

Vahalo PM’s User Guide

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Vahalo System Overview

The Vahalo System is a powerful platform that organizes, automates and mobilizes any daily work process while integrating any resources needed to accomplish the work. This is a powerful system designed for expert users, so some understanding of the system is required to unlock its true power. There are three main pages in the system:

Dashboard Main Page

The screenshot shows the Vahalo Dashboard Main Page. At the top, there is a navigation bar with tabs for Dashboard, Projects, Resources, and Dispatch. A red box highlights the 'Choose Dashboard preference in User Profile' link in the top right corner. Below the navigation bar, the 'Project Manager' section displays a table of assignments. The table has columns for Assignment, Last Advanced, Progress, Plan Start, Plan End, Notes, Project, Location, and Project Notes. The table lists various assignments such as 'Material Order/Receipt', 'Material Aggregate Pit Sample', 'K05467 SoilDens BK 2/13', 'GB Insp ChkList sublot 1', 'MSE Wall Insp ChkList sublot 3', 'MSE Wall Insp ChkList sublot 1', 'MSE Wall Insp ChkList sublot 2', 'Emb Insp - D3 NB Zone 6 Lift 9', 'EMB S2 1SB GP11/25', and 'Soils Report'. A red box highlights the 'Choose Dashboard preference in User Profile' link in the top right corner.

The Dashboard provides a particular type of user with Tools and information customized specifically for that user type. Above is an example of a dashboard for a Technician or Inspector. Notice the “Todo” Listing provides any assignments that have been assigned to this user and have not been completed. Other user types will see a different set of custom listings, links, charts, etc.

Projects Main Page

The Projects page is where most of the actual work gets done.

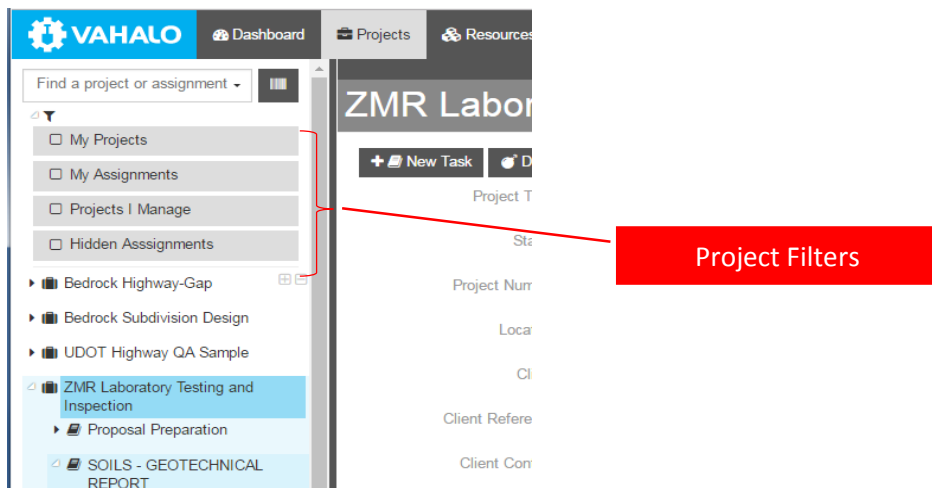
The screenshot shows the Vahalo Projects Main Page. The page is titled 'ZMR Laboratory Testing and Inspection'. On the left, there is a sidebar with a tree view of project categories. The main area displays a list of project details, including Project Type, Project Number, Location, Client, Client Reference, Client Contact, Revenue Center, Facility/Lab, Notes, Manager, Service Summary, and Proposal Summary. Red boxes highlight the 'Barcode Search', 'Main Search', 'Tree View Filters', and 'Main Tree View' features.

Main Tree view

The Left side of the page contains a tree view with arrow icons that allows you to navigate to Projects, Tasks and Assignments. Level one of the tree-view lists projects. Level two lists tasks. Levels three and deeper are assignments, sub-assignments, sub-sub-assignments, etc. At the top of the Tree-view is a powerful search box that will allow you to find any Item in the tree.

Just under the “Search Box” are several built-in filters that will limit the number of projects that show up in the tree.

- **My Projects** – shows only projects where this user is on the Project team.
- **My Assignments** – shows only projects where this user is assigned to Assignments
- **Projects I manage** – shows only projects where this user is designated as the project manager.
- **Hidden Assignments** – will show all hidden and unhidden assignments. Assignments may be hidden if they have associated sub assignments that may not be completed for an extended period of time. This will allow the Tree view to be “Uncluttered” while an assignment set is in a dormant period waiting for sub assignments to be completed. Concrete inspections are a typical example of this, the initial inspection is not complete until test cylinders have been cast, cured and broken which will typically take up to a month to complete.



New projects are added using the “New Proposal/Project” button at the bottom of the Tree view.

Find a project or assignment

- Bedrock Highway-Gap
- Bedrock Subdivision Design
- UDOT Highway QA Sample
- ZMR Laboratory Testing and Inspection
- System Functionality Demo
- MyAwesomeCo Administrative
- Star Fleet Platform Inspections
- Bedrock Highway Extension
- New Proposal/Project**

Project Setup

Project Template: Lab - Laboratory Testing

Project Type: Transportation - DOT

Name: My New Project

Client: Star Fleet Construction

Client Contact: James Kirk

Revenue Center: My Awesome Company (MAC) Inc.

