



## **NexGen Dispatch User Guide**

version 3.0

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## INTRODUCTION

The intent of this manual is to provide end users with clear instructions on the data entry processes for NexGen, the desktop application version of the Fleet Cost & Care suite of products. Be aware that some functionality and images in this manual represent options that may be turned on or off by the system administrator and other functions may not be available in a specific version of NexGen.

## ABOUT THIS MANUAL

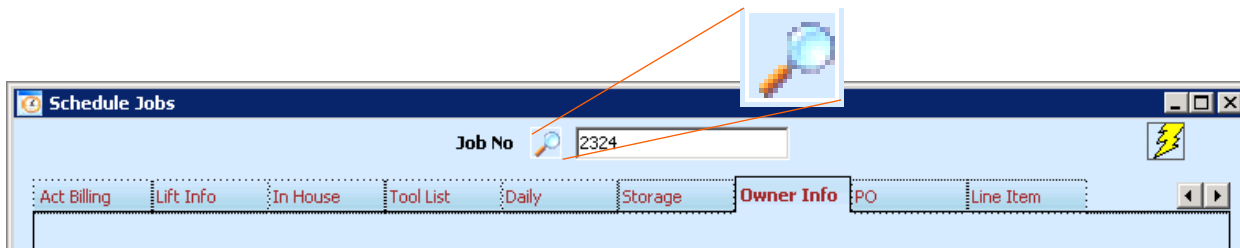
The Dispatch Guide covers the scheduling, ticketing, job review, and labor review processes for jobs and trucking jobs.

## TOOL BAR FUNCTIONS

These terms and icons are used across the NexGen interface.




### Magnifying Glass

The magnifying glass icon is used to represent the search feature throughout NexGen. Click on the magnifying glass whenever a detailed search is required. Options in this view vary depending on which window is selected, but all offer similar functionality based on search criteria.



### Lightning Bolt

The Lightning Bolt represents attachments. There are three variations of the lightning bolt.

-  Unavailable (records are not saved)
-  Available, but no attachments recorded
-  Available, with other attachments already present

The lightning bolt can be found at the top-right of any window that allows attachments. These attachments can also be set to be viewable on job e-tickets and e-LEMs using Atom.

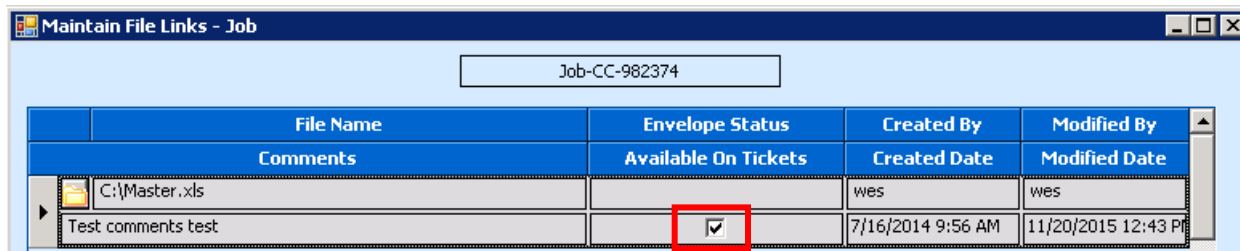


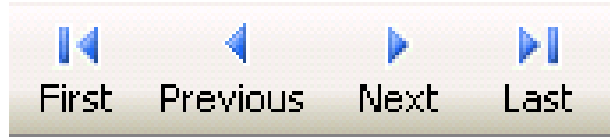
Figure 1: Legacy File Links screen

After adding an attachment, select **Available On Tickets** to allow operators and drivers access to the attachment.

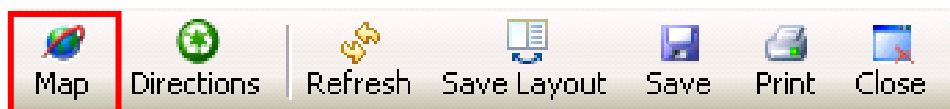
*\*Some users may have a different experience in Maintain > File Links if an administrator has enabled the 'Use API' option in Set System Defaults*

## Record Selectors

Record Selectors can be found on the dashboard toolbar for any record-based view. Select First or Last on any view, and it will pull up the first entered or last entered record according to the window that is open.



## Map



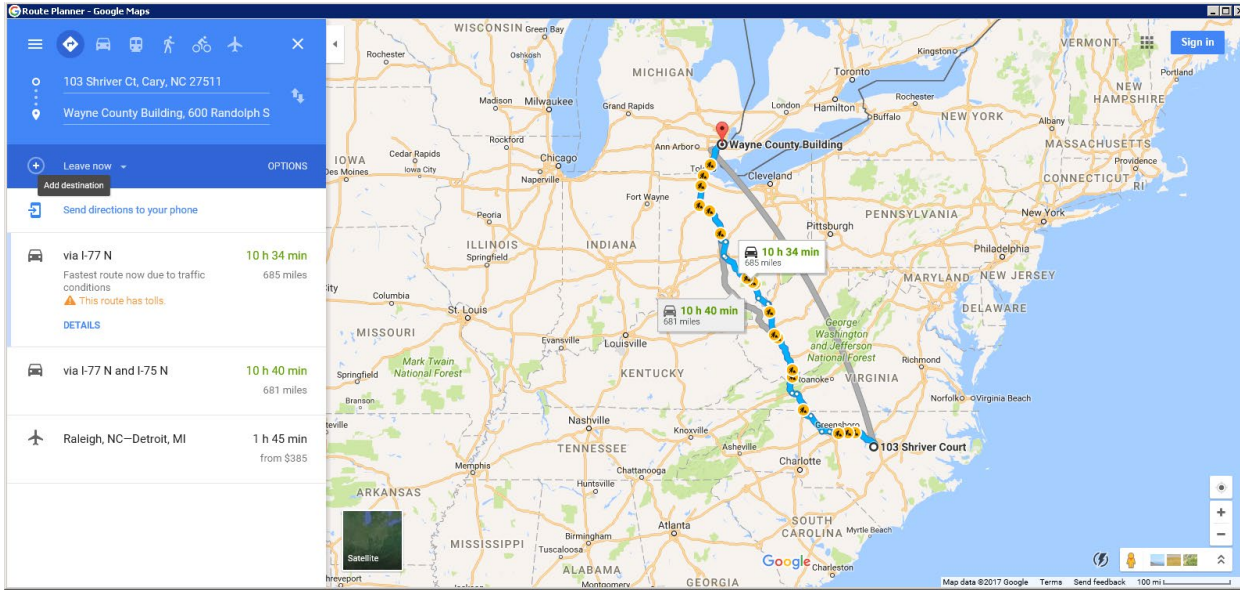
The **Map** button allows a user to view the route from a pre-defined location, like the yard, to a job site. The organization's address must be entered for routing to work. When the icon is clicked, a new dialog box will appear:

The dialog box is titled "Map Selector" and contains the following fields and buttons:

- Select Map:** A dropdown menu showing "Google Maps" and a "Load Saved Map" button.
- From:** A text area containing:
  - Address: 103 Shriver Ct
  - City: Cary
  - State: NC
  - Zipcode: 27511
- To:** A text area containing:
  - Address: 600 Randolph St.
  - City: Detroit
  - State: MI
  - Zipcode:
- Buttons:** "OK" and "Cancel" buttons at the bottom.

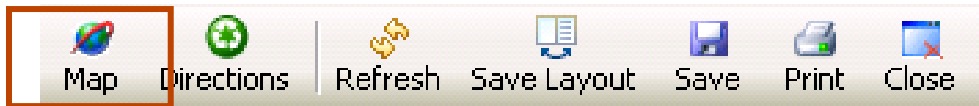
From here, the user can select any of several mapping applications for viewing the map.



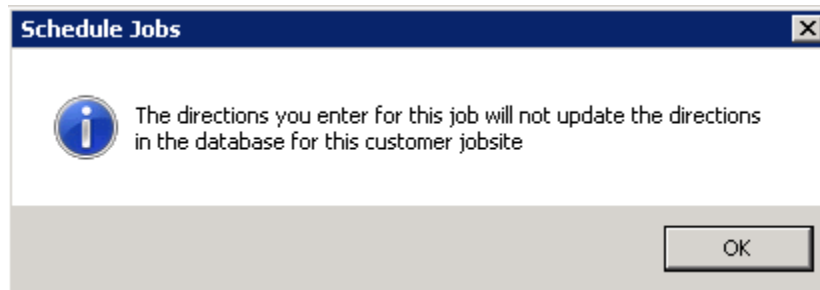


**NOTE:** No mapping software currently exists that accounts for all route restrictions, including height restrictions. Please follow organizational policy when dispatching and routing units to ensure compliance with all DOT regulations, restrictions, and policies. The mapping capability is intended for reference and not for specific routing details associated with the movement of oversize loads.

## Directions

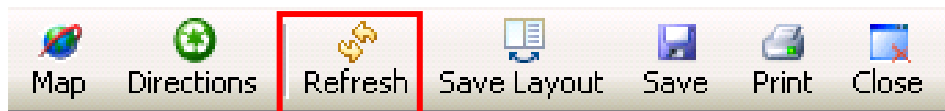


The **Directions** button is used to update the **Directions** field for a specific job site. The intent is to provide a place to enter details for a single job site visit without modifying the saved job site information. When selected, the following dialog will show:



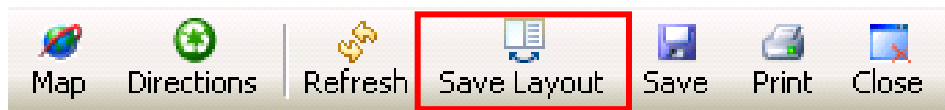
After clicking OK the message, directions can be entered into the **Directions** field of the job.

## Refresh



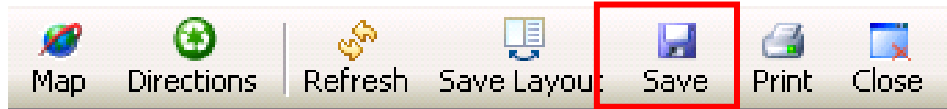
The **Refresh** button is used to refresh table-related information. Select this button if a window has been open and you are unaware of any changes that may have been made or want to see changes reflected.

## Save Layout



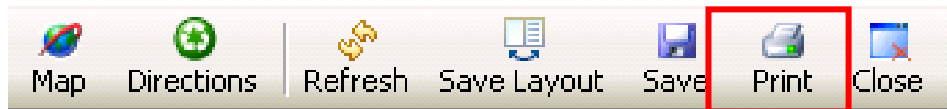
The **Save Layout** button is used to retain layout modifications made during the session. If any modifications have been made, like column width or order, click on Save Layout to retain the changes. If the Save Layout button is not clicked before the default 2-minute refresh period expires, the default configuration will be set again.

## Save



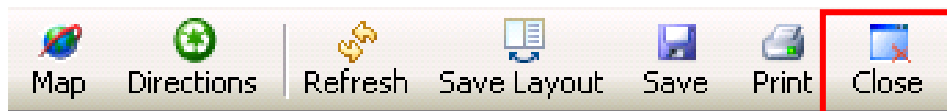
The **Save** button is window-specific. Click on **Save** whenever records are modified to ensure the information is saved in the database.

## Print



**Print** is used to print forms, reports, or other views that are window-specific. If multiple options are available, a separate dialog box will appear with options. Select the appropriate format and OK to view a preview of the form or report to be printed.

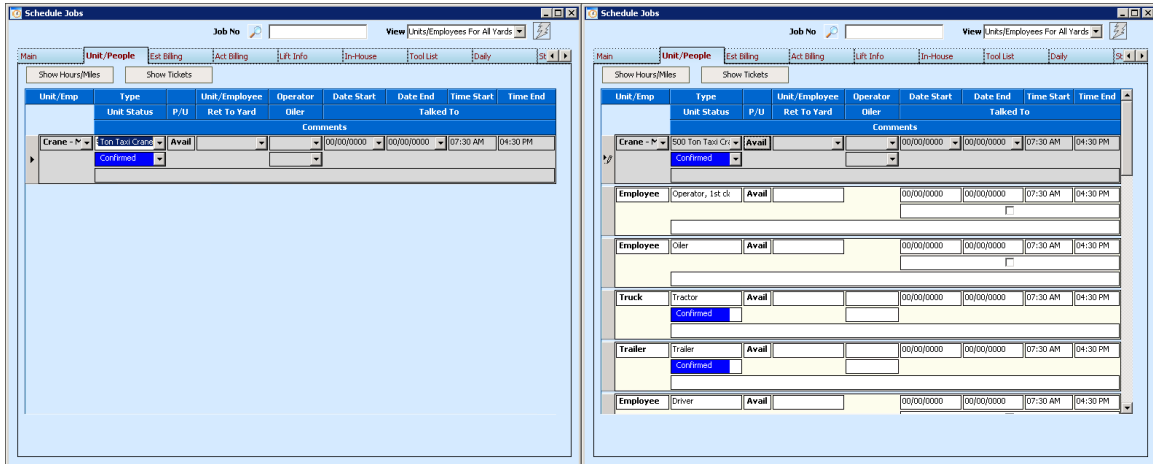
## Close



Close is used to close specific windows. This is the same as clicking on the (X) in the top-right of the window.

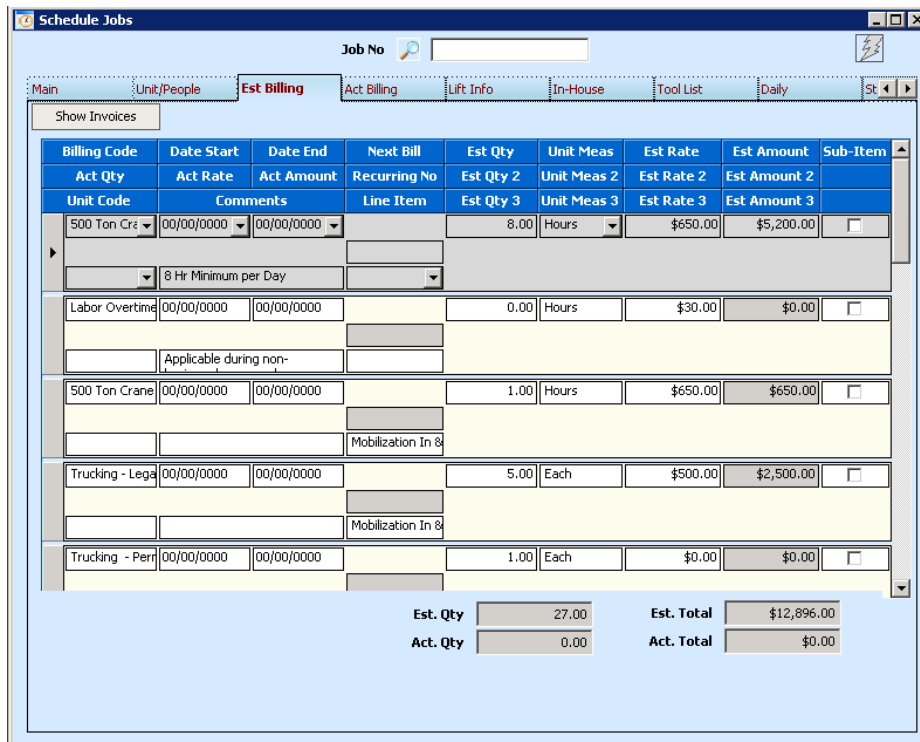
## WORKING WITH UNIT TYPE DEFAULTS

When creating a job, the Main tab will function as normal. When working in the Unit/People tab, after the Type column is populated and tabbed out of, then the Unit Type Default details will be added.



Though hard to read the details, the above images portray the result of selecting the “265-ton Hydraulic Crane” option in the Unit/People tab.

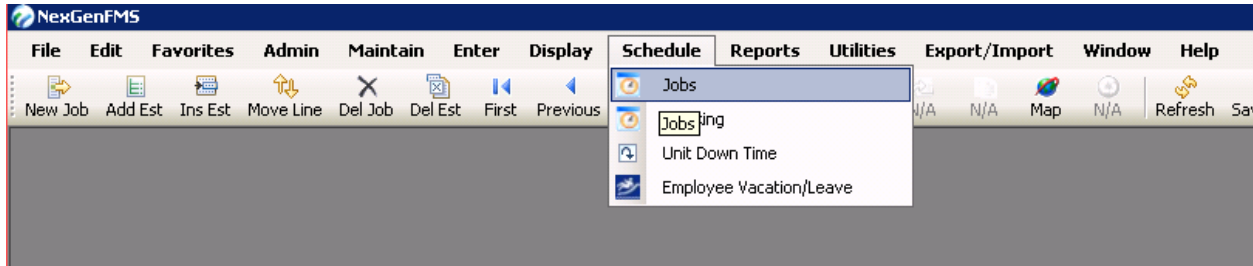
When this Unit Type Default is used, because the Estimate tab was also configured, the Estimate tab of the quote will already have the Estimate line items listed:



All unit types, employee types, and billing codes that were auto-populated by the Unit Type Default may be changed or deleted and new unit types, employee types, and billing codes may be added as necessary.

## HOW TO CREATE A JOB




Begin by selecting **Jobs** from the **Schedule** drop-down on the dashboard menu bar.



### Main tab

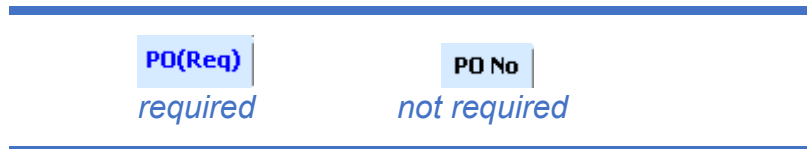
Use the Schedule Jobs window to schedule jobs.

1. The **Job No** field will auto-increment once the job has been saved, but may be overridden if organizational policy allows.

2. The **Yard** field will auto-populate based upon the default setting, but if the job is for another yard, then use the drop-down box (  ) next to the **Yard** field to pick a different yard.
3. The **Company** field may be set by default, but should always be verified.
4. The **Department** field may be set to default, but should always be verified. If a change needs to be made, use the drop-down box next to **Department** and pick the appropriate Department that was set up by the Administrator (these are user-defined fields).
5. The **Customer** field: start typing the customer name and then use the drop-down box to select the correct customer. If the customer is not in the system and needs to be added, click on the (  ) box next to **Customer**.
6. The **Job site** field reflects the details associated with a specific customer's job site. Start typing the job site name and then use the drop-down box to select the correct job site. If a new job site is required, select (  ) next to **Job site**.

7. Enter the **Job Date** and **Job Time**.  
**Note:** The **Flexible** checkboxes can be checked if the job dates and/or times are flexible for other days or times.  
  
**Note:** If the employee is supposed to work through the weekend check the checkbox next to **Work Weekends**.
8. Click on the drop-down next to **Job Type** to select the **Job Type**.

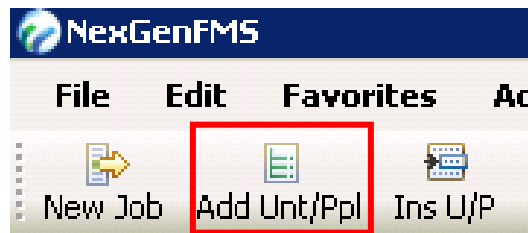
9. The **Salesperson** may auto-populate based upon information within the CUSTOMER table, but if it does not then enter the **Salesperson**.
10. **Checked By** is who checked the jobsite.  
**Note:** This should be the sales person or other representative from the company. Leave blank when a site has not been checked.
11. **Taken By** is used when completing the job information entry on behalf of someone else.
12. **PO No**, if available can be entered here; if it is not available and is required, an invoice cannot be generated until the PO has been entered.