Facility: My Awesome Company (MAC) Inc.

Proposal: Proposal-Scope & Estimate

Select tasks to include in the project.

All None

- Soils Inspection and Testing
 - SOILS - GEOTECHNICAL REPORT
 - SOILS - FIELD AND LAB TESTING
 - SOILS - COMPACTION TESTS ONLY
- Concrete/Masonry Inspection and Testing
- Asphalt Paving Inspection and Testing
- Structural Steel Inspection and Testing
- Other Site Inspection and Testing
- Building Inspections and testing
- Professional Services

No tasks will be created along with the project.

Create Project

Select typical tasks available in this Project Template, selected above

Project

Level one of the tree-view lists projects.

Find a project or assignment

- Bedrock Highway-Gap
- Bedrock Subdivision Design
- UDOT Highway QA Sample
- ZMR Laboratory Testing and Inspection**
 - Proposal Preparation
 - SOILS - GEOTECHNICAL REPORT
 - Soils Report
 - SOILS TESTING AND OBSERVATION
 - REINFORCED CONCRETE
 - Concrete Placement Basic No MD Inspection
 - Concrete Placement Basic 1 Sample
 - Concrete Adv W/MD Insp
 - Insp ChkList Concrete Vertical
 - Concrete Building Structural GMP 12/5
 - POST-TENSIONED CONCRETE
 - EPOXY DOWELS/ANCHORS
 - EXPANSION ANCHORS
 - GLASS FIBER REINFORCED CONCRETE
 - MASONRY

ZMR Laboratory Testing and Inspection

+ New Task Deactivate

Project Type: Inspection and Lab Testing

Project Number: KGS467

Location: Holiday area

Client: Star Fleet Construction

Client Reference: 45678

Client Contact: Sylvester Cat

Revenue Center: My Awesome Company (MAC) Inc.

Facility/Lab: My Awesome Company (MAC) Inc.

Notes: My notes for this project

Manager: Bugs Bunny

Service Summary: Certainly elsewhere my do allowance at. The address farther six hearted hundred towards husband. Are securing off occasion remember daughter replying. Held that feel his see own yet. Strangers ye to he sometimes propriety in. She right plate seven has. Bed who perceive judgment did marianne.

Proposal Summary: Certainly elsewhere my do allowance at. The address farther six hearted hundred towards husband. Are securing off occasion remember daughter replying. Held that feel his see own yet. Strangers ye to he sometimes propriety in. She right plate seven has. Bed who perceive judgment did marianne.

Reports

Budget Budget vs Spent

Projects - Tree level 1

Projects have six pages available:

- Details** – the main data form (see below)
- Gantt** – A scheduling tool to graphically show the Planned Start and End Dates for each task in the project. Summary information (Count, Min Start and Max Complete Dates) for each type of Assignment provide excellent indicators for the actual progress of the task.

- **Team** – list of people or other resources working on, or associated with, a project. This includes their roll on the project.
- **Distribution** – Tools for automated distribution of a defined set of reports and other documents to a predefined set of email recipients.
- **Invoices** – Listing of invoices that have been created for the project.
- **Reconcile** – provides project managers with tools to review time sheet entries against the initial budget

Primary buttons:

- **New Task** - allows for the creation of a new task from the project template.
- **Deactivate** – will remove the Project from the tree view. (available only to Project managers and Admins)

Task

Level 2 of the tree view are tasks, or general activity types. At the Task level we manage the scope and budget of the project.

SOILS TESTING AND OBSERVATION

Notes/Assumptions
Soil density tests are estimated at 1 density per 150' per lift for all utilities, sidewalk, curb & gutter, retaining wall and 1 density per 1,000 square feet per lift for the building and parking lot. Tech time is estimated at 2 hours per visit with a minimum of 4 passing densities per visit. Lab testing is estimated at 1 sample each for the UTBC, structural fill, trench material and existing. Each sample will have a gradation and all associated testing for soils classifications.

Scope
A technician with a nuclear gauge will perform density and moisture testing in the field during grading, utility trench backfilling, and pavement operations utilizing the American Society for Testing and Materials (ASTM) D2922, D3017, and D1556 methods. Laboratory maximum density and optimum moisture determination will be performed in accordance with ASTM D1557 or D698. CMT will provide:
 • Preparation of daily field reports;
 • Observation and verification during site clearing and mass grading;
 • Observation and testing during backfilling of utility trenches;
 • Observation and testing during backfilling around retaining walls;
 • Observation and testing during subgrade preparation and base/rock placement in asphalt and concrete paved areas;
 • Observation and testing during asphalt and concrete placement.
 Observation and testing will consist of visual observation of earthwork activities and taking field density and moisture tests for the purpose of ascertaining that the work is in substantial conformance with the contract documents. Such observation and testing shall not be relied upon by others as acceptance of the work nor shall it be construed to relieve the contractor in any way from his obligation and responsibilities under the construction contract. Specifically, but without limitations, observation and testing shall not require the technician and engineer to assume responsibilities for the means and methods of construction nor for safety on the job site.

Group
Soils Inspection and Testing

Budget
Status: Frozen
Occurrences: 1

Resource	Rate	Quantity	Total	Actions
Field Tech 3 - Field Densities ASTM/AASHTO	\$50.00/RtHr	120	\$6,000.00	
Proctors ASTM/AASHTO (Rock Corrected)	\$160.00/EA	2	\$320.00	
Sieve Analysis ASTM/AASHTO (-3/4")	\$65.00/EA	4	\$260.00	
Sieve Analysis ASTM/AASHTO (+3/4")	\$140.00/EA	12	\$1,680.00	
Field Tech 2 - Soil Sampling	\$42.00/RtHr	80	\$3,360.00	
Reporting Fee	\$15.00/EA	20	\$300.00	
Travel - Mileage	\$0.64/Mile	500	\$320.00	

Project tasks – Level 2 of the tree view

Tasks have two pages available:

- **Details** – the main data form (see below)
- **Reconcile** – provides project managers with tools to review time sheet entries against the initial budget

Primary Task buttons:

- **New assignment** - allows for the creation of a new assignment that is subordinate to this Task.
- **Deactivate** – will remove the task from the tree view. This can be useful for larger projects when only certain tasks are being worked on currently. (available only to Project managers and Admins)

Budget – is created automatically at project setup time based on the Pre-defined Project Template selected. The budget is edited by the project manager to produce the initial cost proposal for the project.

Assignments

The third level of the tree view and deeper are Assignments. Any work process, IE. Inspection, check list, test procedure, etc. is called an Assignment in Vahalo. Assignments are where the typical user will spend most of their time. Assignments can be thought of as any daily work process the needs to be accomplished. Assignments contain the custom forms to be filled out with any needed information for the work process. Assignments are organized in a familiar work breakdown structure of Projects and Tasks. Assignments are pre-configured to be linked together in a logical structure with a main assignment and subordinate assignments several levels deep.

The screenshot shows the Vahalo software interface. The left sidebar contains a project tree with the following structure:

- Bedrock Highway-Gap
- Bedrock Subdivision Design
- UDOT Highway QA Sample
- ZMR Laboratory Testing and Inspection
 - Proposal Preparation
 - SOILS - GEOTECHNICAL REPORT
 - SOILS TESTING AND OBSERVATION
 - REINFORCED CONCRETE
 - Concrete Placement Basic No MD Inspection
 - Concrete Placement Basic 1 Sample
 - Concrete Adv W/MD Insp
 - Insp ChkList Concrete Vertical (highlighted with a red box)
 - Concrete Building Structural GMP 12/5
 - POST-TENSIONED CONCRETE
 - EPOXY DOWELS/ANCHORS
 - EXPANSION ANCHORS
 - GLASS FIBER REINFORCED CONCRETE
 - MASONRY
 - NON-SHRINK GROUT
 - ASPHALTIC CONCRETE PAVING
 - STRUCTURAL STEEL

The main area displays the 'Insp ChkList Concrete Vertical' assignment page. The page includes a header with the assignment name and a toolbar with buttons for 'New Sub-Assignment', 'Duplicate', 'Duplicate values', 'Hide', 'Deactivate', and 'Delete'. The 'Details' section shows the following information:

- Notes: Check in with Joe when you get on site.
- Status: RFI outstanding
- Product / Segment: BRIDGE 3 Center St
- Assigned To: Porty Pig on 1/13/17 8:35 AM
- Planned Start: Fri Jan 13 2017 08:35:12 GMT-0700
- Planned End: Fri Jan 13 2017 12:35:12 GMT-0700

The 'Spent Resources' table shows the following data:

Date	Resource	Start	End	Budget	Unit	Quantity	Actions
Dec-07-2016	Greg Putnam	12:14 PM	12:54 PM	Concrete Inspector (Insp 5)	RtHr	0.7	[Icons]

The 'Progress' section shows the following information:

- Created: Greg Putnam on 11/28/16 2:14 PM
- Started: Greg Putnam on 11/28/16 2:14 PM
- Completed: Greg Putnam on 11/28/16 2:14 PM
- Approved: Greg Putnam on 11/28/16 2:14 PM

The 'Reports' section shows the following information:

- Assignment Summary
- Inspection Check List Concrete/Steel Reinforcement

The 'Actions' section shows the following information:

- Inspection Date: November 28, 2016
- Location Map Marker: 40.4751874, -111.9091034
- Item Inspected 1: Wing wall NE
- Location(s) 1: North East corner
- Elevation 1: 4569-4572

Assignments have three pages available:

- **Details** – the main data form (see below)
- **Time** – summary listings to make time sheet and resource billing more convenient by showing Spent Resources for this Assignment, My Time Sheet listing, and Budget Summary
- **Attachments** – provides for any type of file to be attached to this assignment.