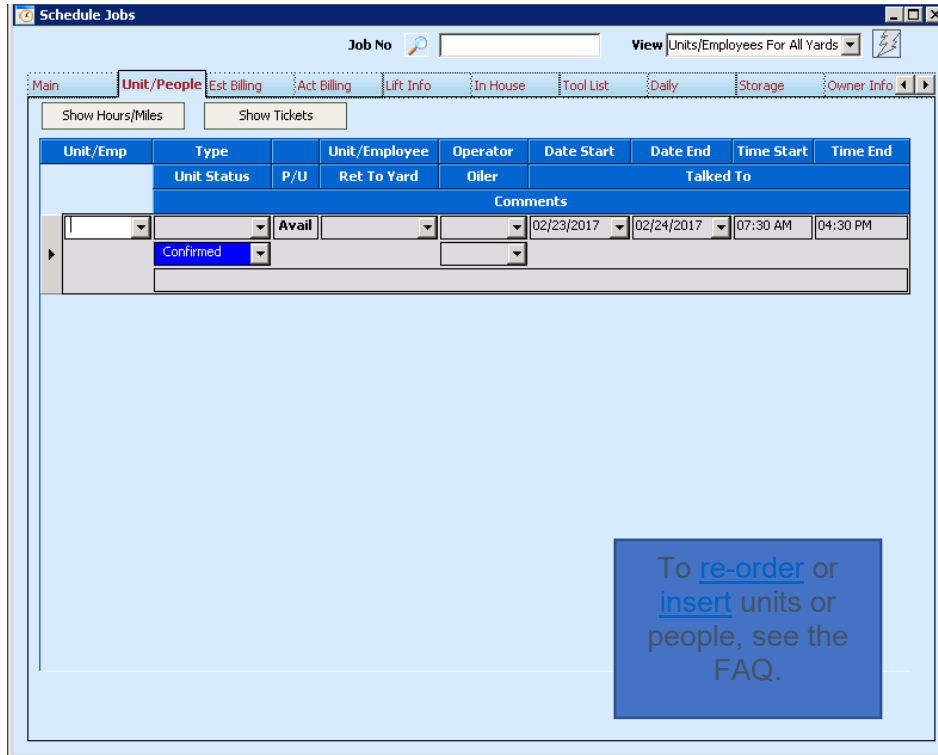
13. **Equipment Required** is a text field where any additional equipment can be recorded.
14. **Comments** are where special instructions can be entered.
15. **Description of Work** is an explanation of what is being done on the jobsite.  
**Note:** This information will carry over to the invoice.
16. Select the **Terms & Conditions** according to company policy.
17. Identify if the job requires **Insurance** by checking the checkbox. If insurance is required, an **Expires** date will be required.
18. Identify if a **Signed Contract** is required for the job; if so, a **Contract No** will be required.
19. Select the **Billing Type** for the job.
20. Identify if **Certified Pay** is required and if any **Retainage %** is required. Enter information as appropriate.
21. If used, select an appropriate **Check List** for the job.
22. Now click on the **UNIT/PEOPLE** tab.

## Unit/people tab

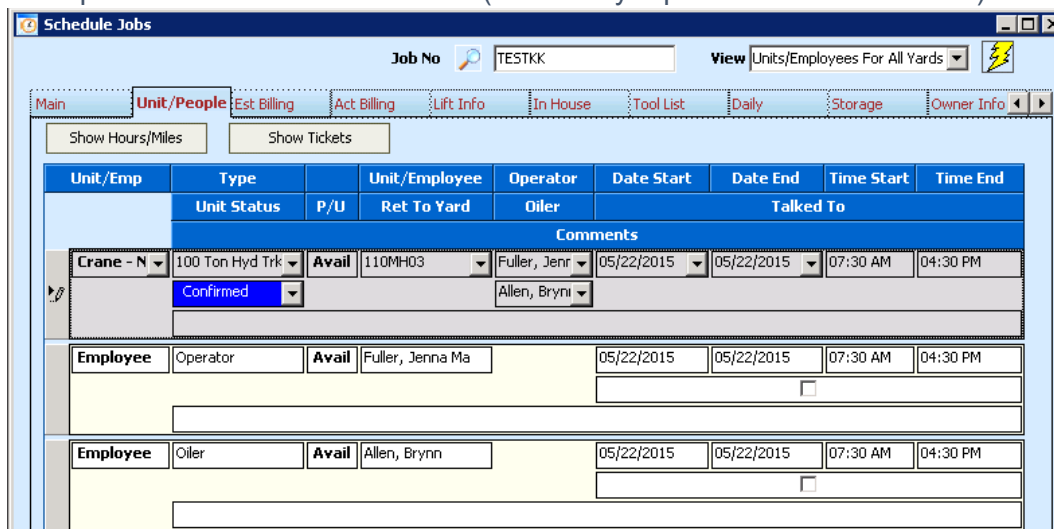
1. Click on **Add Unt/Ppl** from the toolbar and the below will appear. Alternatively, press CTRL + A or right-click on any non-editable area of the window and select the option from the drop-down menu.







2. From the **Unit/Emp** drop-down box, select the desired entity.
3. From the **Type** drop-down box in the second column, select the type of unit or employee required.
4. From the **Unit/Employee** drop-down box in the third column, select the actual equipment or employee being assigned to job. It is a best practice to leave these fields blank until close to job execution to reduce the number of changes that need to be made.
5. You can add multiple Unit/People from the drop-down for all units and people on the job by repeating steps 1 through 4.
6. Here is an example of what this would look like (this is only representative information).



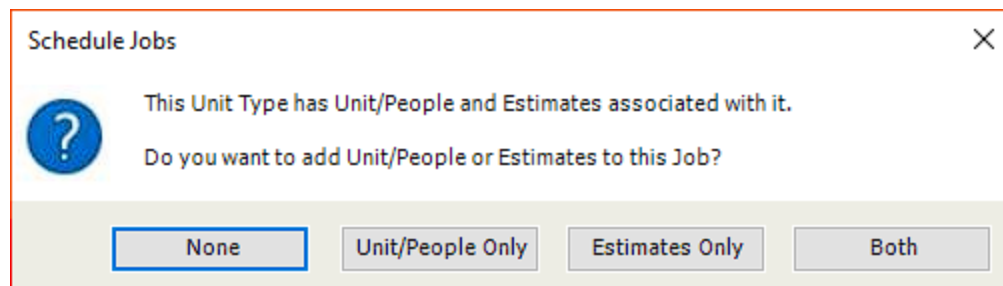
The minimum amount of information to create a job is a customer name and a job date. However, an organization may apply additional required fields to ensure enough information is captured for a job. Refer to company policy for specific required fields.

The job dates, identified on the Main tab, are used to identify the dates of rental. These do not always coincide with delivery or pickup dates. The Date Start and Date End help to show everyone the plan for unit movement. If a unit is to arrive early or be picked up after job completion, adjust the Date Start and Date End dates accordingly. This will reflect on the unit schedule.

**Unit/People**, **Lift Information**, **In House** comments, **Tool List** records, **Daily** ticketing, **Storage\*** records, **Additional Info**, , and **Line Item** information. These features may be found using the tabs at the top of the Schedule Jobs window. Some of these features are discussed in this manual; the remainder are covered in their appropriate manuals. The **Act Billing** and **PO** information tab is for reference only; it cannot be modified from this window and will only be populated with records after an invoice or a PO has been generated.

### Unit Type Defaults and Jobs

Unit Type Defaults are pre-defined 'packages' setup on a Unit Type to automatically pull in additional units or people for a job (also used on a quote). When a unit with a Unit Type Default is selected on a job, you will be prompted with multiple options:



Option 1: None – will result in no additional units, people, or estimates being added to the job.

Option 2: Unit/People Only – will result in the default 'package' being added to the Unit/People tab.

Option 3: Estimates Only – will result in the default 'package' being added to the Estimates tab.

Option 4: Both – will result in the defaults being added for both Unit/People and Estimates.

Depending on how an administrator defined the defaults will determine when it is appropriate to do each option.

Scenario 1 – Unit Type Default is defined as just the primary employee type of the unit and associated Billing Code in Estimates

In this scenario, the Unit Type Default can quickly add the Employee row when the user tabs through or clicks away from the active record. If it is desired to add an additional Billing Code for the unit, then select Option 4; to skip the Estimate portion, select Option 2.

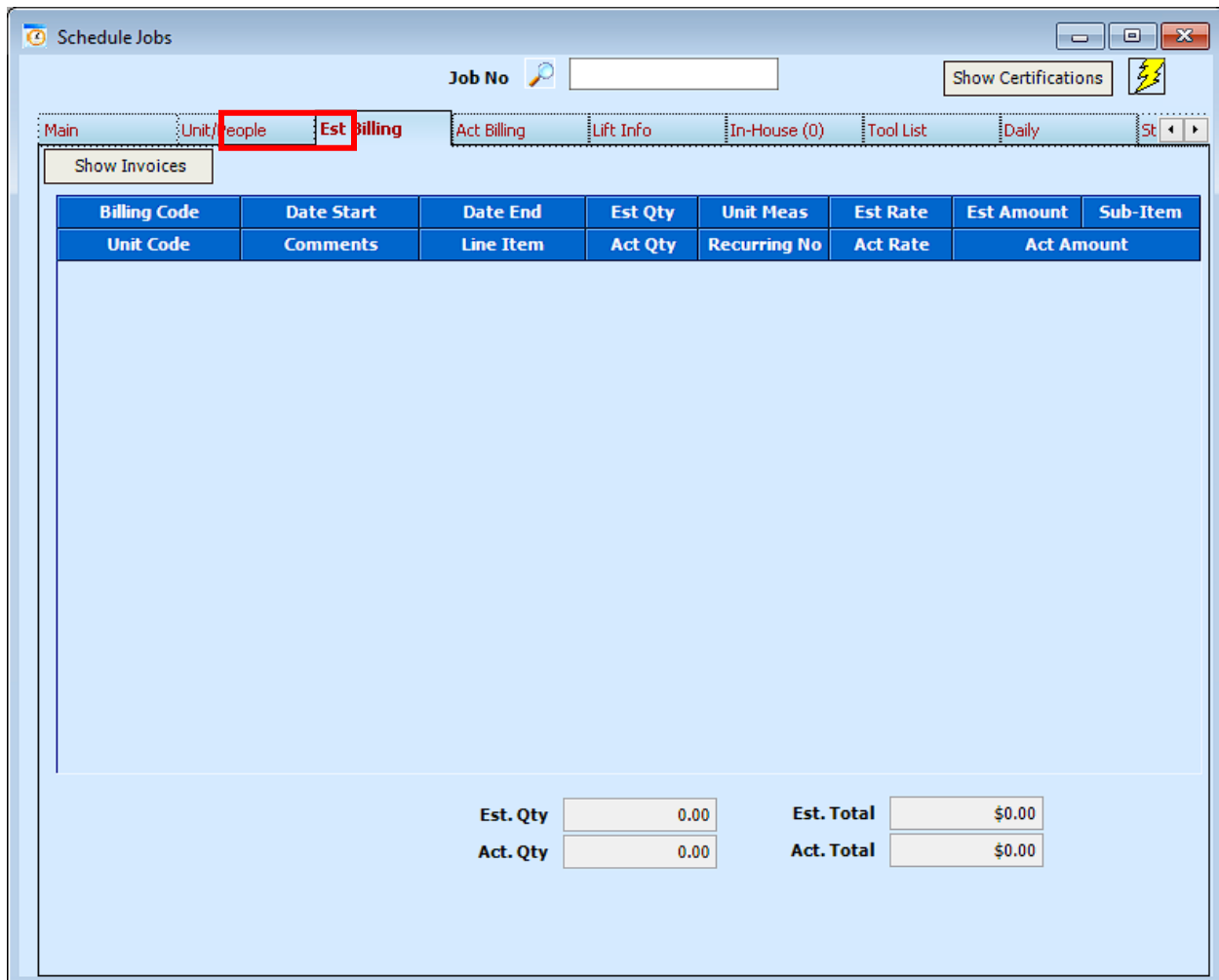
Scenario 2 – Unit Type Default is defined as the standard 'package' of resources for a mobilization and mobilization Billing Codes in Estimates

In this scenario, the Unit Type Default has been defined as the mobilization package, this is common with larger units that require truckloads to deliver to the job site. If adding the unit to the job for the first time (assuming the job did not originate from a quote), select Option 4. This will populate the full package of the unit and the associated estimated billing. If the unit is already listed on the job and the estimates in place, it may be better to use Option 1. This will avoid duplication of resources and billing codes.

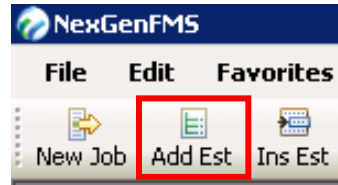
There are many more scenarios that you may run into; after using the feature, it should be easy to discern the appropriate option to choose.

## Est Billing Tab

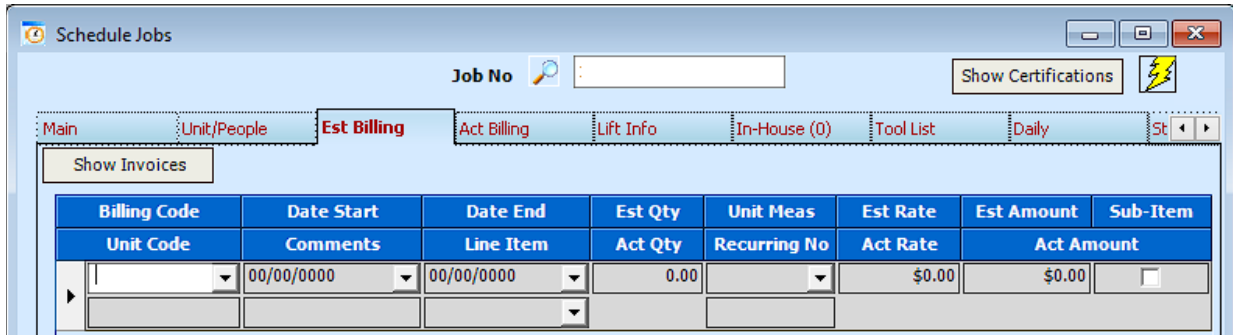
The Est Billing tab, or Estimated Billing, is used to record the planned labor, units, billing codes, and cost of the job. This information is carried through to the invoice.



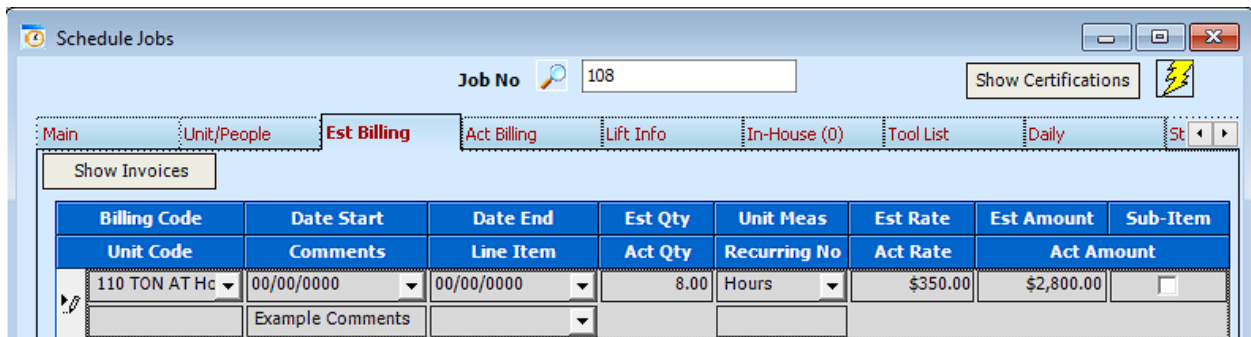
To add a new estimate item, click on **Add Est** or hit CTRL + A.



The following will appear:



1. Select the appropriate **Billing Code**.
2. The Date **Start** and **Date End** dates should generally be left blank. However, they can be used if company policy dictates.
3. Enter the estimated quantity in **Est Qty** and select the unit of measure from **Unit Meas**.
4. Enter the **Est Rate** if it is not auto-populated.
5. Enter **Comments** associated with the billing code. These comments carry through to the invoice.
6. Per internal policy, select the appropriate **Line Item**.



7. Repeat these steps for each billing code. If recurring billing is applied, additional information will be present (Recurring No) will be filled in.

**Note:** Information entered on this screen carries through to billing. It is very beneficial to fill each record completely, to provide the clearest intent for Accounts Receivable. Additionally, filling these prior to job execution reduces the review process time requirements.

## Lift Info Tab

This information is used to record lift specific information for units. Field names are user-definable, in that, a manager with appropriate permissions can modify, and will appear on the Job Ticket, E-Ticket, and Trucking Ticket as appropriate. The first 10 fields of the Lift Info tab appear on job tickets, E-Tickets, and E-LEMs. The remaining 5 fields, under Trucking Info, only appear on trucking related tickets.

The screenshot shows a software window titled "Schedule Jobs" with a "Job No" field containing "2324". The "Act Billing" tab is highlighted with a red box. The "Lift Info" section contains the following fields:

Field Name	Field Type
Lift Radius	Text Input
Height	Text Input
Crane Capacity	Text Input
Pieces	Text Input
Total Weight	Text Input
CWT Config.	Text Input
Boom Length	Text Input
Set Back Fr. Bldg.	Text Input
Radius	Text Input
test height	Text Input

The "Trucking Info" section contains the following fields:

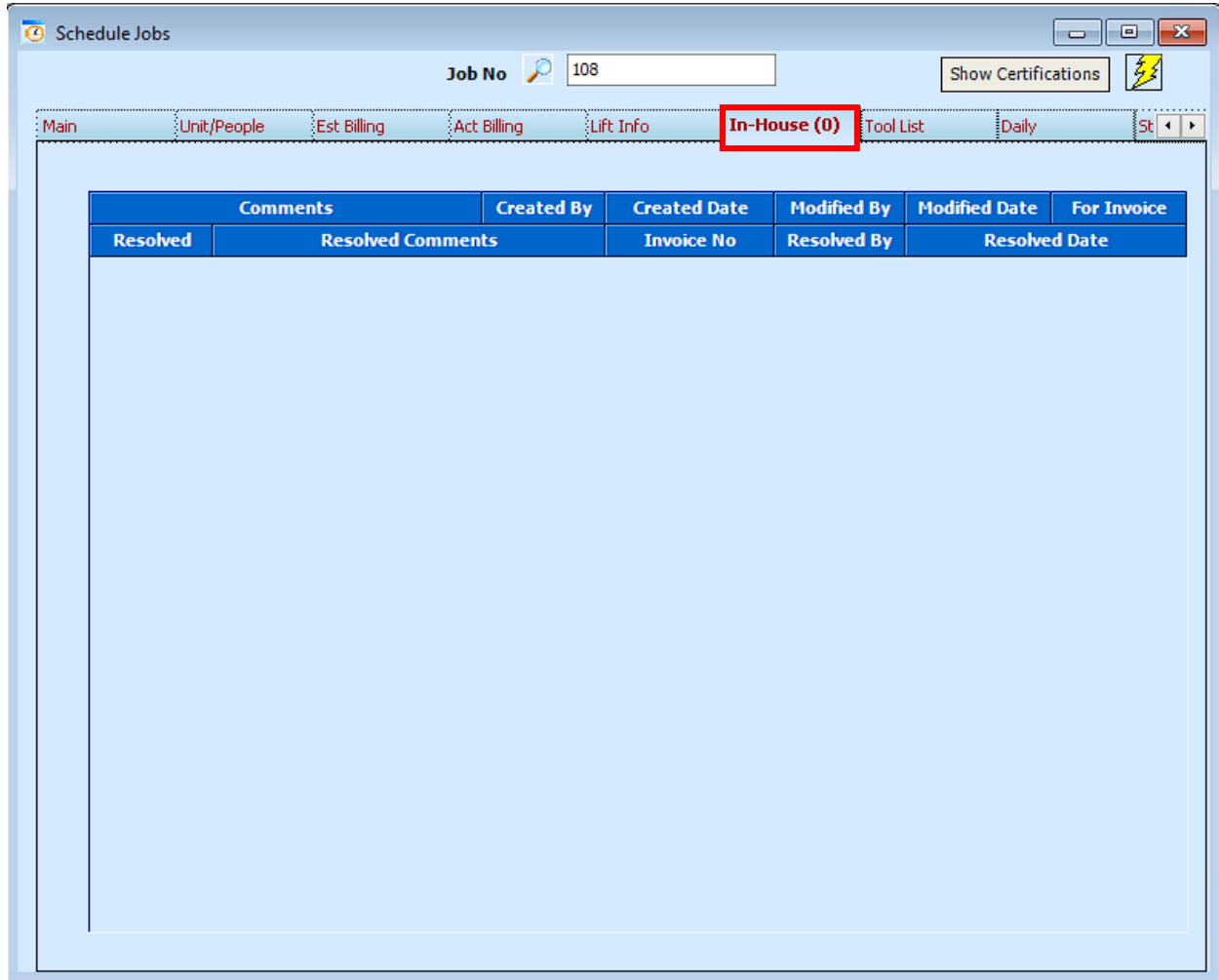
Field Name	Field Type
Length	Text Input
Width	Text Input
Height	Text Input
Pieces	Text Input
Total Weight	Text Input

All fields are optional and are intended to provide the employee with more information.

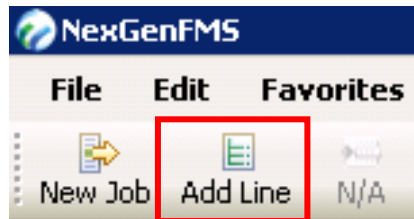
## In House Tab

The In House tab is used to record in-house comments used to track the progression of a job. For instance, a user can record the details of any conversation or email correspondence here and can build a log of such conversations for future reference.