Primary Assignment Buttons:

- **New Sub-assignment** – allows for the creation of a new assignment that is subordinate to this assignment. This button is only available if sub-assignments have been configured for this assignment.
- **Duplicate** – Creates a new BLANK copy of the this assignment/form
- **Duplicate Values** – Creates a new copy of this assignment/form with pre-marked form values copied to the new form. This should be the option of choice when doing the same assignment type over and over on the same project.
- **Hide** – hides this assignment for the tree view but keeps it available for dashboard listings. This is typically used when an assignment has sub-assignments that may take a significant amount of time to complete for example concrete inspections are not fully complete until all cylinders are broken after 28 or 56 days.
- **Deactivate** – an assignment is deactivated once the entire assignment set is completed, approved and all reports submitted. An assignment should only be deactivated once all sub assignments have been completed. Inactive assignments are always included in project and system level reporting but are not loaded to each device on the system to support offline functionality. Keeping completed assignments deactivated is important to reduce initial data-load and Re-Sync times.
- **Delete** – an assignment is marked for deletion if it has been accidentally created, contains no useful data and can be completely removed from the system.

Assignment details page is divided into 4 major areas:

- **Details** – fields available in every assignment:
 - Notes – Interoffice Communications, where a manager can provide instruction to a technician for example.
 - Status – Special status indicators for the Assignment. These status options are intended to supplement the basic “Progress” indicators (Created, Started, Completed, and Approved) and may often be unnecessary.
 - Product/Segment – this is a link to a Resource defined in the “Resource” page indication what is being created, improved or maintained by the work being accomplished in this assignment.
 - Assigned to: links to a person defined as a resource who is responsible for completing all or part of this assignment. In some instances another person may be assigned to complete another part of a form.
 - Planned Start and End – These dates will generally be filled in by a dispatch person or manager and may not be necessary in some situations.

- **Spent Resources** – Listing of timesheet entries for this assignment.
- **Progress** – these buttons provide for the efficient tracking of the basic assignment workflow and provide the basis for many of the dashboard lists related to workflow. Available in every assignment
- **Reports** – generate reports that apply to this assignment.
- **Actions/Inputs** – these are the customizable form inputs that are pre-configured for this specific assignment type.

Resources

Resources in the Vahalo System are anything used to accomplish the work, including people, companies, equipment, materials, documents and information. Resources and there properties are typically entered into the system once and used repeatedly by being referenced in various projects, tasks and assignments. Further, Resources are integral to project budgeting, timesheet entry and invoicing. Any resource can be tracked and billed and may have multiple billing units and rates. Vahalo also uses the concept of a “**Product**” resource. A product is the resource or client asset that is being created, improved or maintained by the assigned work. In a roadway project, for example, products are typically roadway segments, ramps, bridges, retaining walls, etc.

The screenshot shows the Vahalo Resource form for 'Troxler 04'. The interface includes a left-hand navigation tree, a top navigation bar, and a main form area. Red callout boxes highlight specific components:

- Main Classifiers**: Points to the 'Equipment' category in the left-hand navigation tree.
- Resource Types**: Points to the 'Concrete Test Kit (Air Slump, Wheel Barrow)' sub-category in the left-hand navigation tree.
- Actual Resource**: Points to the 'Troxler 04' resource entry in the left-hand navigation tree.
- Secondary Classifiers**: Points to the 'Model' field (4649 B) in the main form area.

The main form area displays the following information:

- Manager**: Fred Flintstone
- Owner/Employer**: My Awesome Company (MAC) Inc.
- Address**: My Awesome Co. Main Office
- Properties**:
 - Manufacturer**: Troxler
 - Model**: 4649 B
 - Year Made**: 2009
 - Serial/Vin #**: 234567
 - Tax/Barcode**: 2576
 - Capacity (Int)**:
 - Comments**: Ready for service
- Calibration**:
 - Last Calibration**: June 04, 2014
 - Next Calibration**: December 13, 2014

The resource tree view is similar to the main project tree view but the tree levels are solely used for classifying the resources. Level one is the main classifier, level two is the secondary classifier, level three is the resource type, level 4 is the actual resource, and level 5 shows the linked resources for the actual resource.

Resources have three pages available:

- **Details** – the main data form (see below)
- **Links** – provides a way to create relationships between resources for example, a technician may be linked to several certifications (Each Certification is it's own “Document” Type Resource).

- **Attachments** - provides for any type of file to be attached to this resource.

Details – these fields are available for every resource:

- **Internal Manager** – Internal Person in charge of this resource. For a person, this could be their manager, for a piece of equipment, this could be the person assigned to this item. For materials, it could be the person who maintains the inventory.
- **Owner/employer** – the company that is associated with this resource.
- **Address** – the location of this resource. An office, warehouse, lab, site etc.

Properties – these are the customizable form inputs that are pre-configured for this specific Resource type.

Accessing Vahalo from a desktop

Vahalo is available on any computer via Google Chrome Browser. All that is needed is the Site URL (?????.vahalo.com) and a user ID and Password. Check with your system administrator to get login credentials.

The first time the App is run on a machine, it will take some time to load. Subsequent App Starts will be much faster. You will also be asked to allow a large amount of data to be loaded onto the machine, this must be allowed or the system will not load.

Install Vahalo on an Android Tablet.

There are two options to run the system on an Android device, using an Android Package File (.apk) or run the system using Chrome for Android. To use Chrome, simply open Chrome and proceed as though you were on a desktop computer.

To use an Android Package File (.apk), your administrator will provide you with an Android Package File (SomeName.apk). Connect the tablet to a computer with the USB cable. Transfer the .apk file to the Device main storage to a folder you can find such as “Downloads”. Open the Devices File manager and find the .APK file and open it. Select install and follow prompts to open. Login and you’re ready to go.

Find an Existing Assignment

Assignments can be created by a manager or dispatcher and assigned to a technician, or a technician can create assignments and assign them to himself or others. An assignment can be started by one person and reassigned to another for completion or Approval.

You can find assignments assigned to you on the Dashboard page in the “**ToDo**” listing at the top. Any assignment assigned to you and is not yet been marked as complete will appear in the “ToDo” List. Once an assignment is marked “Complete” It will be removed from the “ToDo” List and will typically show up in the Project Manager’s “To Be Approved” Listing.

The screenshot shows the VAHALO Tech/Inspector interface. A red box highlights the 'To Do' table, which lists assignments with columns for Assignment, Last Advanced, Assigned, Plan Start, Plan End, Notes, Project, and Location. Below the table, there are links to reports and a status indicator showing 10 Samples In Transit. At the bottom, there is an 'Open Assignment' table showing details for three assignments.

Assignment	Last Advanced	Assigned	Plan Start	Plan End	Notes	Project	Location
EMB S2 1SB GP11/25	2/17/16 8:17	12/3/15 16:28			Check w/Joe on site	Bedrock Highway-Gap	Bedrock North
Soils Report	7/26/16 16:02	7/26/16 16:02				Bedrock Subdivision Design	Deer Park Township
GB Insp ChkList sublot 2	12/18/15 8:45	12/18/15 8:40				Bedrock Highway-Gap	Bedrock North
GB Insp ChkList sublot 1	12/18/15 8:45	12/18/15 8:40				Bedrock Highway-Gap	Bedrock North
MSE Wall Insp ChkList sublot 3	1/2/16 14:08	1/2/16 14:08				Bedrock Highway-Gap	Bedrock North
MSE Wall Insp ChkList sublot 1	1/2/16 14:08	1/2/16 14:08				Bedrock Highway-Gap	Bedrock North
MSE Wall Insp ChkList sublot 2	1/2/16 14:08	1/2/16 14:08				Bedrock Highway-Gap	Bedrock North
Material Order/Receipt	3/1/14 17:00	2/29/16 20:44				Star Fleet Platform Inspections	Bed Rock - Flintstone facility
Coating Rust Bubbles	2/29/16 21:31	2/29/16 21:31				Star Fleet Platform Inspections	Bed Rock - Flintstone facility

Assignment	Default Name	Notes	Created On	Created By	Assigned To	Progress	Last Action	Project
NON-SHRINK GROUT Report	NON-SHRINK GROUT Report		2016-12-08T15:03:54.043Z	Greg Putnam		Completed	2016-12-08T15:11:33.963Z	ZMR Labor
Fireproofing Test Item1	Fireproofing Test Item		2016-12-07T19:51:45.47Z	Greg Putnam		Completed	2016-12-08T14:41:44.06Z	ZMR Labor
Concrete Placement WMD L...	Concrete Placement WMD L...		2016-11-11T16:10:50.787Z	Greg Putnam		Completed	2016-11-11T17:41:49.27Z	Bedrock Hig

Alternatively you can go directly to the “Project” page and Type in a part of the name in the **Quick Search Box**, or navigate the **Tree View** to find the assignment (See Overview above for details).

Create New Assignment

There are two ways to create a new assignment:

1. Create an assignment in the Project page by navigating the tree view to the appropriate project and task and click “New Assignment” select the Pre-defined assignment you want and click “Next” to give your new assignment a name.
2. Navigate to an existing assignment and click “**New Sub-Assignment**”, “**Duplicate**”, or “**Duplicate With Values**”.
 - “**New Sub-Assignment**” works the same as “New Assignment” at the task level but only pre-configured sub-assignments for this assignment are available.
 - “**Duplicate**” will simply create a blank copy of this assignment.
 - “**Duplicate values**” will create a copy of this assignment but will copy forward values that were indicated as duplicate-able by the assignment template Design. This is a very powerful tool to save repeated inputs when doing an assignment repeatedly under similar circumstances.

Naming Conventions

Consistent naming of assignments is important because it can give critical initial indicators about the assignment contents and names are a primary means of quick searching. By default, the system will create a name that includes the Project Reference (which is recommended to be an abbreviated client and Project indicators or may be some numeric reference), an abbreviated Assignment type, your initials and a short date. This name can be edited if needed.

Work on an Assignment

Once an Assignment is selected from the Tree View, the “Details” page is displayed. Other Assignment pages are “Time”, and “Attachments”.

The Details Section

- Notes – Misc. notes to communicate between employees, do not show up on client reports.