**Note:** The In House comments can only be viewed from this tab and cannot be printed or emailed.

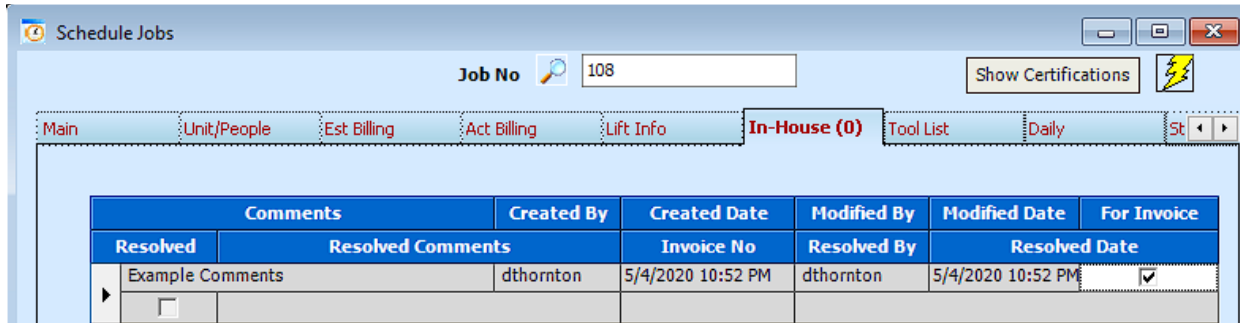


Click on Add Line or hit CTRL + A to add a new comment. The (0) in the tab represents the number of records added to this tab.



After adding a new line, enter any comments relevant to the job and click Save on the dashboard toolbar. The advantage to the In House comments is that each entry will have a Created By and Crated Date timestamp to show when the information was entered. This saves users from having to manually enter such details.

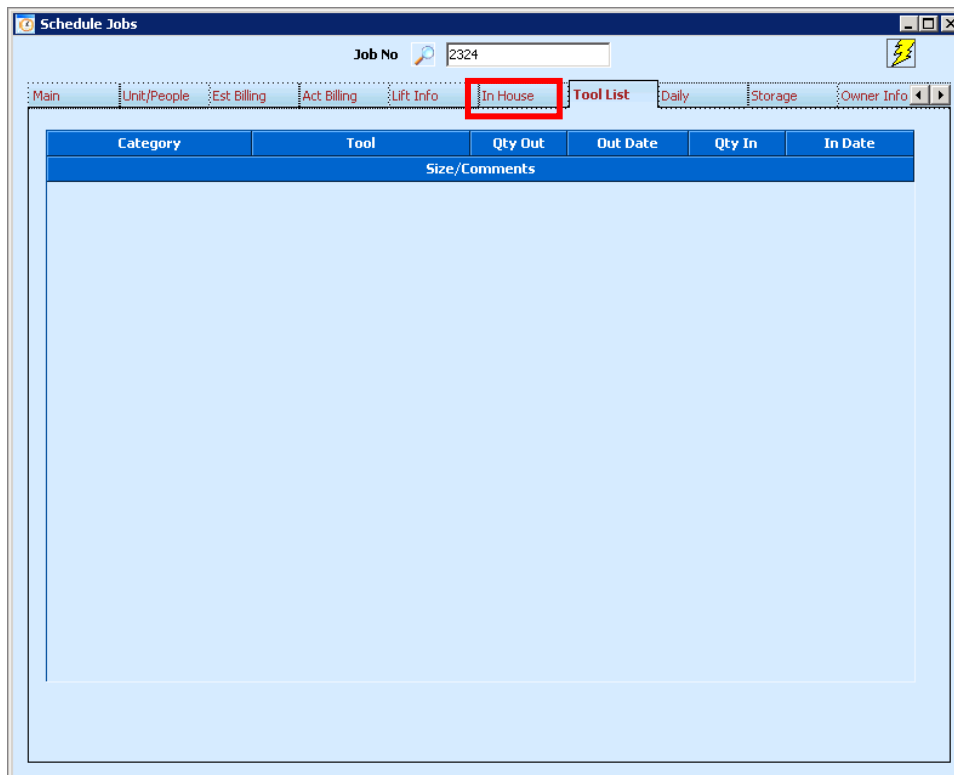
If a comment is intended for billing, check the column titled 'For Invoice'; this will pass the message to billing when an invoice is generated. Billing will then, in their workflow, check 'Resolved' to indicate that the comment was acknowledged and to populate the specific 'Invoice No' the comment was addressed on and may add additional comments related to the resolution.



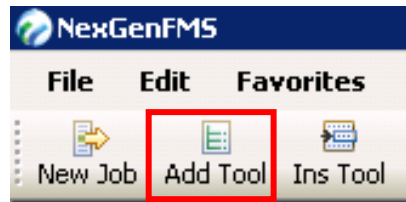
CTRL + S will also save the job.

## Tool List Tab

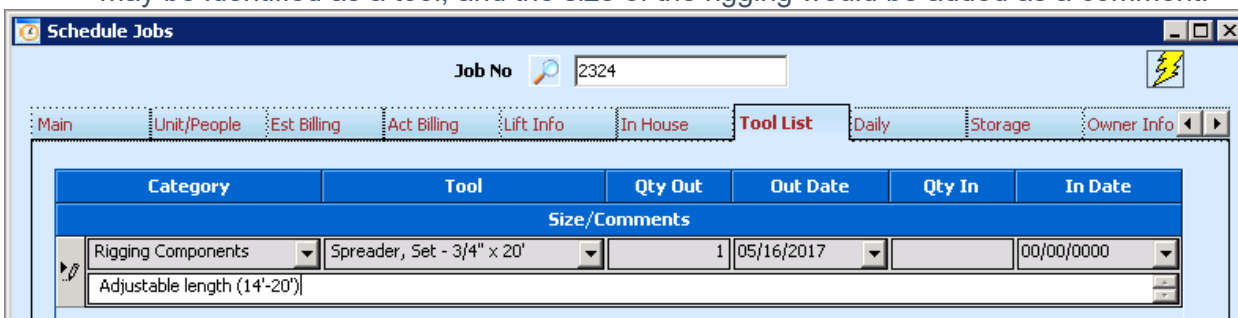
This tab provides a listing of any non-serialized, but accountable tools that may be used on a job. For example, most rigging does not have serial numbers, but must be accounted for. These items should be tracked on this tab.



To add a new tool to the list, select Add Tool on the dashboard toolbar. This can also be done by pressing CTRL + A or right-clicking in any non-editable area of the window and selection the option from the drop-down menu.



1. Select a **Category** from the drop-down menu.
2. Select a **Tool** from the drop-menu.
3. Enter the **Qty Out** and **Out Date**.
4. When the tool is returned, add the **Qty In** and **In Date** to update the record.
5. The Size/Comments field may be used to enter specific details about the tool. For example, rigging may be identified as a tool, and the size of the rigging would be added as a comment.

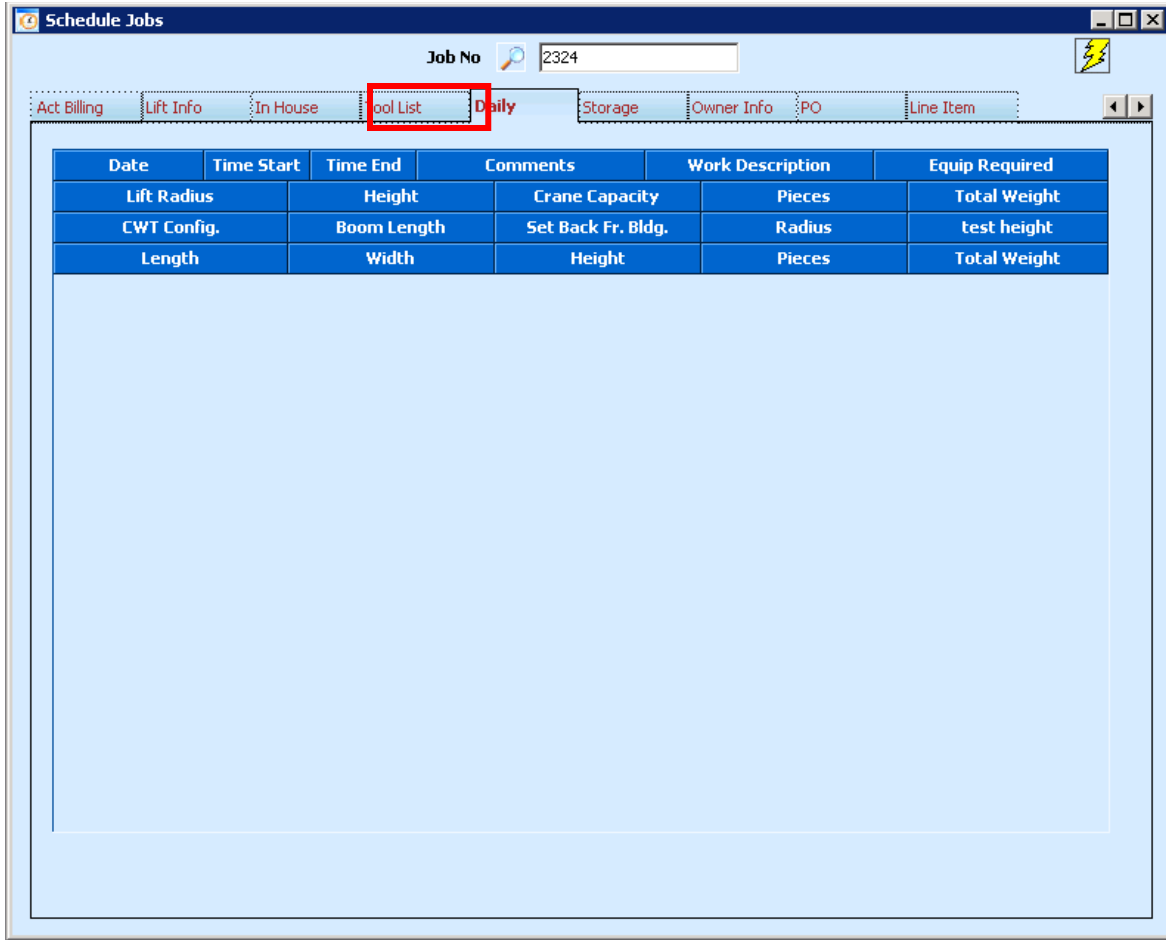


6. Repeat steps 1 through 5 for each tool associated with the job.

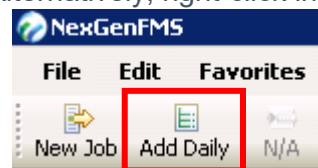
## Daily Tab

The Daily tab allows for a more granular approach to job information. Details can be added for specific job dates to ensure the operator or driver has information that is specific for a given scope of work, even when on a complex project. This tab will only be used when applicable and will be used in place of the information from the Unit/People tab and Main tabs when used.

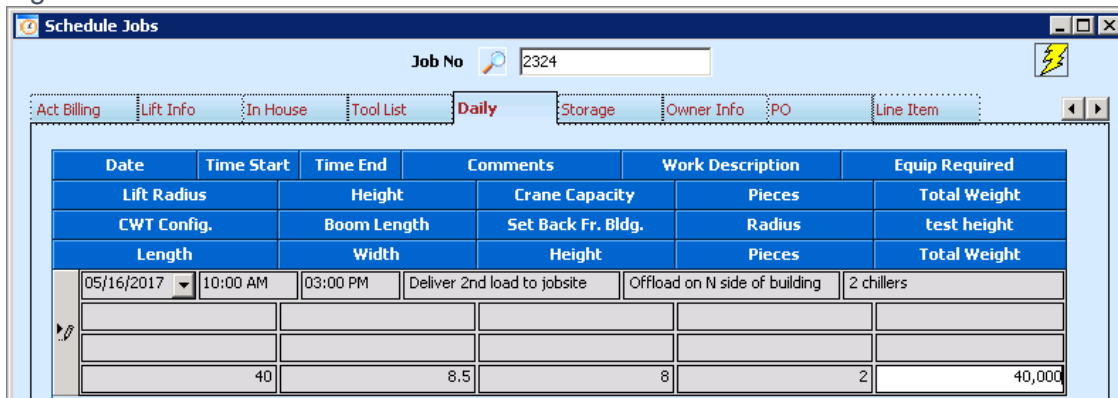




Select Add Daily on the dashboard toolbar or type CTRL + A. Alternatively, right-click in any non-editable area of the window and select the option from the drop-down menu.

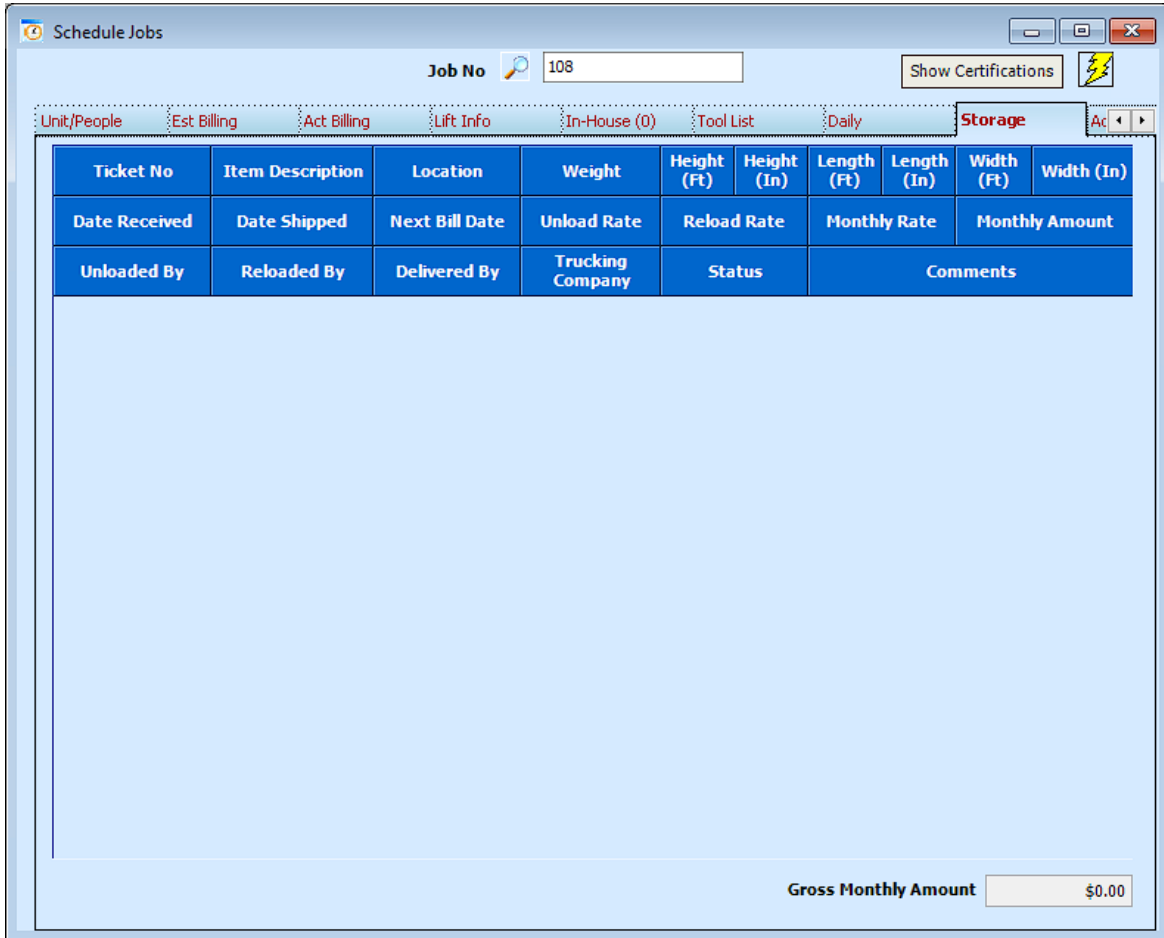


1. Fill each field as it pertains to the specific date of work. The bottom row of fields is used specifically for trucking.

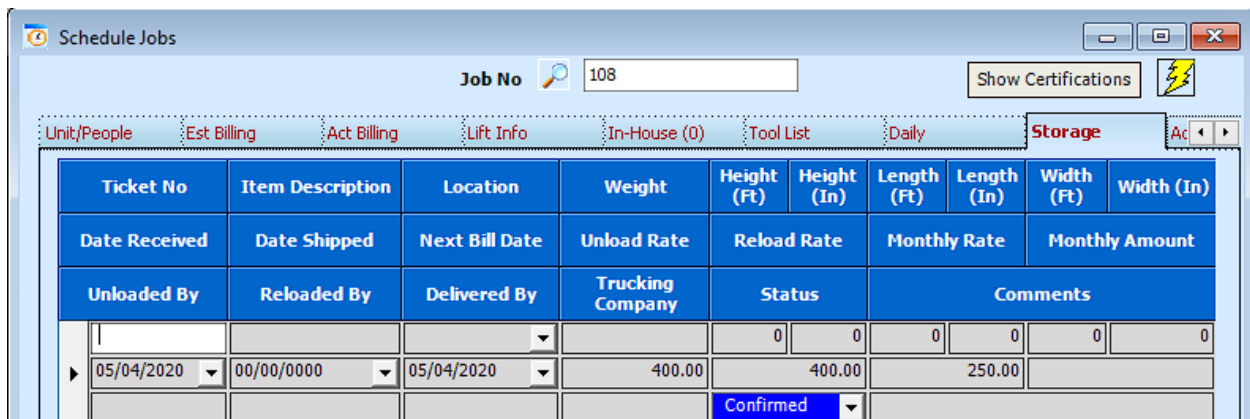


## Storage Tab\*

This **Storage** tab is an optional tab and may or may not be present. This tab is used for customer items like mechanical units, telecommunications units, or other customer-related items.



Begin by selecting **Add WH** or typing CTRL + A or right-clicking in any non-editable area of the window and selecting the option from the drop-down menu. Through the admin menu, settings can be defined to set costing associated with unloads and reloads.



1. Enter a **Ticket No.** This number is arbitrary and should be used to refer to the specific item. This number must be unique regarding the specific job. A best-practice would be to always order tickets incrementally from 1. This allows for the following convention: Job No – Ticket No. For example, 2324-1 would represent the first ticket for job number 2324. Only the ticket number needs to be entered in this field. A great practice is to print stickers for stored items from this window. The sticker can be applied to an item and tracked/inventoried during its stay on the premises.
2. **Item Description** is a comment field; enter specific details about the item.
3. **Location** refers to the physical location of the item on the premises. A best-practice would be to assign reference numbers or other identifiers to specific locations, like A-10 to better associate the item with a location.
4. Enter the **Weight, Height, Length, and Width** of the item.
5. The **Date Received** will populate automatically; if incorrect, adjust accordingly.
6. The **Date Shipped** is used only when the item has left the yard and does affect invoicing. Leave this until the item ships.
7. **Next Bill Date**, representing the start of the next billing cycle. By default, this populate when the Date Shipped is populated. This date may be changed but will impact when this item is eligible for invoicing.
8. When applicable, enter the **Unload Rate** and/or **Reload Rate**, unless internal policy follows different entry methods. If costs are standardized, these fields can be set to auto-populate.
  - a. Refer to Admin > Set System Defaults, Storage tab to adjust the auto-calculation method.
9. The **Unloaded By** is used to identify the personnel responsible for the unloads.
10. The **Reloaded By** is used to identify the personnel responsible for the reloads.
11. **Delivered by** refers to the shipping company that delivered the item to the yard.
12. **Trucking Company** refers to whom will be delivering the item to the customer.
13. **Status** works just like Jobs and is used to identify tentatively scheduled items or confirmed items.
14. **Comments** may be entered to better identify location, item description, or any other details about the storage item.
15. Repeat steps 1 through 12 for each new storage item.

## Additional Info Tab

The Additional Info tab is used for lien information and Owner-Controlled Insurance Program (OCIP) related projects. Only use this tab if the company does liens, pre-liens, Notice of Commencements, OCIP jobs, or projects. This type of job requires additional reporting and may be filled out by an accounting representative when applicable.