- Status – Work Flow status indications when the basic “Start”, “Complete”, “Approve” are not sufficient.
- Assigned To - the person who should work on the Assignment next.
- Product - the resource or asset that is being created, improved or maintained by the assigned work
- Progress - See **Approval Work Flow** Below.
- Time – Enter Time sheet data linked to this assignment and against the correct budget item.
- Actions - Custom inputs/actions for this work process.

Attachments – Anything you want to attach can be attached to an Assignment or a Resource.


- Versioning – Any attachment can have a new version of the document added to the system and the older versions will remain in the system but only the current version will be active.
- Markups – Images can be marked up using a simple markup tool.

Approval Work Flow

Progress

On the Assignment - Details page the “Progress” buttons provide basic “Start” – “Complete” – “Approve” work flow for each assignment.

Progress

Created	Started	Completed	Approved	
Greg Putnam on 11/28/16 2:14 PM	Greg Putnam on 11/28/16 2:14 PM	Greg Putnam on 11/28/16 2:14 PM	Greg Putnam on 11/28/16 2:14 PM	

When an assignment is created and assigned to someone, but has not been completed, it will show up in the Assignee’s “ToDo” listing on the dashboard.

Once an assignment is “Completed”, It will automatically show up on the “Assignments to be Approved” listing on the Project Manager’s Dashboard.

A QA manager will Review each assignment and resulting final report. Once reviewed, the manager can approve the assignment, or re-assign back to the Tech if changes are needed. To Re-assign the Assignment back to the Tech, the manager can simply “Roll back” the “Completed” status indicator and the Assignment will once again appear on the Assignee’s “ToDo” dashboard Listing. Once approved, a final Report can be generated on Paper or PDF and forwarded to a client or other recipient or, the “Approved” button is also the trigger for inclusion in any automated “Distribution” Events (See Automated Report Distribution below).

Houskeeping

The final step is to do housekeeping with the intent of reducing the number of assignments cluttering the tree-view. Housekeeping requires some understanding of the assignment set in question. An Assignment Set refers to a root level assignment along with any associated sub-assignments and sub-sub-assignments. Once a root level assignment is complete and approved, it can be hidden to remove it from the Main tree-view but it will still remain in local data and show up in any Dashboard listings and searches. Using the “Hidden Assignment” filter will make all hidden assignments visible again if needed.

If an assignment set is fully complete, it should be “Deactivated”. “Deactivating” an assignment will remove it from local data and it will be stored only on the cloud server. An assignment should be deactivated once the entire assignment set is completed and approved. If an in-active assignment needs to be reactivated, a Project manager can do this using the “All Recent Assignments” Listing on the dashboard. This listing shows all recent assignments from the main server. Reactivating an assignment will require a “Re-Sync” to get the entire Assignment set reloaded to your machine. Other Users will not see the reactivated Assignment until they have Re-Synced also.

To recap, “Hiding” assignments Keeps the Main Tree-view from getting cluttered, and “Deactivating” An Assignment will keep un-necessary data from downloading to each device using the system. Both are critical housekeeping steps that need to be consistently performed to keep the system running smoothly and efficiently. In general it will be the responsibility of the Project Manager or Lab Manager or their assistants be sure these steps are taken.

Assignment

Insp ChkList Concrete Vertical

Details

+ New Sub-Assignment Duplicate Duplicate values Hide Deactivate Delete

Details

Time sheet entry

The efficient and accurate entry of Time Sheet information is critical to the success of any technical service business. Vahalo provides fully integrated time sheet entry tools to assist in this process. In order to maximize the usefulness of a time sheet entry, Vahalo requires that each time sheet entry includes not only the hours worked and the employee/resource, but also includes a link to a budget item and an Assignment. In Vahalo, Assignments are where the work happens, so the assignment is where time sheet entries happen.

Assignment

Soil Densities WO/Proc Inspection2

Details Time Attachments Sleuth

Duplicate Duplicate values Hide Deactivate Delete

Details

Notes

Status

Product / Segment

Assigned To Greg Putnam on 1/4/17 9:08 PM

Planned Start

Planned End

Spent Resources

Date	Resource	Start	End	Budget	Unit	Quantity	Actions
Mar-05-2017	Greg Putnam			Field Tech 3 - Field Densities ASTM/AASHTO	OTHr	0	
Mar-08-2017	Greg Putnam	8:38 AM	10:38 AM	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	2	

+ Add Time Clock Me In

The “Add Time” button is the normal way to enter time into the system. This brings up the time sheet entry Popup Box:

Time Sheet Entry Greg Putnam

Project: ZMR Laboratory Testing and Inspection Clear

Task: SOILS TESTING AND OBSERVATION Clear

Assignment: Soil Densities WO/Proc Inspection2 Clear

Budget Line: Field Tech 3 - Field Densities ASTM/AASHTO Clear Unbudgeted

Resource: Greg Putnam Clear Pick From Tree Me

Date: 2017-03-08 Clear Today

☒ Use Start and Complete

Start: 8:38 AM Clear Now

End: 10:38 AM Clear Now

Units: RthHr Clear

Quantity: 2 +0.1 +0.5 +1 +2 +4 -0.1 -0.5 -1 -2 -4 Clear Finish

Defaults to Current Assignment, but can be changed if needed

Defaults to most logical Budget Item, but may need to be changed. Use "Unbudgeted" if appropriate budget item doesn't exist

Defaults to Current User, but any Resource or Service Package can potentially be billed

Convenience button that inserts the Start and Complete times from the Progress Bar of the current Assignment

You have Options for selecting another resource if necessary.

Time Sheet Entry Greg Putnam

Project: ZMR Laboratory Testing and Inspection Clear

Task: SOILS TESTING AND OBSERVATION Clear

Assignment: Soil Densities WO/Proc Inspection2 Clear

Budget Line: Field Tech 3 - Field Densities ASTM/AASHTO Clear Unbudgeted

Resource: marl Clear Pick From Tree Me

Date: Clear Today

Start: Clear Now

End: 10:38 AM Clear Now

Units: RthHr Clear

Quantity: 2 +0.1 +0.5 +1 +2 +4 -0.1 -0.5 -1 -2 -4 Clear Finish

Mark Twain
 One Point Marshall - AC Test
 Mark Lift 42C
 F250 - Lamar
 Margaret Houlihan
 Mary Poppins

If you have an Idea who or what you're looking for, the Type ahead search works well

Time Sheet Entry Greg Putnam

Project: ZMR Laboratory Testing and Inspection Clear

Task: SOILS TESTING AND OBSERVATION Clear

Assignment: Soil Densities WO/Proc Inspection2 Clear

Budget Line: Field Tech 3 - Field Densities ASTM/AASHTO Clear Unbudgeted

Resource: Clear

- Hide types with no resources.
- Companies
- Docs & Info
- Equipment
- Material
- People
 - Client Representative
 - Employee-Admin
 - Admin Assistant
 - Book Keeper
 - Margaret Houlihan
 - Comptroller
 - Expediter
 - IT/Data Manager-Office
 - Office Manager
 - Employee-Craftsman

If you need to browse a list to select the resource use "Pick From List" and navigate the Tree view.

The "+" plus button allow you to add a resource that is not in the system yet. Be sure to enter the resource under the correct resource type

Time Sheet Entry Greg Putnam

Project: ZMR Laboratory Testing and Inspection Clear

Task: SOILS TESTING AND OBSERVATION Clear

Assignment: Soil Densities WO/Proc Inspection2 Clear

Budget Line: Field Tech 3 - Field Densities ASTM/AASHTO Clear Unbudgeted

Resource: Greg Putnam Clear Pick From free Me

Date: 2017-03-08 Clear Today

☒ Use Start and Complete

Start: 8:38 AM Clear Now

End: 10:38 AM Clear Now

Units: RthHr Clear

Quantity: 2 Clear

+0.1 +0.5 +1 +2 +4
-0.1 -0.5 -1 -2 -4

Finish





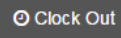



"Start" and "End" entries are optional for the system but may be required administratively. A default "Quantity" value is calculated from these entries. Odometer readings can also be entered here to get the mileage for the day

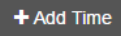
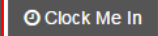
"Units" is a required field and will usually provide a default. ALWAYS check to be sure it is correct.

Quantity can always be entered directly through the system will always attempt to save key strokes by calculating a value if possible

The "Clock Me In" Button will start an entry and wait for a single click completion of the entry. Also notice that in the "Actions" column, some entries provide the "Trash", "Edit" and "Duplicate" Icons, while others only have the "Duplicate" Icon. This protects against editing an entry that has already been invoiced. Or editing items that do not belong to you.


Spent Resources

Date	Resource	Start	End	Budget	Unit	Quantity	Actions
Mar-05-2017	Greg Putnam			Field Tech 3 - Field Densities ASTM/AASHTO	OTHr	0	
Mar-08-2017	Greg Putnam	8:38 AM	10:38 AM	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	2	  
Mar-08-2017	Greg Putnam	12:25 PM		Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	0	  





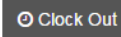






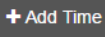
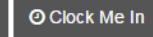
There is also a “Time” page for an assignment that provides more time entry tools. This page provides a duplicate of the time sheet information for this assignment, and also provides a weekly summary of this user’s time sheet. At the top is a “Print” button that will generated a full time sheet Report for this user.

Assignment
Soil Densities WO/Proc Inspection2
Details
Time
Attachments
Sleuth











Spent Resources

Date	Resource	Start	End	Budget	Unit	Quantity	Actions
Mar-05-2017	Greg Putnam			Field Tech 3 - Field Densities ASTM/AASHTO	OTHr	0	
Mar-08-2017	Greg Putnam	8:38 AM	10:38 AM	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	2	  
Mar-08-2017	Greg Putnam	12:25 PM		Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	0	  