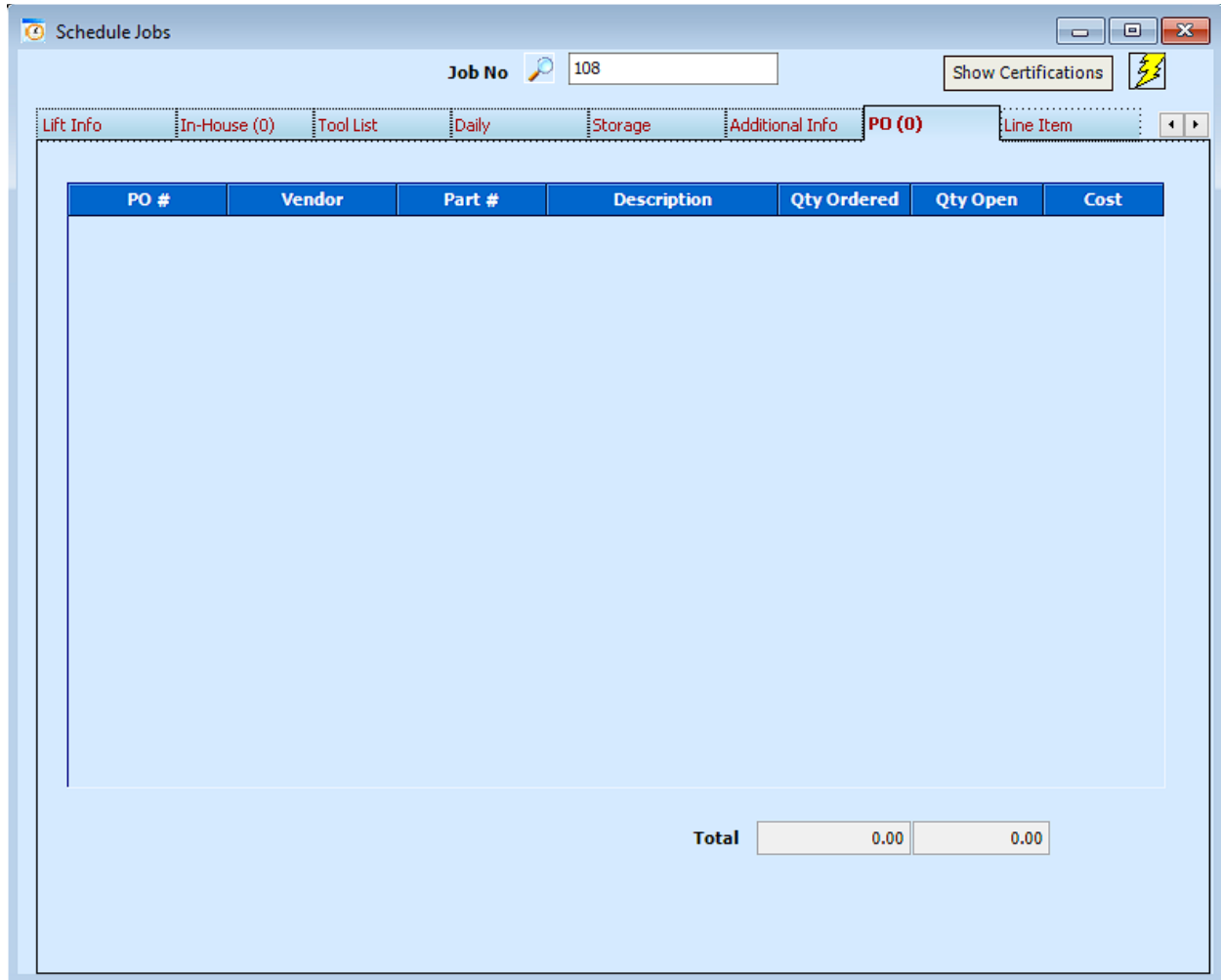
The screenshot shows a software window titled "Schedule Jobs" with a search bar for "Job No" containing the value "108". Below the search bar are several tabs: "Lift Info", "In-House (0)", "Tool List", "Daily", "Storage", "Additional Info" (which is selected), "PO (0)", and "Line Item". A "Show Certifications" button with a lightning bolt icon is also visible. The main content area contains a form with the following fields and controls:

- Owner Same as Customer Address
- Owner Name: [Text Field]
- Address: [Text Field]
- City: [Text Field]
- State: [Dropdown Menu]
- Zip: [Text Field]
- Country: [Text Field]
- Phone: ( ) - Ext. [Text Field]
- Legal Description: [Large Text Area]
- Project No: [Text Field]
- OCIP:
- Union: [Dropdown Menu]
- Pre-Lien Date: 05/04/2020 [Dropdown Menu]
- Pre-Lien Amount: \$0.00 [Text Field]
- Lien Date: 05/04/2020 [Dropdown Menu]
- Lien Amount: \$0.00 [Text Field]

Fill out each of the fields as appropriate, per organizational policy and check the **OCIP** checkbox if and when applicable. The **Project No** field may be used to record an internal project number that helps group jobs together when working on multi-phase or other large projects.

## PO Tab

The PO tab is a reference tab that shows all POs associated with the job. New POs cannot be generated from this view. To create a new PO, select **Enter, PO Requisition** and fill-in the fields. This can also be done through Enter->Purchase Orders if company policy allows. Refer to the How to Create a PO guide for more information.



When a PO exists for a job, and it has been assigned to the job, it will show up on this tab. If a PO is present, it can be double-clicked to bring up PO specific related details. Like In House Comments, the (0) on the tab refers to the number of Purchase Orders associated with the job.

### Line Item Tab

The Line Item tab is intended to be used as a reference tool, but can be modified when necessary. The records are populated based on selections in the Estimate tab, but if an error occurs regarding line items, refer to this tab to determine where the conflict resides. Line Items are used by project managers and management to breakout costs in specific ways like phases; or, for consolidation of billing items.

Schedule Jobs

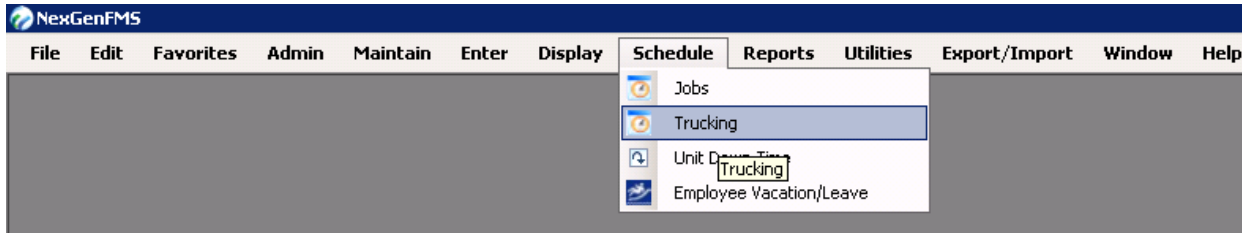
Job No 2324

Act Billing | Lift Info | In House | Tool List | Daily | Storage | Owner Info | PO | Line Item

Line #	Line Item	Amnt Quoted	Est Expenses	Est Hours
	Exp/Rev/Both	Invoiced To Date	Act Expenses	
1	Mobilization In & Out	\$1,260.00	\$0.00	0
	Both		\$0.00	
2	On-Site Operation	\$4,800.00	\$0.00	0
	Both		\$0.00	

## HOW TO CREATE A TRUCKING JOB

Begin by selecting **Trucking** from the **Schedule** drop-down on the dashboard menu bar.






### Main tab

Use the Schedule Jobs window to schedule requested trucking jobs. If it is a repeat customer requesting an existing unit in the system, scheduling trucking jobs can be completed very quickly.

The 'Schedule Trucking Jobs' window contains several sections for data entry:

- Job Info:** Job No (AUTO), Yard (Atlanta Yard), Job Date (00/00/0000), Job Time (07:30 AM), Job Type (Hourly), Status (Confirmed).
- Company Info:** Company (Fleet Cost & Care), Dept (Bare Rental), Customer (New), Bill To (Corporate Address), Loc To (New), Cust From (New), Loc From (New).
- Reporting:** Report To (New), E-Mail, Ordered By (New), E-Mail.
- Work Details:** Work Weekends (checked), Dispatched (unchecked), Signed Contract (unchecked), Sales Person, Taken By, PO No, Items to Ship, Instructions, Description of Work.
- Terms & Conditions:** Terms & Conditions (Terms - GA), Certified Pay (unchecked), Check List.
- Created/Modified:** Created By, Created Date, Modified By, Modified Date.
- Address Fields:** Bill To Information, Job Site From Information, Job Site To Information (each with Address, Phone, and Fax fields).

23. The **Job No** field will auto-increment once the job has been saved.

- 24. The **Yard** field will auto-populate based upon the default setting, but if the job is for another yard, then use the drop-down box (  ) next to the **Yard** field to pick a different yard.
- 25. The **Company** field is set by default.
- 26. The **Department** field may be set to default, but should always be verified. If a change needs to be made, use the drop-down box next to **Department** and pick the appropriate Department that was set up by the Administrator (these are user-defined fields).
- 27. The **Customer** field: start typing the customer name and then use the drop-down box to select the correct customer. If the customer is not in the system and needs to be added, click on the (  ) box next to **Customer**.
- 28. The **Loc To** field reflects the details associated with a specific customer's delivery location. If a new delivery location is required, select (  ) next to **Loc To**. Another way to look at **Loc To** is that it is the Ship To location.

- 29. The **Cust From** and **Loc From** fields are the point of origin information. This is used to identify where the truck is to pick up the item(s) that it will be delivering to the **Loc To** field. This may be a separate customer's location, the company yard, or any other location that is separate from the destination.
- 30. The **Report To** field and **E-Mail** and phone fields are used to identify a point of contact. This point of contact may be at the **Loc From** location or the **Loc To** and will provide instructions as necessary to the driver.



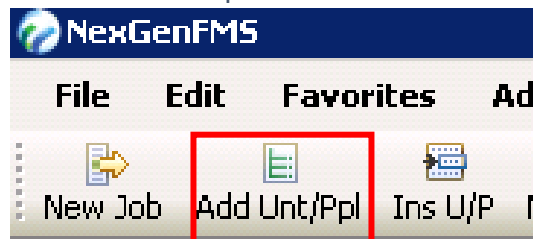
- 31. The **Ordered By**, **E-Mail**, and phone fields are used to identify the individual taking responsibility for the job. This may be the same as the **Report To**.
- 32. Enter the **Job Date** and **Job Time**.  
**Note:** The **Flexible** checkboxes can be checked if the job dates and/or times are flexible for other days or times.  
**Note:** If the job goes through the weekend check the checkbox next to **Work Weekends**.
- 33. Click on the drop-down next to **Job Type** to select the **Job Type**.
- 34. The **Salesperson** may auto-populate based upon information within the CUSTOMER table, but if it does not then enter the **Salesperson**.
- 35. **Checked By** is who checked the jobsite.  
**Note:** this could be the salesperson or it could be customer verified, etc. – this should be entered as to confirm that the equipment required will work on the jobsite.
- 36. **Taken By** would be the person that took, or scheduled, the job (the Dispatcher, the Salesperson, etc.)
- 37. **PO No** will need to be filled out if a PO is required as determined by the administrator.

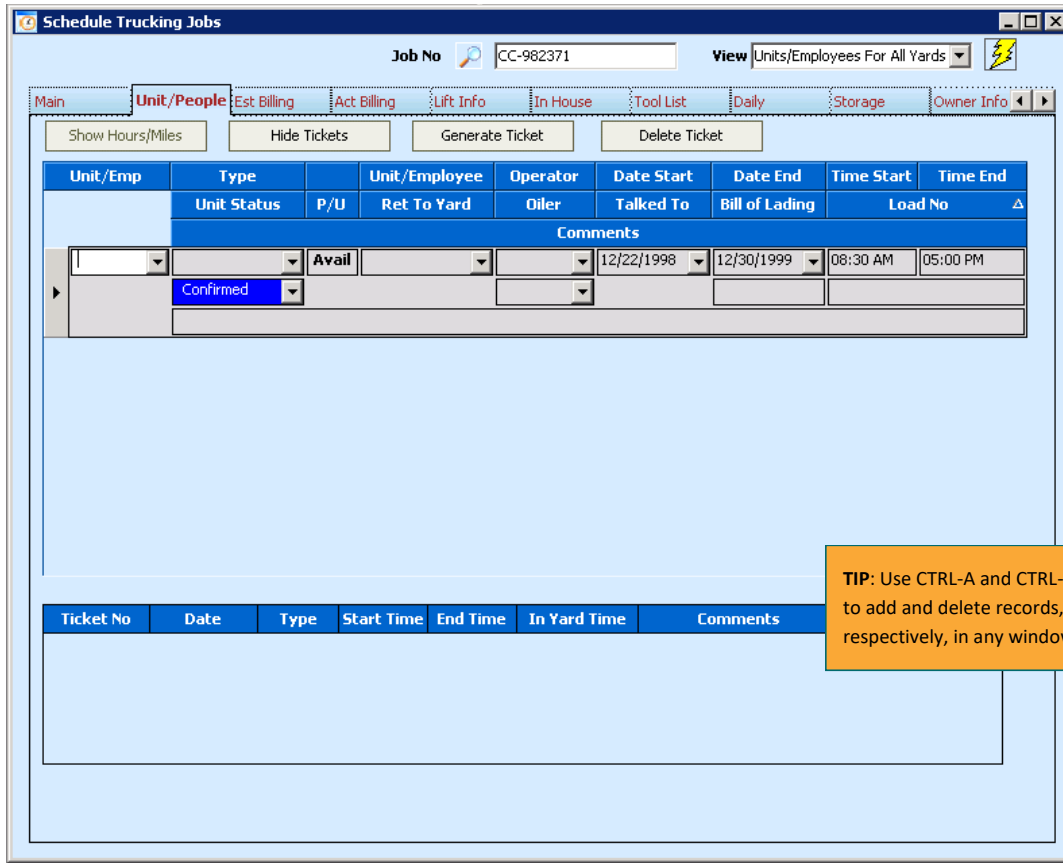


- 38. **Items to Ship** is a text field where all the item(s) can be recorded.
- 39. **Instructions** are where special instructions can be entered.
- 40. **Description of Work** is an explanation of what is being done on the jobsite.  
**Note:** This information will carry over to the invoice.
- 41. Now click on the **UNIT/PEOPLE** tab.

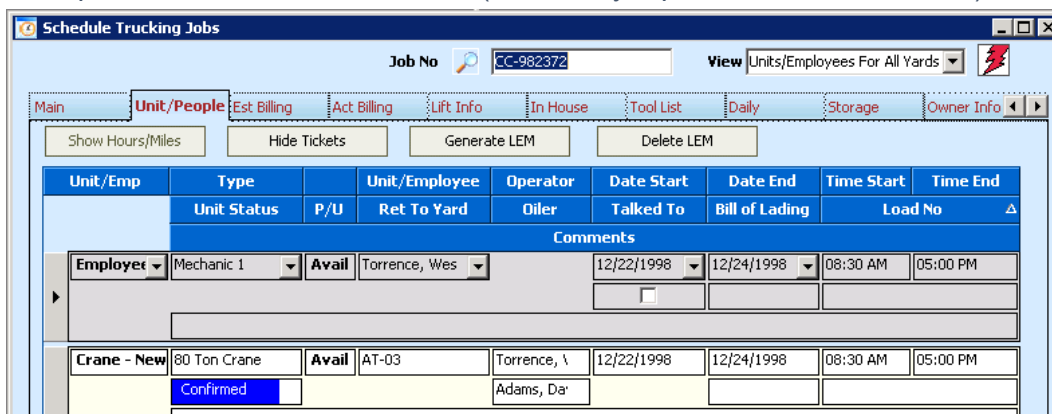
## Unit/People Tab

- 7. Click on **Add Unt/Ppl** from the dashboard toolbar, press CTRL + A, or right-click in any non-editable area of the window and select the option from the drop-down menu and the below will appear:



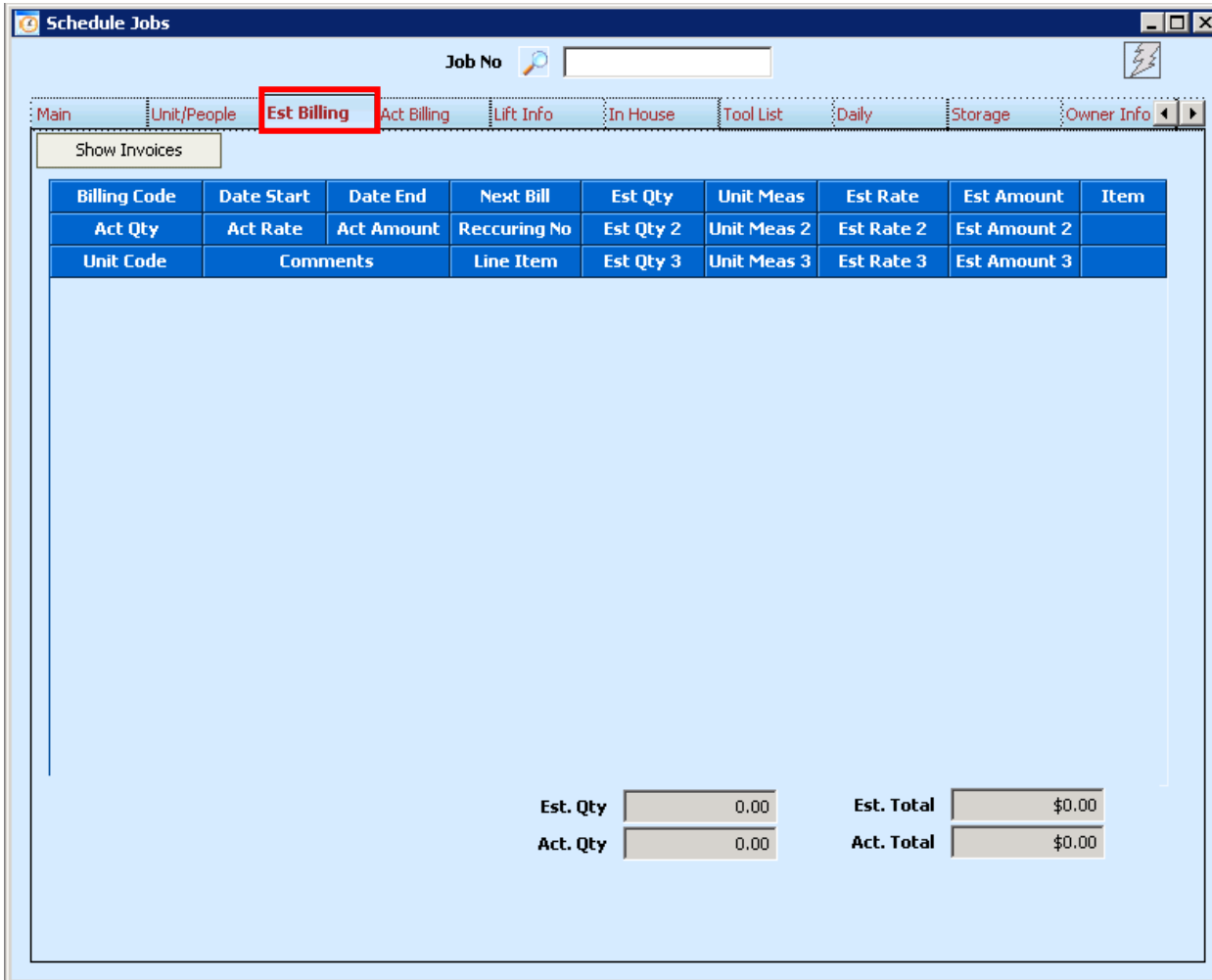


8. From the **Unit/Emp** drop-down box, select the desired entity.
9. From the **Type** drop-down box in the second column, select the type of unit or employee required.
10. From the **Unit/Employee** drop-down box in the third column, select the actual equipment or employee being assigned to job.
11. You can add multiple Unit/People from the drop-down that represents all aspects of the job by repeating steps 1 through 4.
12. Here is an example of what this would look like (this is only representative information).

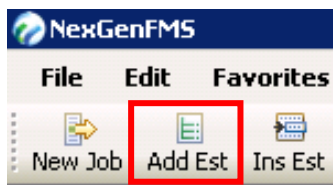


## Est Billing Tab

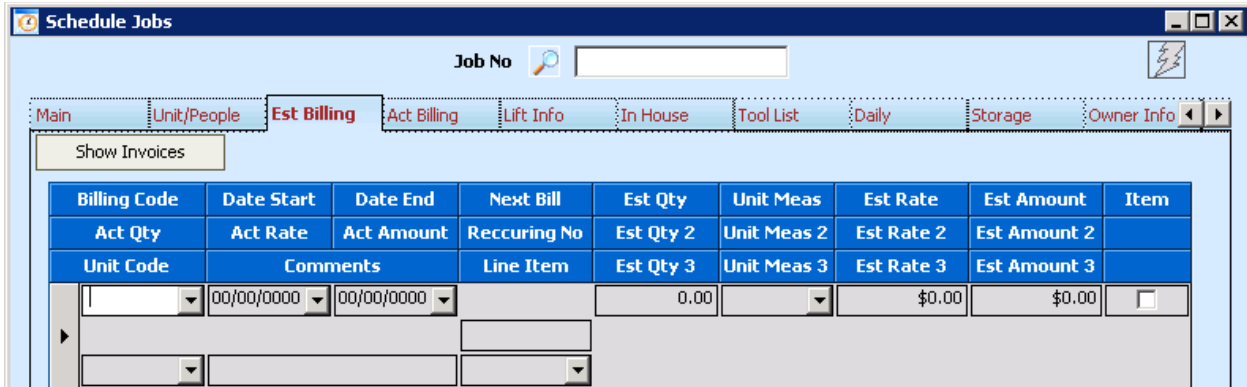
The Est Billing tab, or Estimated Billing, is used to record the planned labor, units, billing codes, and cost of the job. This information is carried through to the invoice.



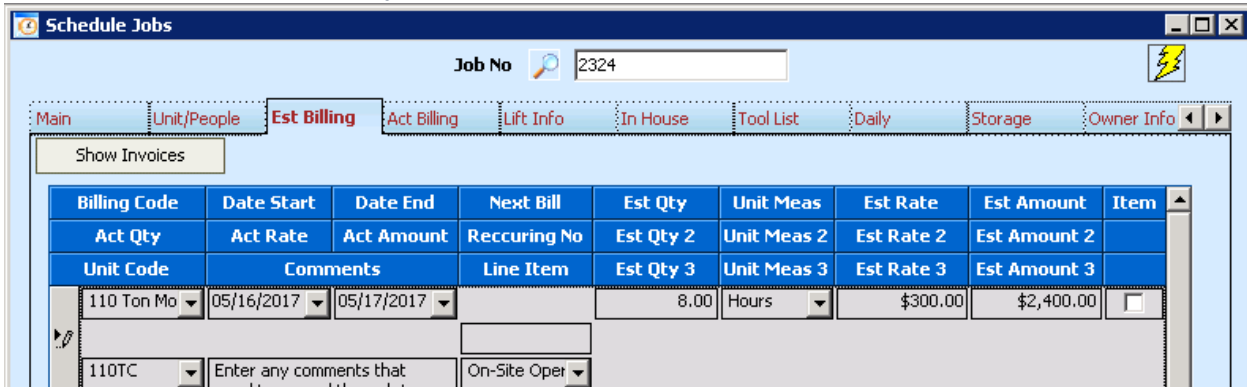
To add a new estimate item, click on **Add Est** or hit CTRL + A.



The following will appear:



8. Select the appropriate **Billing Code**.
9. Select the **Date Start** and **Date End** dates that coincide with the specific billing code.
10. Enter the estimated quantity in **Est Qty** and select the unit of measure from **Unit Meas**.
11. Enter the **Est Rate** if it is not auto-populated.
12. Select the **Unit Code**, if any, associated with the billing code. This field will only have selection options if units are identified in the **Unit/People** tab.
13. Enter **Comments** associated with the billing code. These comments carry through to the invoice.
14. If applicable per internal policy, select the appropriate **Line Item**.



15. Repeat these steps for each billing code. If recurring billing is applied, additional information will be present (Recurring No) will be filled.

Note: Information entered on this screen carries through to billing. It is very beneficial to fill each record completely, to provide the clearest intent for Accounts Receivable. Additionally, filling these prior to job execution reduces the review process time requirements.

## Lift Info Tab

This information is used to record dimensional information for the truck(s).

The screenshot shows a software window titled "Schedule Jobs" with a "Job No" field containing "2324". A navigation bar at the top includes tabs for "Main", "Unit/People", "Est Billing", "Act Billing", "Lift Info" (highlighted with a red box), "In House", "Tool List", "Daily", "Storage", and "Owner Info".

The "Lift Info" section contains two columns of input fields:

- Left column: Lift Radius, Height, Crane Capacity, Pieces, Total Weight.
- Right column: CWT Config., Boom Length, Set Back Fr. Bldg., Radius, test height.

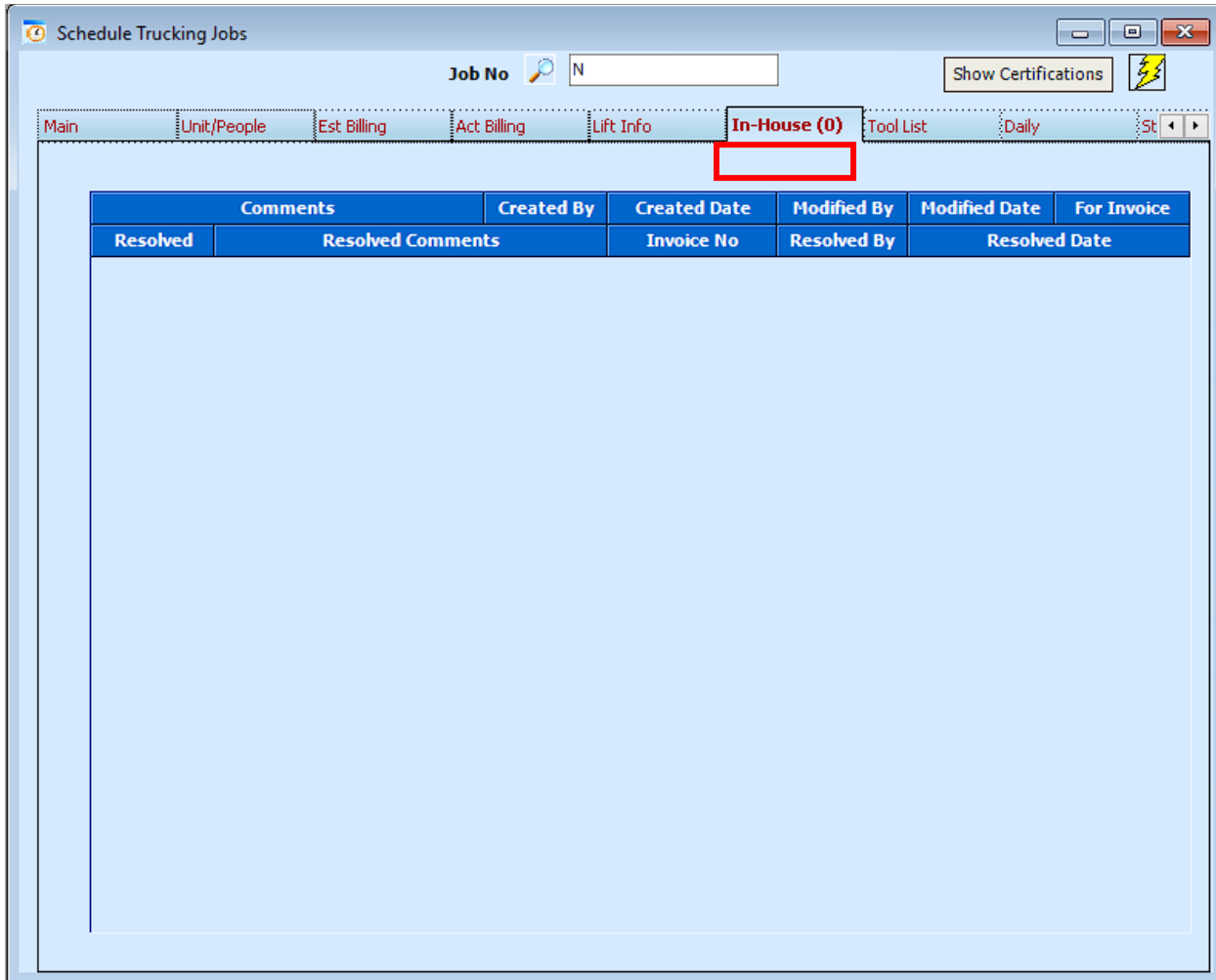
The "Trucking Info" section, located below and highlighted with a red box, contains a single column of input fields:

- Length
- Width
- Height
- Pieces
- Total Weight

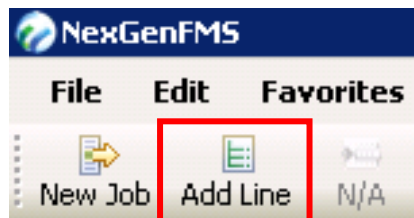
This tab is dual-purpose. For trucking, the lower box, titled Trucking Info is used to record detailed load information. All fields are optional and are intended to provide the driver with more information.

## In House Tab

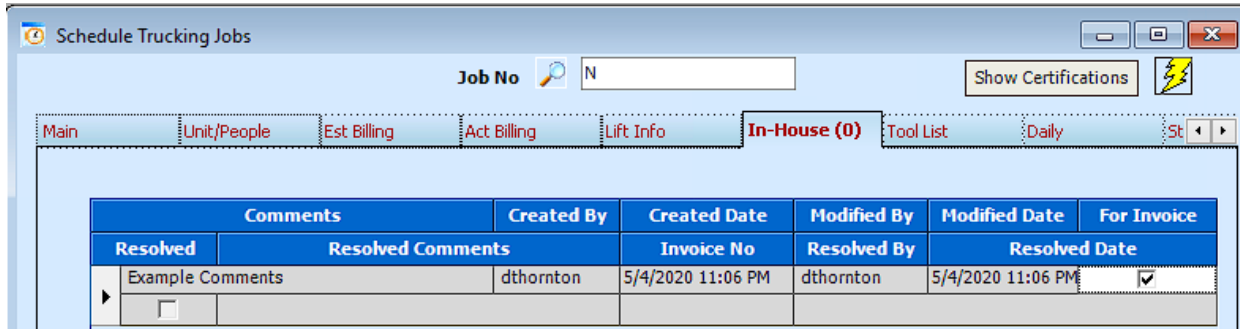
The In House tab is used to record in-house comments used to track the progression of a job. For instance, a user can record the details of any conversation or email correspondence here and can build a log of such conversations for future reference. The advantage to the In House comments is the time stamp capability. This saves time when entering information.



Click on Add Line, press CTRL + A, or right-click in any non-editable area of the window and select the option from the drop-down menu to add a new comment.



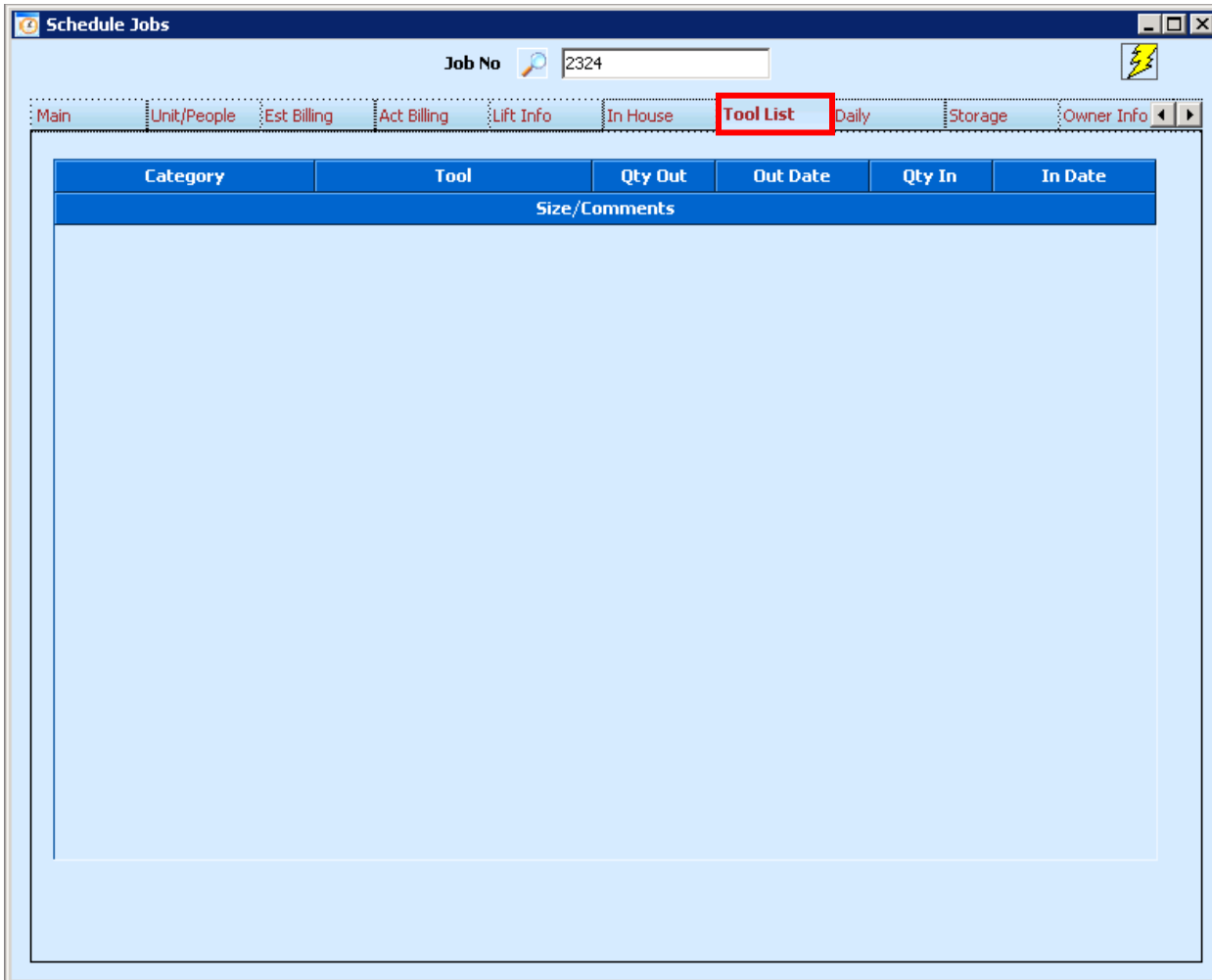
After adding a new line, enter any comments relevant to the job and click Save on the dashboard toolbar. If a comment is intended for billing, check the column titled 'For Invoice'; this will pass the message to billing when an invoice is generated. Billing will then, in their workflow, check 'Resolved' to indicate that the comment was acknowledged and to populate the specific 'Invoice No' the comment was addressed on and may add additional comments related to the resolution.



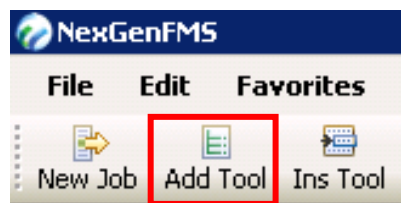
CTRL + S and the right-click technique will also save the job.

### Tool List Tab

This tab provides a listing of any non-serialized, but accountable tools that may be used on a job. For example, most rigging does not have serial numbers, but must be accounted for. These items should be tracked on this tab.

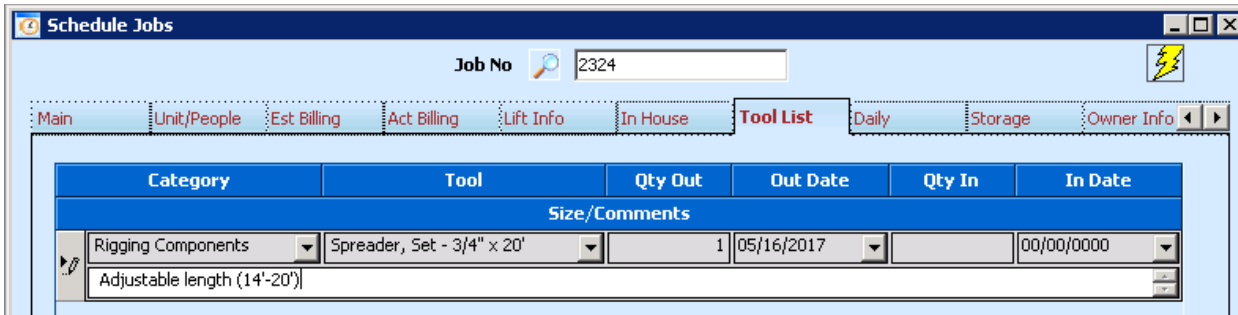


To add a new tool to the list, select Add Tool on the dashboard toolbar.



1. Select a Category from the drop-down menu.
2. Select a Tool from the drop-menu.
3. Enter the Qty Out and Out Date.
4. When the tool is returned, add the Qty In and In Date to update the record.
5. The Size/Comments field may be used to enter specific details about the tool. For example, rigging may be identified as a tool, and the size of the rigging would be added as a comment.

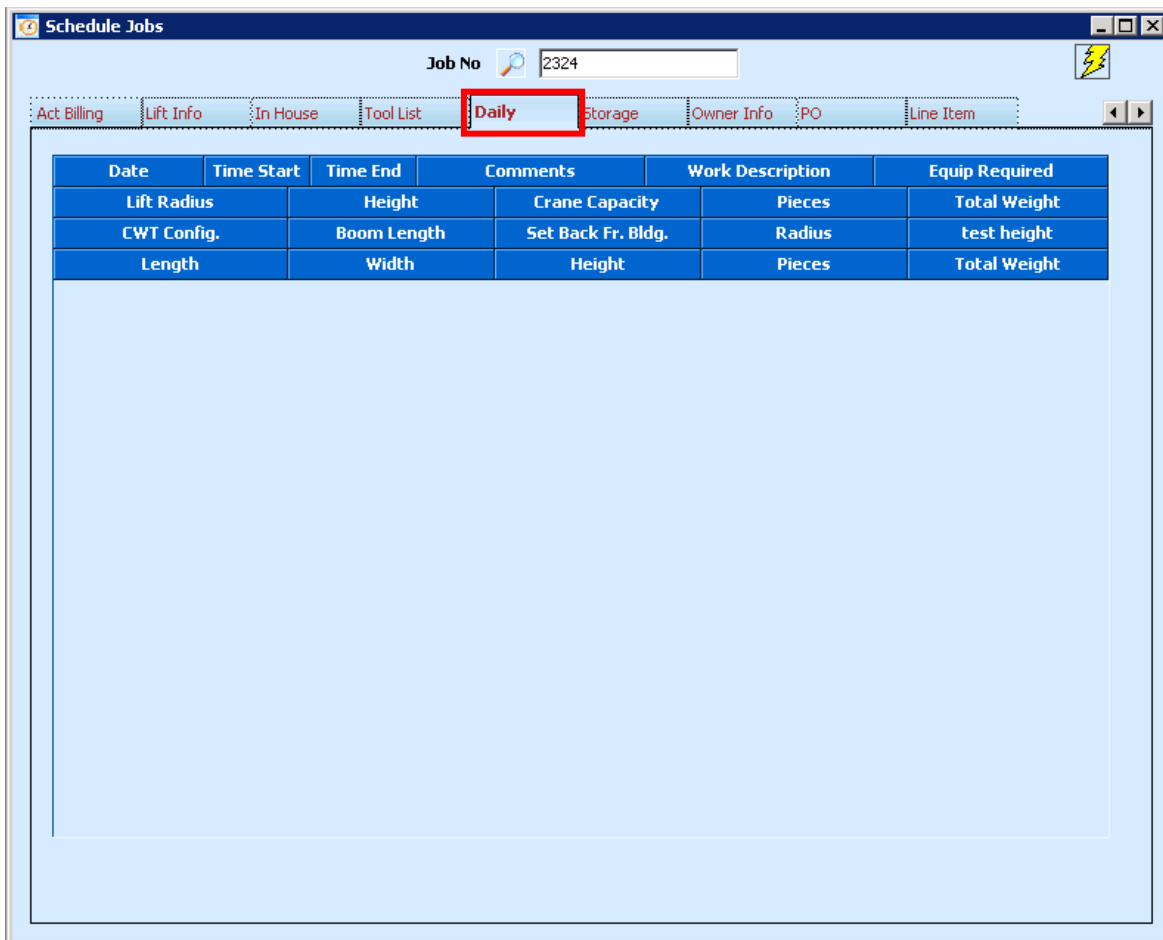




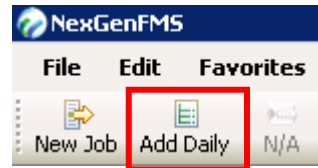
6. Repeat steps 1 through 5 for each tool associated with the job.

## Daily Tab

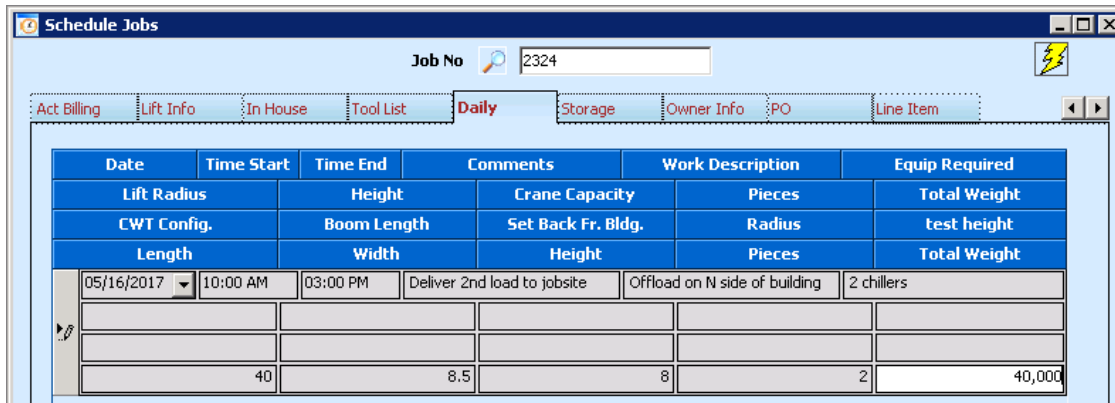
The Daily tab allows for a more granular approach to job information. Details can be added for specific job dates to ensure the operator or driver has information that is specific for a given scope of work, even when on a complex project. This tab will only be used when applicable.



Select Add Daily on the dashboard toolbar, type CTRL + A, or right-click in any non-editable area of the window and select the option from the drop-down menu.



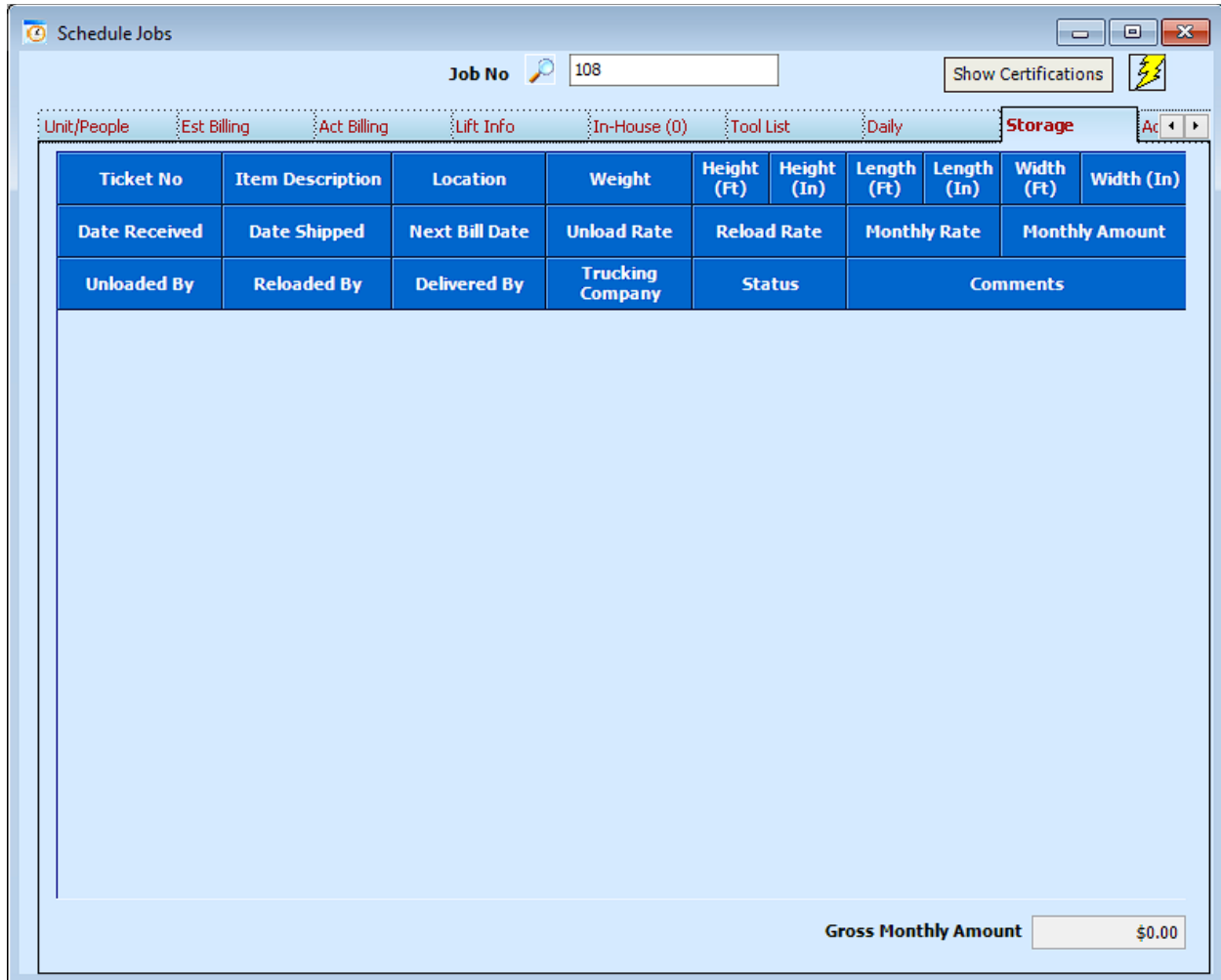
Fill each field as it pertains to the specific date of work. The bottom row of fields is used specifically for trucking.



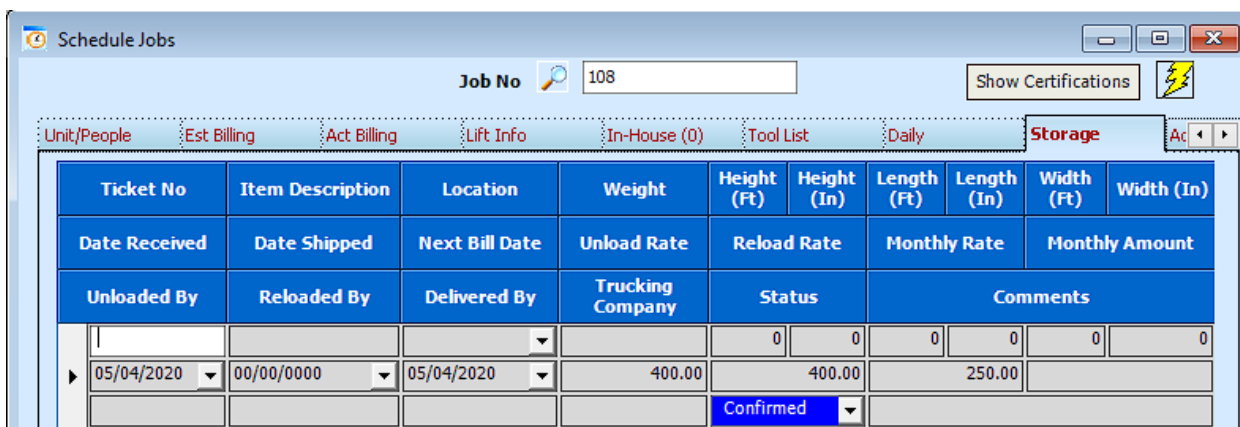
The information provided on this tab overrides job-level details.

### Storage Tab\*

This **Storage** tab is an optional tab and may or may not be present. This tab is used for inventory control of stored items like mechanical units, telecommunications units, or other customer-related items.



Begin by selecting **Add WH**, pressing CTRL + A, or right-clicking in any non-editable area of the window and select the option from the drop-down menu. Through the admin menu, settings can be defined to set costing associated with unloads and reloads.



1. Enter a **Ticket No**. This number is arbitrary and should be used to refer to the specific item. This number must be unique in regards to the specific job. A best-practice would be to always order tickets

incrementally from 1. This allows for the following convention: Job No – Ticket No. For example, 2324-1 would represent the first ticket for job number 2324. Only the ticket number needs to be entered into this field.

2. **Item Description** is a comment field; enter specific details about the item.
3. **Location** refers to the physical location of the item on the premises. A best-practice would be to assign reference numbers or other identifiers to specific locations, like A-10 to better associate the item with a location.
4. Enter the **Weight, Height, Length, and Width** of the item.
5. Enter the **Date Received**.
6. When applicable, enter the **Unload Charge** and/or **Reload Charge**, unless internal policy follows different entry methods.
7. The **Unloaded By** is used to identify the personnel responsible for the unload.
8. The **Reloaded By** is used to identify the personnel responsible for the reload.
9. **Delivered by** refers to the shipping company that delivered the item to the yard.
10. **Trucking Company** refers to whom will be delivering the item to the customer.
11. **Status** works just like Jobs and is used to identify tentatively scheduled items or confirmed items.
12. **Comments** may be entered to better identify location, item description, or any other details about the storage item.
13. Repeat steps 1 through 12 for each new storage item.

## Owner Info Tab

The Owner Info tab is used for lien information and Owner-Controlled Insurance Program (OCIP) related projects. Only use this tab if the company does liens, pre-liens, Notice of Commencements, or OCIP jobs. This type of job requires additional reporting and may be filled out by an accounting representative when applicable.

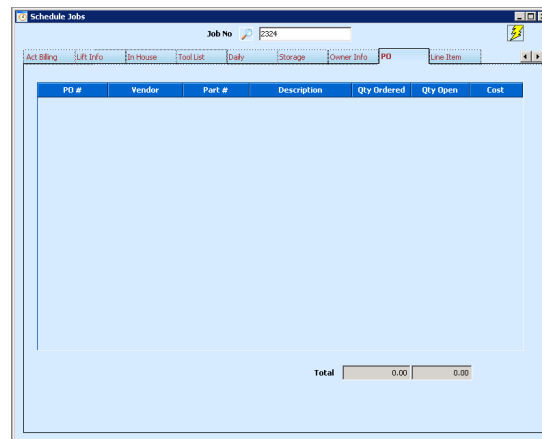
The screenshot shows the 'Schedule Jobs' application window. At the top, there's a 'Job No' field containing '2324'. Below it is a navigation bar with several tabs: 'Act Billing', 'Lift Info', 'In House', 'Tool List', 'Daily', 'Storage', 'Owner Info', 'PO', and 'Line Item'. The 'Owner Info' tab is selected. The main area contains a form with the following fields and options:

- Owner Same as Customer Address
- Owner Name: [Text Field]
- Address: [Text Field]
- City: [Text Field]
- State: [Dropdown Menu]
- Zip: [Text Field]
- Country: [Text Field]
- Phone: ( ) - Ext. [Text Field]
- Project No: [Text Field]
- Legal Description: [Text Area]
- OCIP:
- Pre-Lien Date: [Dropdown Menu] (05/15/2017)
- Pre-Lien Amount: [Text Field] (\$0.00)
- Lien Date: [Dropdown Menu] (05/15/2017)
- Lien Amount: [Text Field] (\$0.00)

Fill out each of the fields as appropriate, per organizational policy and check the **OCIP** checkbox if and when applicable. The **Project No** field may be used to record an internal project number that helps group jobs together when working on multi-phase or other large projects.

## PO Tab

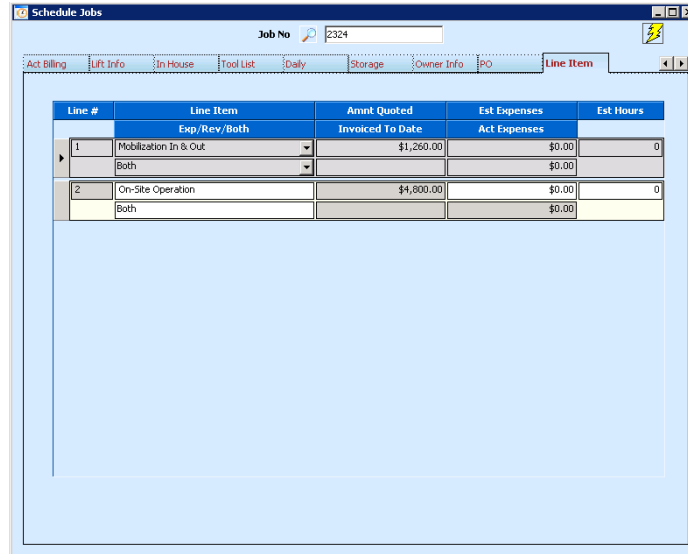
The PO tab is a reference tab that shows all POs associated with the job. New POs cannot be generated from this view. To create a new PO, select **Enter, PO Requisition** and fill-in the fields. This is also possible through Enter-> Purchase Orders, if the company allows. Refer to the How to Create a PO guide for more information.



When a PO exists for a job, and it has been assigned to the job, it will show up on this tab. If a PO is present, it can be double-clicked to bring up PO specific related details.

## Line Item Tab

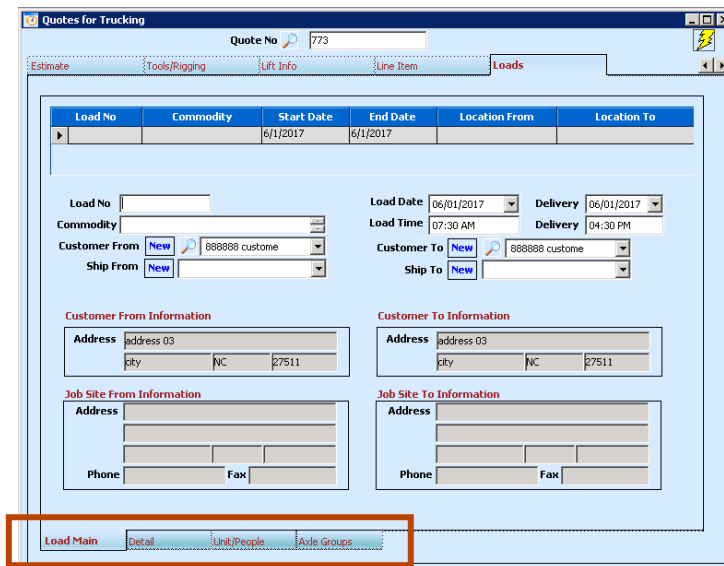
The Line Item tab is intended to be used as a reference tool, but can be modified when necessary. The records are populated based on selections in the Estimate tab, but if an error occurs regarding line items, refer to this tab to determine where the conflict resides. Line Items are used by project managers and management to breakout costs in specific ways like phases; or, for consolidation of billing items.



### Loads Tab\*

The Loads tab is used to identify the details of a load and facilitate the assignment of the load to a driver.

Begin by clicking on the Add Load ( ) button on the dashboard toolbar, or press CTRL + A.



**Note:** This tab has additional tabs! Look at the bottom of the window for additional tabs.

### Load Main Tab

1. Enter the **Load No.** This is an arbitrary number that must be unique for within the job.
2. Enter a **Commodity** description.
3. Select or add the **Customer From, Ship From, Customer To, and Ship To.**

4. Enter the **Load Date**, **Load Time**, **Delivery** date, and **Delivery** time.
5. Repeat steps 1 through 4 for each load.

### Load Detail Tab

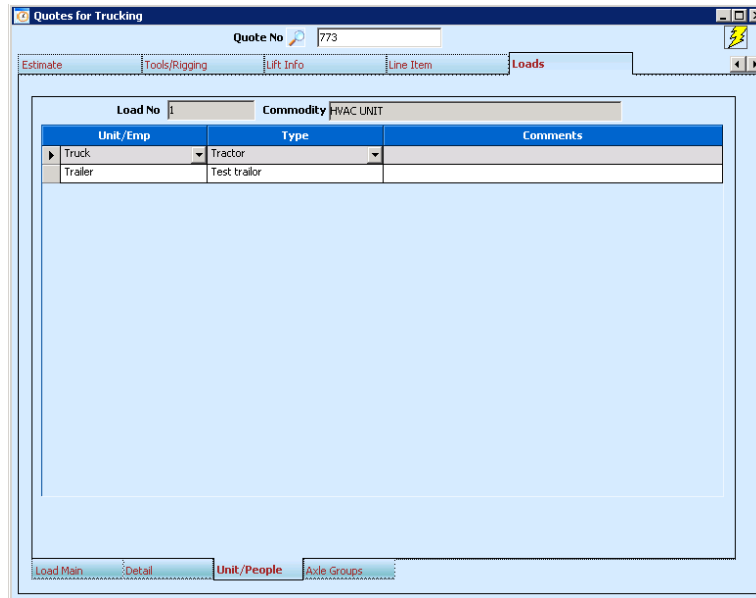
The Detail tab allows for entering details about the specific delivery.

Note: Notice the grayed-out fields at the top of the tab; these inform the user of which load and commodity are being modified by the proceeding fields.

1. Add details associated with **Permits**, **Comments**, **Directions**, and **Routing**.
2. Enter the **Commodity Weight**, **Width**, **Length**, and **Height**.
3. Enter the **Loaded Weight**, **Width**, **Length**, and **Height**.

### Load Unit/People Tab

The Unit/People tab associates the Load No with a schedule type and unit type.



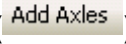
Begin by clicking the Add **Unt/Ppl** () button on the dashboard toolbar, or press CTRL + A.

1. Select the schedule type by clicking the **Unit/Emp** drop-down menu.
2. Select the unit type by clicking the **Type** drop-down menu.
3. Add any Comments as appropriate.

### Load Axle Groups Tab

The Axle Groups tab allows for the entry of axle weights.

Begin by entering the Steering Weight and Drive Weight of the load.

1. Click on **Add Axles** () button, or press CTRL + A to add a trailer group.
2. Enter the **Trailer Group** number and **Axle Weight** as appropriate.
3. Repeat steps 1 and 2 until all trailer groups are identified.
4. Click Save on the dashboard toolbar.

After all information has been entered, the Load No will populate on the appropriate unit on the Unit/People tab of the Quotes for Trucking window.

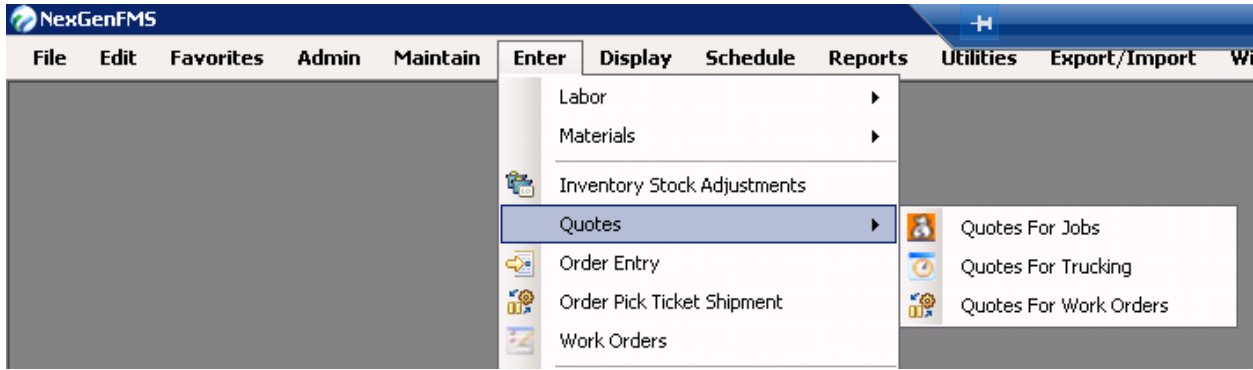
Quotes may be emailed directly from NexGen using the built-in email utility.

### Converting a Job Quote

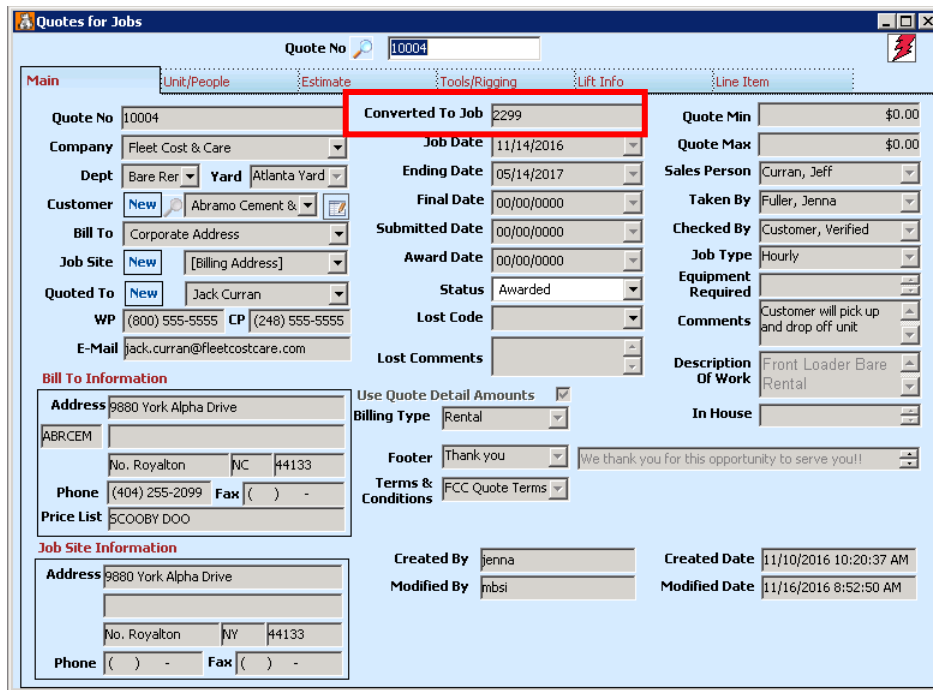
After a salesperson has generated a quote and the customer is ready to schedule there is no reason to duplicate effort. All information from a quote can be carried over to a job with the click of a button.

Start by opening a quote from the menu bar:






The above screen shot shows the navigation from Enter -> Quotes -> [any of three options]. These options are generally user-specific. Each window is almost identical to their Schedule equivalents. Select the appropriate option to open the Quote window.



If a quote has already been converted to a job, it will appear grayed-out. This is to show that no changes can be made to the quote and all changes must occur in the job instance. Refer to the **Converted To Job** field for a job number reference.

If the quote has not already been converted, do a quick review of the information and fill in any gaps that can

be filled. Once satisfied, click on the Conv Job (  ) button on the toolbar. This will bring up a prompt to confirm the action:



This window helps to ensure the correct quote is being converted; note the quote number in the dialog box. The next action to occur is a new window showing the **Schedule Jobs** interface and a dialog box prompting for job times. Follow the instructions, review the information, and click **Save** on the toolbar. A few fields are not available in the Quote window that are present in the Schedule Jobs window. Now is a good time to add information to these fields, including **PO** number, job times, travel time adjustments, specific employee and unit assignments, and **Report To** contact.

## HOW TO GENERATE A TICKET

The concept of ticket generation is that the dispatcher saves an instance of a ticket and that action triggers a process of submitting information to the ticketed individual's device, notifying the user of the action allowing the user to view the pertinent details of the job. It also facilitates the tracking of information on the job site by allowing the end-user the ability to set timestamps, add notes, and obtain signatures. This information, once saved, is then forwarded back to the server for record keeping and further actions including invoicing, labor approval, and maintenance.

### Generate Ticket From Schedule Jobs Window

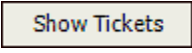
How to Generate a Ticket

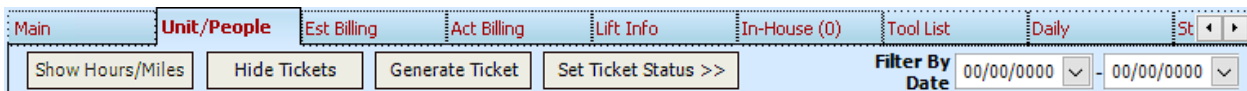
The concept of ticket generation is that the dispatcher saves an instance of a ticket and that action triggers a process of submitting information to the ticketed individual's device, notifying the user of the action allowing the user to view the pertinent details of the job. It also facilitates the tracking of information on the job site by allowing the end-user the ability to set timestamps, add notes, and obtain signatures. This information, once saved, is then forwarded back to the server for record keeping and further actions including invoicing, labor approval, and maintenance.

1. Navigate to Schedule Job by selecting the Schedule Job option from the menu toolbar or double-clicking the unit in the Unit Schedule or Unit Employee Schedule.
2. Select a unit from the Unit/People tab of the Schedule Job window.

Unit/Emp	Type	Unit/Employee	Operator	Date Start	Date End	Time Start	Time End
Crane - New des	50 Ton Crane	Avail 01-0134AS	Baker, Terry	07/02/1999	06/02/2015	08:30 AM	05:00 PM
	Confirmed						
	test						
Truck	Truck	Avail 2001'	Torrence, Wes	12/16/2013	12/16/2013	08:30 AM	05:00 PM
	Confirmed						
Employee	Driver	Avail Lauer, Joe M		05/02/2015	05/02/2015	08:30 AM	05:00 PM

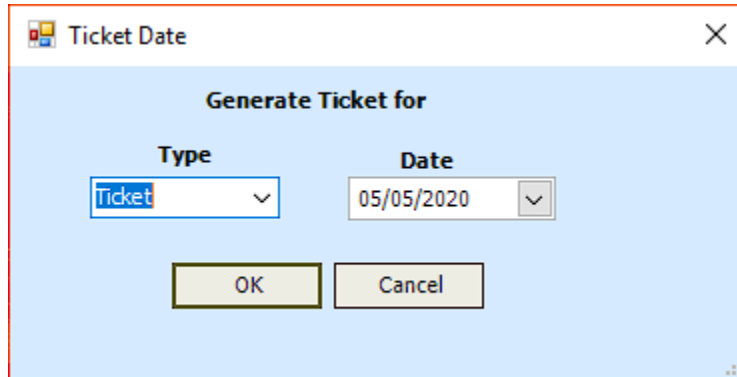
Note: This selection can only function on a unit and not on an employee; an employee must be assigned to the unit prior to generating a ticket.

3. Verify all information associated with the unit, employee, and job.
4. Click Show Tickets.  The button options will update and look like this:



5. Click Generate Ticket. 

- Review the information in the dialog box that appears; this information is consistent with the original entered information but can be manipulated for specific circumstances.



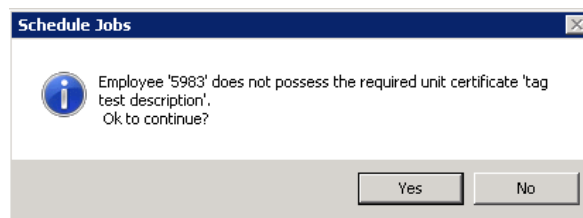
- A table row will appear at the bottom of the Unit/People tab showing some details associated with the job. This is the instance of the ticket within the database.

Hide Cancelled Tickets <input type="checkbox"/>							
Ticket No	Date	Type	Start Time	End Time	In Yard Time	Comments	Status
▶	05/05/2020	Operator	07:00 AM	03:30 PM			Not Sent

**Information is representative only**

Note: The ticket is not generated at this point. No information has been committed to the database and no information has been forwarded to the affected employee until this process is complete (note the 'Not Sent' in the Status column). At this point, if an adjustment needs to be made to the Date or Start Time, you may adjust. Once saved, this information may not be modified.

- Click Save on the menu toolbar.



Note: Often times, one or more dialog boxes may appear to notify the user that a constraint has been violated. Acknowledge such messages before proceeding.

Hide Cancelled Tickets <input type="checkbox"/>							
Ticket No	Date	Type	Start Time	End Time	In Yard Time	Comments	Status
▶ 9504	05/05/2020	Operator	07:00 AM	03:30 PM			Sent

**Note:** Notice the addition of “9504” in the above example, this is the databases reference to the specified ticket. This same number will persist for this ticket moving forward, on both NexGen and Atom. The Status has also

updated to 'Sent', this is to indicate that NexGen has forwarded the ticket to the specified employee's mobile device. A full listing of statuses that may appear in this column include the following:

Not Sent	Ticket has not been sent to the user(s)
Sent	Ticket has been sent to all users
Viewed	Primary employee has viewed the ticket in the ticket queue in Atom
Downloaded	Primary employee has downloaded the ticket in Atom
Started	Primary employee has tapped the 'Start Time' button in Atom
Left Yard	Primary employee has tapped the 'Left Yard' button in Atom
First Signature	Primary employee has saved the first signature from the customer; tickets with a first signature may not be cancelled. If a ticket is cancelled before this point and the employee is actively working in the ticket, it will not prevent them from moving forward with the ticket. After the ticket is saved, it will reinstate the ticket in NexGen. This is to avoid a scenario where an employee's ticket is cancelled, and they can no longer record information about the job because no new ticket was received.
Second Signature	Primary employee has saved the second signature from the customer
Left Job	Primary employee has tapped 'Left Yard'
Arrived Yard	Primary employee has tapped 'Arrived Yard'
Finished	Primary employee has tapped 'End Time'
Completed	Primary employee has tapped 'Complete Ticket' in the overflow menu or Dispatch has manually updated the status to Completed to finish the workflow
Cancelled	Dispatch has cancelled the ticket through NexGen or Atom

9. Notify the employee. This step is very dependent on organizational policy and a process/procedure should be addressed and defined prior to committing to ticket generation.

When a ticket is cancelled or completed, NexGen will automatically generate a pdf copy of the e-ticket. This preserves the content and layout of the e-ticket at the time the customer signed it. These pdf copies may be viewed in the File Links option (lightning bolt icon).

The screenshot shows a software window titled "Maintain File Links - Job" with a job ID of "Job-9993333" and a "View" dropdown set to "E-Tickets". The table below displays two cancelled e-tickets with their respective file names, statuses, and creation/modification dates.

File Name	Envelope Status	Created By	Modified By
Comments	Available On Tickets	Created Date	Modified Date
\\TESTSQL01\TS05Data\FileLinks\9500 - Cancelled.pdf		mbsi	mbsi
E-Ticket # 9500 - Cancelled	<input type="checkbox"/>	5/5/2020 12:25 PM	5/5/2020 12:25 PM
\\TESTSQL01\TS05Data\FileLinks\9501 - Cancelled.pdf		dthornton	dthornton
E-Ticket # 9501 - Cancelled	<input type="checkbox"/>	5/5/2020 2:03 PM	5/5/2020 2:03 PM

All e-tickets will begin with “E-Ticket # [ticket number]”; if cancelled, they will have “– Cancelled” appended to the ticket Comments. This feature only saves the e-ticket and not the associated Checklists or Hours & Miles tabs of the ticket.

Note: if you can’t see the e-tickets, change the **View** in the top-right of the screen to ‘E-Tickets’.

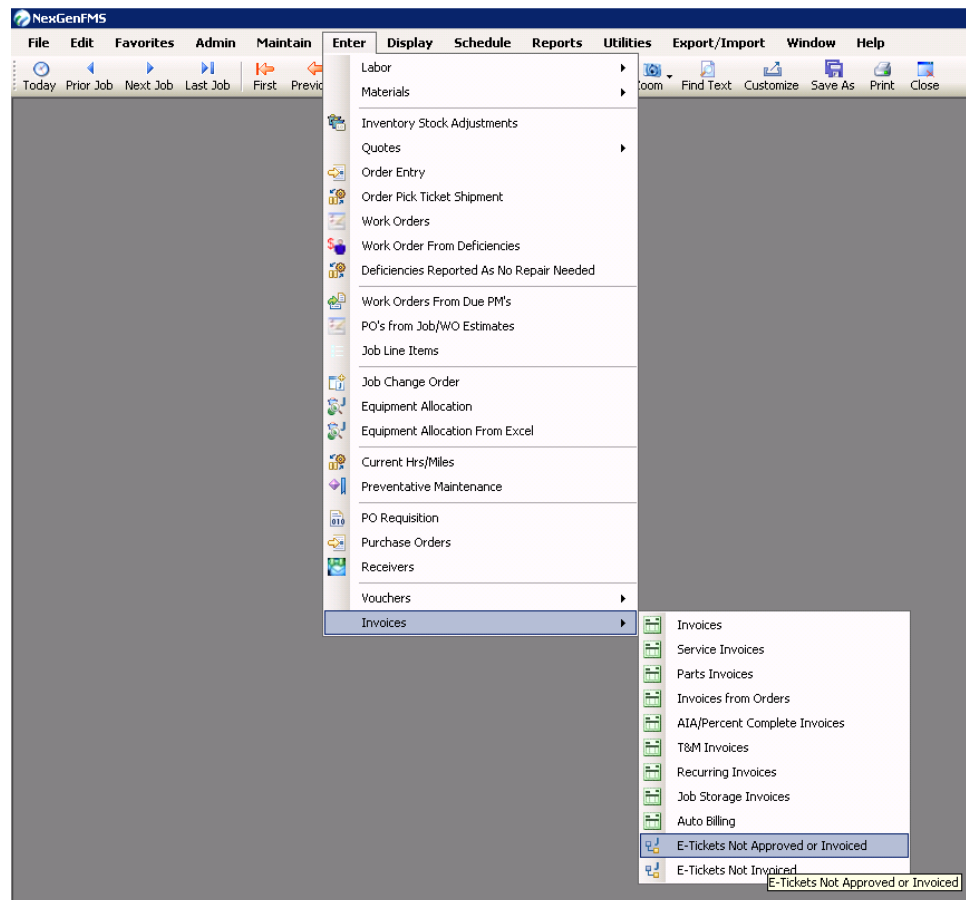
Note: Ticketing can be done manually (paper) or electronically (e-ticket). When e-tickets are generated, a notification icon will appear on the Jobs icon within Atom but will not send push notifications to the device owner. One practice for notification is to use the internal email utility of NexGen to generate an email and send to the employee. This is dependent on the employee’s access to email and organizational policy for acknowledging such means of communication.

## HOW TO REVIEW TICKETS

After a ticket has been completed by an employee, it is necessary to review their job and labor information from their e-ticket, approve it, and forward the information to other departments. This guide will cover the review portion of this process.

### E-Ticketing Not Approved or Invoiced

1. Open E-Tickets Not Approved or Invoiced. To navigate to this screen, select Enter from the menu toolbar, select Invoices, and E-Tickets Not Approved or Invoiced.



E-Tickets Not Approved or Invoiced

Company: Fleet Cost & Care | Yard: Atlanta Yard | Department: All Departments | View By: All | View

View Job | View Ticket

WTL - Worked Through Lunch

Ticket No	Type	Date	Job	Job Start	Job End	Actual Time	Unit	Employee	WTL	ST	OT	DT	Status	Billing Comments
Left Yard	Arrived Job	Left Job	Arrived Yard	Customer	Customer	Job Site				Ticket Comments				
671	LEH	02/27/2015	186	02/27/2015	03/05/2015	00:05 Hrs	Crane Village	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Approved	
672	LEH	03/13/2015	188	03/12/2015	10/01/2015	00:01 Hrs	All Erection & Crane Rental	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	Customer damage to front outrigger box.
684	LEH	06/09/2015	188	03/12/2015	10/01/2015	00:12 Hrs	Atlanta Falcons Stadium	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	
819	LEH	08/24/2015	200	08/20/2015	12/18/2015	00:02 Hrs	Atlanta Falcons Stadium	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	
805	Operator	10/12/2015	200	08/20/2015	12/18/2015	00:06 Hrs	Harvey Electric	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	[Billing Address]
914	Operator	10/27/2015	200	08/20/2015	12/18/2015	00:02 Hrs	Harvey Electric	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	[Billing Address]
948	Operator	11/12/2015	200	08/20/2015	12/18/2015	00:07 Hrs	Harvey Electric	Fuller, JennaMary	<input checked="" type="checkbox"/>		0.00	0.00	Not Approved	[Billing Address]
911	Operator	10/23/2015	209	10/23/2015	10/23/2015	00:05 Hrs	Harvey Electric	Fuller, JennaMary	<input checked="" type="checkbox"/>		0.00	0.00	Not Approved	[Billing Address]
977	Operator	11/24/2015	212	2:17 PM	01/11/2016	00:09 Hrs	Stadium Constructors Inc	Fuller, JennaMary	<input checked="" type="checkbox"/>		0.00	0.00	Not Approved	left at 8
993	LEH	12/02/2015	214	10:22 AM	12/17/2015	00:00 Hrs	Georgia Power Works	Blestow, BrynnNacole	<input type="checkbox"/>		0.00	0.00	Approved	Testing
1093	Operator	02/23/2016	215	11/16/2015	07/26/2017	00:06 Hrs	Atlanta Falcons Stadium	Fuller, JennaMary	<input checked="" type="checkbox"/>		0.00	0.00	Not Approved	
1090	Operator	02/18/2016	221	12:28 PM	12/31/2016	00:10 Hrs	Steel Erecting Specialists	Fuller, JennaMary	<input checked="" type="checkbox"/>		0.00	0.00	Not Approved	
1577	LEH	11/07/2015	221	11:48 AM	12/31/2015	00:01 Hrs	All Erection & Crane Rental	Blestow, BrynnNacole	<input type="checkbox"/>		0.00	0.00	Not Approved	
1044	Operator	12/21/2015	223	2:29 PM	01/09/2016	00:02 Hrs	All Erection & Crane Rental	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	
1043	Load	12/21/2015	224	3:40 PM	12/24/2015	00:01 Hrs	Steel Erecting Specialists	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	
1038	Operator	12/22/2015	224	3:35 PM	12/24/2015	00:00 Hrs	Atlanta Falcons Stadium	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	Not Approved	
1289	Operator	06/03/2016	2261	12:21/2015	06/10/2016	01:28 Hrs	Highlands Elementary School	Fuller, JennaMary	<input checked="" type="checkbox"/>		0.00	0.00	Not Approved	yo yo yo yo

The E-Ticket Not Approved or Invoiced window will return a list of completed jobs that have not yet been invoiced. To narrow a search and simplify the navigation, the window offers a **View By** drop-down option at the top. The drop-down, by default has three options: **All**, **Not Approved**, and **Approved**; but is user-definable, which will help organize tickets. The E-Ticket Not Approved or Invoiced window shows a series of fields that are populated by each E-Ticket.

2. Double-click on an E-Ticket instance.

914	Operator	10/27/2015	200	08/20/2015	12/18/2015	00:02 Hrs	110MH03	Fuller, JennaMary	<input type="checkbox"/>		0.00	0.00	0.00	Not Approved
10:47 AM	10:47 AM	10:47 AM	10:49 AM	Harvey Electric	[Billing Address]									

This will open the E-Ticket form where job details may be reviewed, and timestamps validated.



Atlanta Yard  
333 Evans Road  
Ranger, GA 30734  
Ph. \_\_\_\_\_

Page 1 of 4

Date Tuesday, October 27, 2015 Job No 200 Ticket No 914

PO # \_\_\_\_\_ Terms: \_\_\_\_\_  
Sales Person Torrence, Wes Phone (404) 255-2099  
Customer Harvey Electric Phone (313) 263-2914  
Address 4160 7th Street City, State Zip Wyandotte, MI 48192

Job Site [Billing Address] Phone (313) 263-2914  
Address 4160 7th Street City, State Zip Wyandotte, MI 48192

Directions \_\_\_\_\_  
Alt Phone \_\_\_\_\_  
Report To John Doe CP WP E-Mail jenna@fleetcostcare.com  
Ordered By John Doe CP WP E-Mail jenna@fleetcostcare.com

Work Description \_\_\_\_\_  
Comments \_\_\_\_\_  
Equipment Crane - Ne 110 Ton Hyd Trk 110MH03  
Employees Operator, 1st class - Fuller, Jenna Mary Oiler - VanPelt, Ken

Equip Required \_\_\_\_\_

Have Signed At Start of Job The following terms and conditions governing this rental are understood and agreed to .

Accepted Terms and Conditions.  
Signer's Name John Doe / Harvey Electric

Date 10/27/2015 10:47 AM By \_\_\_\_\_  
Authorized Signature \_\_\_\_\_

Atlanta Yard  
333 Evans Road  
Ranger, GA 30734  
Ph. \_\_\_\_\_

Page 2 of 4

Date Tuesday, October 27, 2015 Job No 200 Ticket No 914

Time Left Yard 10:47 AM Time Left Job 10:47 AM  
Time Arrived Job 10:47 AM Time Arrived Yard 10:49 AM

Signer's Name \_\_\_\_\_ The above hours are verified to be correct

Worked Through Lunch  
Signer's Name John Doe / Harvey Electric

Date 10/27/2015 10:47 AM By \_\_\_\_\_  
Authorized Signature \_\_\_\_\_

Ticket Comments \_\_\_\_\_

**Terms & Conditions**  
MICHIGAN  
THE INDIVIDUAL SIGNING HAS BEEN GIVEN AUTHORITY TO EXECUTE THIS AGREEMENT.  
AS STATED BY LAW, THE LESSEE RECOGNIZES THAT ALL RIGGER, AND SIGNAL PERSONS, SHALL BE QUALIFIED PRIOR TO START OF ANY AND ALL OPERATIONS.

1. INDEMNIFICATION - To the fullest extent permitted by law, Lessee agrees to indemnify and save Lessor, its employees and agents harmless from all claims for death or injury to persons, including Lessor's employees, of all loss, damage or injury to property, including the equipment, arising in any manner out of Lessee's operation. Lessee's duty to indemnify hereunder shall include all costs or expenses arising out of all claims specified herein, including all court and/or arbitration costs, filing fees, attorney's fees and costs of settlement. Lessee shall be required to indemnify Lessor for Lessor's own negligence or fault, whether the negligence or fault of the Lessor be direct, indirect or derivative in nature. However, the Lessee shall not be required to indemnify Lessor for any claim caused by or resulting from the sole negligence or willful misconduct of the Lessor, the Lessor's agents, servants, or independent contractors who are directly responsible to the Lessor. The indemnification above shall not be limited in any way by any limitation on the amount or type of damage, compensation or benefits payable by or for the Lessee under workers' compensation acts, disability benefits acts, or other employee benefits acts. The Lessee's obligations hereunder shall further not be limited by the amount of its liability insurance and the purchase of such insurance for Lessor not operate to waive any of the above obligations. This provision is separate and distinct from any other provision or paragraph in this contract, including any provision or paragraph concerning partial indemnification or procurement of insurance. If any word, phrase, or sentence of this paragraph or any other paragraph is declared invalid, then all other words, phrases, or sentences of all paragraphs of this contract shall stand. If this paragraph or any other paragraph is declared invalid, then all other paragraphs of this contract shall stand.

2. INSURANCE -The Lessee agrees to purchase the following insurance coverages prior to the equipment's arrival on the job site. The Lessee shall procure the following coverages for Lessor: a) worker's compensation and employer's liability insurance, with limits of at least the statutory minimum or \$1,000,000, whichever is greater, b) primary non-contributory commercial general liability insurance on an occurrence basis, including bodily injury and property damage coverage with minimum limits of \$1,000,000 per occurrence and \$2,000,000, in the aggregate, c) excess/umbrella non-contributory insurance in the amount of at least \$5,000,000 and Lessee's primary and excess/umbrella policies must be endorsed so that they are primary and non-contributory to all of Lessor's insurance policies, d) inland marine/all-risk physical damage insurances, on a primary non-contributory basis, to cover the full insurable value of the equipment, including any boom or jib, for its loss or damage from any and all causes, including, but not limited to, overloading, misuse, fire, theft, flood, explosion, overturn, accident, and acts of God occurring during the rental term, e) the Lessor to be named as an additional insured on all liability insurance policies, including excess/umbrella policies (ISO Form CG 20 10 10 01 and ISO CG 20 37 10 01 must be used), and Lessee shall provide all insurance certificates to Lessor when requested.

Note: This is an example e-ticket from a job ticket; LEMs and trucking tickets are similar in layout and the process is the same.

- Review the labor, meals, travel, loadouts, and any other aspect required by organizational policy and summarize findings in the Billing Comment field of the E-Tickets Not Approved or Invoiced window.

Ticket No	Type	Date	Job	Job Start	Job End	Actual Time	Unit	Employee	WTL	ST	OT	DT	Status	Billing Comments
Left Yard	Arrived Job	Left Job	Arrived Yard	Customer	Customer	Job Site				Ticket Comments				
671	LEM	02/27/2015	186	02/27/2015	03/05/2015	00:05 hrs		Fuller, Jenna/Mary		0.00	0.00	0.00	Approved	
11:05 AM	11:05 AM	11:09 AM	11:10 AM	All Erection & Crane Rental	Crane Village			Customer damage to front outrigger box.						

- To ensure Billing knows that the E-Ticket is ready to be invoiced, select Approved in the Status drop-down. If, after review, it is determined that the job is waiting on information like a PO or costing detail, the Status can be updated to something more appropriate.

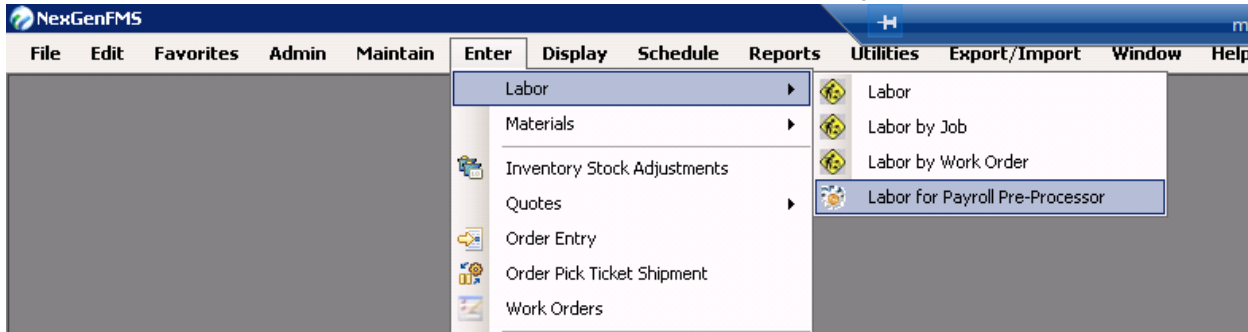
Note: The Status column is filterable. This allows different approving entities to focus on just those jobs that are ready for them to review. Determining what statuses to have in the drop-down will need to be a matter of policy within the organization.

## HOW TO REVIEW LABOR

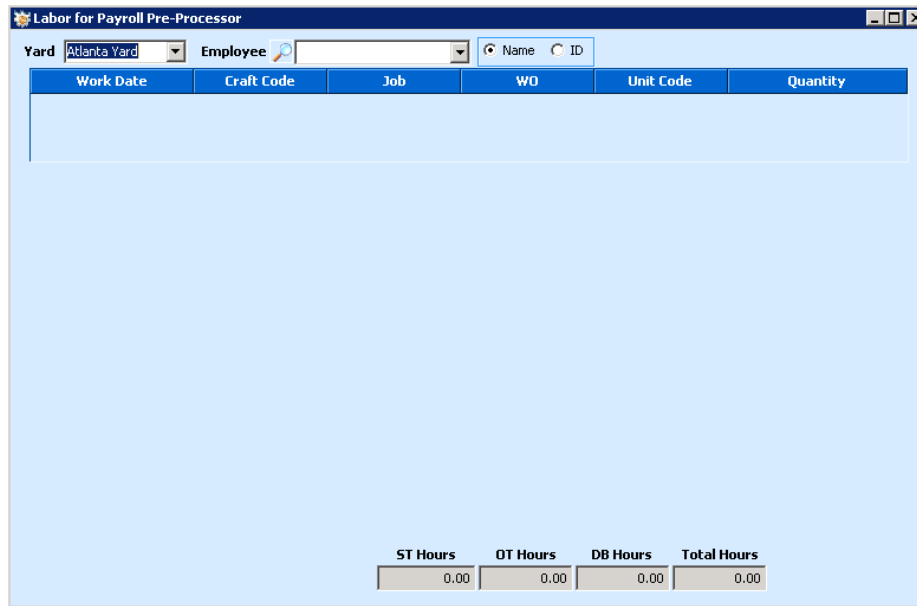
It is a best practice to conduct labor review at the same time as job review. This ensures that information is current and non-recorded details can be applied to the approval process. This also minimizes the risk of missing specific labor entries and delaying payroll processing.

### Labor Review using the Payroll Pre-processor

1. From the dashboard, select Enter -> Labor -> Labor for Payroll Pre-Processor



The following window will appear:



2. Select an Employee and the following changes will appear in the window:

1. The **Work Date** field should be pre-populated from the employee’s Atom device but should be verified by the Dispatcher to ensure accuracy.
2. The **Union** field should be auto-populated based on system configuration. If this is blank, refer to internal policies for the appropriate selection, if any.
3. The **Craft Code** field refers to the employee’s craft code and is auto-populated based on system configuration but may be manipulated by end-users if the configuration allows.
4. The **Boom Length** field only applies with specific unit configurations and may be set by the employee. This field may not apply for some organizations.
5. **ST Hours** is the total number of hours the employee accounted for during the job.
6. **Shift** applies only when an organization requires and may be left as N/A if not applicable.
7. **Work Comp** and **Burden** should be auto populated by an administrator and should not be modified without approval.
8. **Class** is selected by the employee to determine the role of the employee during the job. Classes define whether an entry is productive or non-productive.
9. The **Job** field may be pre-populated by the employee if the employee was on a customer related job. If this field is filled, the **Work Order** and **Activity** field will be grayed-out.
10. **Work Order** is used when the employee has completed work associated with a Work Order. The **Job** field will be grayed-out if this field is filled.
11. **Unit Code** refers to the specific unit within the fleet that the employee was operating.
12. **Activity** is used to identify the specific Action List item the Work Order-ed employee was working on.
13. **Approved** indicates that an individual has approved this entry. If checked, the two boxes to the right of the field will be populated with a name and date-time stamp and will be grayed-out.
14. **Comments** are used to identify details about the labor entry and may or may not be filled by the employee. This field can be used to address information that needs to be relayed to a payroll representative and carries through to various employee labor related reports.

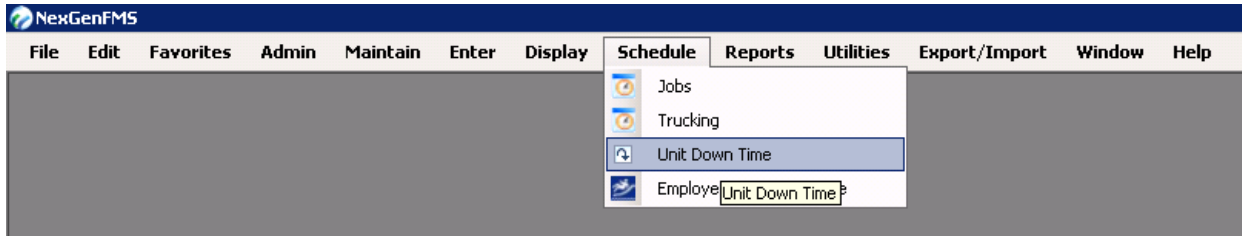
15. **ST Hours**, **OT Hours**, **DB Hours**, and **Total Hours** will be auto-populated based on rules applied by a system administrator. These fields will always be grayed-out.
16. Compare the details of this window to what is known about the job, job ticket or LEM, and any details that are known.
17. Check the **Approved** checkbox and click **Save** on the toolbar.

**NOTE:** Aligning windows on the dashboard allows for an efficient multi-tasking experience. The reviewer can open job information and have that information available while conducting the labor review.

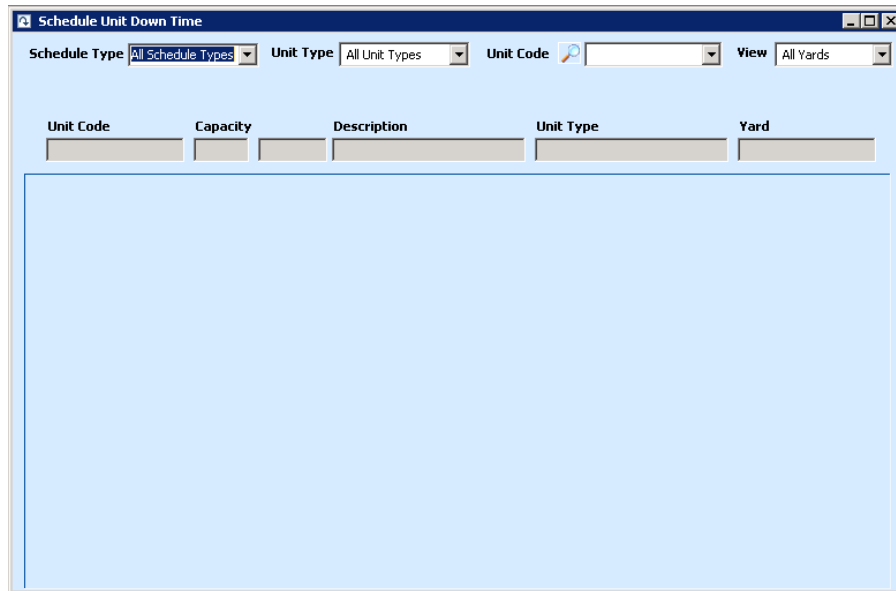
## HOW TO ADD UNIT DOWN-TIME

Unit down time is used to identify when a unit is not available for dispatching. This could be due to preventative maintenance scheduling, mechanical failure, inspections, or anything that should prevent the unit from being committed to a job.

Navigate to the Schedule Unit Down Time window through: Schedule -> Unit Down Time




The following window will appear:



## Scheduling Unit Down Time

Begin by selecting a unit from the **Unit Code** field. This field can be filtered by **Schedule Type**, **Unit Type**, and 'All Yards' or 'My Default Yard'.



1. Click on **Add** (  ) from the dashboard toolbar, right-click in any non-editable space within the window, or press CTRL + A.
2. Select the general **Reason** for the unit to be down.
3. Enter the **Down Date** and **Down Time**, and add any necessary **Comments**.
4. Enter the anticipated **Up Date** and **Up Time**.

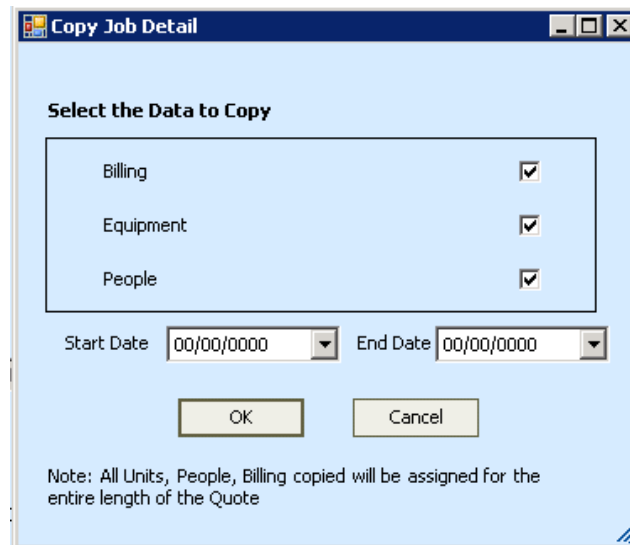
5. Click **Save** on the dashboard toolbar.
6. Repeat as necessary to document unit non-availability.

All entries in this window will appear as pink time blocks on the Display -> Unit Schedule, but will not appear on the Job Schedule or Employee Schedule.

## FREQUENTLY ASKED QUESTIONS (FAQ)

### FAQ: The Customer Wants The Same Unit Back at The Same Site; How Do I Copy a Quote From The Past?

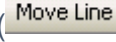
This is very simple. With the original job open, click on Copy Job () on the dashboard toolbar. A dialog box will appear asking to confirm the action. Click “Yes”. The Copy Job Detail window will appear next:



This window allows the user to customize the new job based on new information. Unchecking any of the boxes will prevent specific information from being copied and provide the user with a clean slate for that area. The Start Date and End Date are the applicable dates for the new job. Once all options have been review, click “OK” to continue.

A new Schedule Jobs window will replace the original and all information will be filled out. An easy way to spot the difference between the original and this new one is the missing Job No in the top left. If it is blank, then it hasn't been saved.

### FAQ: How Do I Sort Units in The Unit/People And Estimate Tab?

To sort the units, people, or estimate line items, click on the Move Line () button on the dashboard toolbar. This will change the top of the window to line of instruction:

**Double click the row you want to move - or click 'Move Line' again to cancel.**

While in “move line” mode, the Move Line button will remain highlighted for reference. ()


Follow the on-screen instructions: "Double click the row you want to move". This will bring up the next set of instructions:

**Double click the row to move this line in front of - Or press F8 to move to end.**

Complete this second set and watch the change occur.

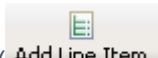
## FAQ: How Do I Insert a Unit Between Other Units in The Unit/People Tab?

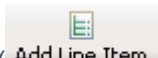


To insert units or people in the Unit/People tab, click on the Ins Unit/Ppl (  ) button on the dashboard toolbar. This function works very similarly to the insert function in other programs. It will insert a new blank row in front of (or above) the highlighted row.

## FAQ: How do I Manually Add a Line Item to a Job?

With a job open, navigate to the Line Item tab.



Click Add Line Item (  ), press CTRL + A, or right mouse-click in any non-editable space of the window. This will add a new, blank record for which to select options.

Line #	Line Item	Amnt Quoted	Est Expenses	Est Hours
	Exp/Rev/Both	Invoiced To Date	Act Expenses	
1	Daily Work	\$0.00	\$0.00	0
	Both			
2	On-Site Operation	\$0.00	\$0.00	0
	Both			
3	Mobilization In & Out	\$7,200.00	\$0.00	0
	Both			

Select from the available options in drop-down menu, any applicable Line Items, and specify whether the Line Item is an Expense, Revenue, or both. In most cases, 'Both' will be the preferred option. There are only a handful of scenarios where the 'Expense' or 'Revenue' options are used. The dollar values and Est Hours will populate based on selections in the Estimate/Est Bill tabs of the quote and job windows.

Navigate to the Est Bill tab and select from the available options in the drop-down menu under the Line Item column. Any quoted/estimated amounts present will be carried over to the Line Item.



## FAQ: What changes when an administrator enables Enhanced E-Ticket Cancellation?

The Enhanced E-Ticket Cancellation feature introduces additional e-ticket statuses, adds the pdf generation feature, delays the timing constraint for removing e-tickets, removes the option to 'delete' e-tickets, and adds a future-date e-ticket feature

1. Additional e-ticket statuses include:

New Status		Original Status	Affected Ticket Type
Not Sent		-	All
Sent		Not Started	All
Viewed		-	All
Downloaded		-	All
Started*		-	Operator, LEM
Left Yard	C	Left Yard	Operator, LEM, Trucking
Arrived Job	O	Arrived Job	Operator, LEM
1 <sup>st</sup> Signature	S	1 <sup>st</sup> Signature	Operator, LEM, Trucking
2 <sup>nd</sup> Signature	R	2 <sup>nd</sup> Signature	Operator, LEM, Trucking
Left Job	F	Left Job	Operator, LEM
Arrived Yard	Y	Arrive Yard	Operator, LEM, Trucking
Ended*		-	Operator, LEM
Completed	Z	Completed	All
Cancelled	X	Cancelled	All
Picked Up	C	Picked Up	Load
Started	O	Started	Trucking
1 <sup>st</sup> Signature	O	1 <sup>st</sup> Signature	Load
Received	F	Received	Trucking
Dropped	Y	Dropped	Load
2 <sup>nd</sup> Signature	F	2 <sup>nd</sup> Signature	Load

Where column 2 is gray, e-ticket statuses are not defined; instead, these are controlled through code. The letter designation is not exposed in the application but is viewable if querying the database. \*Started and

\*Ended only apply when an administrator enables the option in Set System Defaults ('Enable Start and Stop Times').

2. The pdf generation feature adds logic in Atom and NexGen to automatically generate a pdf copy of the e-ticket at the time a ticket is cancelled or completed. This is for recording keeping and preserving the layout of the e-ticket. A cancelled e-ticket will include the '-cancelled' segment in the file name and a 'cancelled' watermark on the pdf document. These pdfs are stored in the file links screen and accessible from the job in NexGen and Atom. A dispatcher may elect to include these tickets in the file links for field employees if it is deemed relevant/necessary.
3. The timing of e-ticket deletion and cancellation in previous versions of the system accounted for timing. If a ticket had been downloaded, it could no longer be deleted; if an e-ticket had a status of 'Arrived Job', the ticket could not be cancelled. The new approach removes the deletion option in favor of the pdf generation. The system will retain all instances of e-tickets, but no longer prevent dispatch from issuing new tickets on the same unit-row or employee-row. In addition, you may change the unit or employee if all instances of e-tickets have been cancelled for that row. If any ticket is in a different status, other than cancelled, you may not change the unit or employee references. This approach also introduced a later timing for when a ticket may be cancelled. Any ticket in a status preceding '1<sup>st</sup> Signature' may be cancelled.
4. The future-date e-ticket feature introduces a read-only version of the ticket when a field employee opens an e-ticket for a date later than today. This approach is intended to prevent the field employee from accidentally starting or completing a ticket intended for a future date.
5. In addition to the changes that directly affect the job, the same statuses have been added to the Display > Schedules. And, if an e-ticket is cancelled, the schedule will show that the ticket was cancelled.

## FAQ: What is and how does the Show Certifications feature work?

To support employer requirements under 29 CFR 1926.1427, FCC introduced the Show Certifications feature. This solution provides a quick and easy means for capturing certification requirements related to a job and what, if any, unit or employee certifications apply to the job.

In NexGen, when certification requirements are defined for a specific customer or job site, the system will compare all units and employees scheduled on the job against those standards and notify dispatch if any violations are present. In addition, the system will now retrieve a copy of the applicable certificate(s) and attach them to the 'Show Certifications' screen in the job. From within this screen, a user can view all relevant certifications and print or email the certifications as needed.

The feature also introduces functionality in Atom, in that, a field employee now has access to their own certifications (via 'My Certificates') and can email certificates on an ad hoc basis when asked to do so. Access to these certificates is controlled through NexGen and, if an employer feels this is unnecessary, it can be disabled.

### Concept

Begin by creating certifications through the Maintain > Employees > Certifications screen. This is where all non-unit specific certifications are created.

Select a certification type of 'Customer/Location'. This will enable the option to select this certificate in Maintain > Customers and Maintain > Customers > Customer Job Sites.

Navigate to Maintain > Customers > Customers, select a customer with a certification requirement, and go to the Certifications tab.

Click on the Add Cert button in the toolbar or press CTRL + A. This will add a new, blank row. Select Employee or Unit (depends on where the certificate was created) and then select the Certificate. The Description column will populate based on the Certification Name.

Once the customer's or job site's certifications are defined, NexGen and Atom will consider them when dispatch assigns units and employees.

If a job has specific requirements, and assuming the unit(s) and employee(s) possess the appropriate certificates, those certificates will be available in the Show Certifications window. From here, you may highlight one or more and click on E-mail or Print as needed. This feature is available in Atom as well.

VERSION CHANGE CONTROL

Date	Author	Version	Release	Change Notes
07/09/2020	David Thornton	3.1	Published	Added Show Certifications information to FAQ
07/06/2020	David Thornton	3.0	Published	Added e-ticket cancellation details throughout and a separate, detailed explanation in FAQ
03/28/18	David Thornton	2.2	Published	Removed watermark, revised footer and meta data
01/11/18	David Thornton	2.1	Published	Added “How to Add Unit Down Time”, “Working with Unit Type Defaults”, and “FAQ: How do I manually add a Line Item to a job?”
06/01/17	David Thornton	1.2	Draft	Pre-team mid-review; common edits from other reviews have been applied
05/25/17	David Thornton	1.1		Post Compilation and initial formatting
05/18/17	David Thornton, et al.	1.0		Original Compilation of modules