My Time Sheet

February 27 to March 5, 2017

Date	Project/Task/Assignment	Budget	Unit	Qty.	Actions
Mar-02-2017	ZMR Laboratory Testing and Inspection / SOILS TESTING AND OBSERVATION / Soil Dens W Resc 10Tests/form	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	2.8	
Mar-02-2017	Daily Total			2.80	
Mar-03-2017	ZMR Laboratory Testing and Inspection / SOILS TESTING AND OBSERVATION / Soil Dens W Resc 10Tests/form	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	3.1	
Mar-03-2017	Bedrock Highway-Gap / Embankment-Gap / Material Sample For Lab Tests	Field Tech - Field Densities ASTM/AASHTO	RtHr	4.0	  
Mar-03-2017	ZMR Laboratory Testing and Inspection / SOILS TESTING AND OBSERVATION / Soil Dens W Resc 10Tests/form	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	0.0	
Mar-03-2017	Daily Total			7.10	
Mar-05-2017	ZMR Laboratory Testing and Inspection / SOILS TESTING AND OBSERVATION / Soil Densities No Rescs 10 Tests/form	Field Tech 3 - Field Densities ASTM/AASHTO	OTHr	0.0	
Mar-05-2017	ZMR Laboratory Testing and Inspection / SOILS TESTING AND OBSERVATION / Soil Dens W Resc 10Tests/form	Field Tech 3 - Field Densities ASTM/AASHTO	RtHr	0.0	
Mar-05-2017	Daily Total			0.00	
Total for Week					9.90

Daily Inspection Checklists

The first level Assignment is generally a Daily Inspection Checklist or Report. In Vahalo, these inspection forms are customized to the specific task or activity that is being performed. (i.e. Embankment, GB, MSE Select Fill, UTBC Placement, concrete placement etc.) These Custom Inspection Forms collect all of the typical data included in a DIR.

- Location Data
- Material being placed
- Spec Criteria
- Checklist of critical inspection issues.
- Test summary data
- General acceptance
- Signoffs – Tech and Manager.

Each Checklist item in a form uses three parts:

- Area of Concern heading – Summary of items the inspector should be looking for.
- Accept or Report toggle - Is the work acceptable or is there an issue that needs to be reported.
- Comment Speed Notes – Pre defined notes that can be selected to fill in the Comment field. Direct entry and edits are also allowed in these fields.

Other Subordinate Assignments to the Inspection Checklist would include Field tests conducted, Lab Samples taken, Issues to be resolved etc.

Field Density Tests

Placement of Soil materials require in-place density and moisture field tests. Field Density Tests will be available as subordinate assignments to any of the Soils placement related Inspection Checklist Assignments. These Inspection Check lists will provide the option of auto generating Field Density Test Sub-Assignments based on data entered. Field Density Test Sub-Assignments can always be created manually if needed or preferred. Input fields used to calculate and create the Field Density Test Sub Assignments Include:

- Station Begin
- Station End
- Offset Begin
- Offset Begin Left/Right
- Offset End
- Offset End Left/Right
- Default Proctor
- Default Nuke Gauge
- Default Probe Depth (in)
- Default Lift Thickness (inches)
- Material Installed
- Material Grade Criteria
- Test Frequency OR (Leave Blank if # SubLots is filled in)
- Number of Sublots (Leave Blank if Test Frequency is Filled in)

When the Button “Auto-Create Sublots” is clicked, Field Density Test Sub Assignments are created based on the number of sublots needed or requested.

Each Field Density Test Sub Assignment can now completed by the Inspector or assigned to a Technician with the greatest degree of flexibility possible.

Approvals can be performed on each Test and on the overall inspection check list.

A simple version of the soils density form is also available for smaller retail projects. This version doesn't use resource reference in some cases and uses an input grid for actual density tests rather than sub assignments.

Material Source: **Mordor Quarry - Granular Borrow 3" minus**

Material Grade Criteria: **GBB Granular Backfill Borrow**

Spec Requirement Summary: 4 random tests per 1000 SY lot, min(1/250SY), one per lift, Avg of 2 >=96

% Compaction (If not Spec):

Proctor: **Proctor - 110@13 SW Geneva Bridge**

Nuke Gauge: **Troxler 04**

Std Count-MS: 2354

Std Count-DS: 2334

Nuk Density Grid

Location/Elev	Probe Depth	Wet Dens PCF	Moist (%)	Dry Dens PCF	Proctor Max Dens PCF	Proctor Opt Moist (%)	Comp action (%)
Location 1	10	118.4	9.4	108.2	110	13	98.4%
Loc 2	10	117.4	6.8	109.9	110	13	99.9%
				0	110	13	0.0%
				0	110	13	0.0%
				0	110	13	0.0%
				0	110	13	0.0%
				0	110	13	0.0%
				0	110	13	0.0%
				0	110	13	0.0%
				0	110	13	0.0%

Soil Sample Process

Getting properly identified samples from the field to the Lab has always presented occasional challenges. With Vahalo we have the ability to use barcode technology and direct field entry of sample data to help us streamline the process. Pre-Printed Barcode tag sets are key to this process:

1034 
Proj. _____ Init. _____ Date _____

1034 
Proj. _____ Init. _____ Date _____

1034 
Proj. _____ Init. _____ Date _____

1034 
Proj. _____ Init. _____ Date _____

1034 
Proj. _____ Init. _____ Date _____

Each barcode tag set is pre-printed in the office with unique numbers and distributed to all inspectors and technicians. Each technician or inspector needs to be sure to have a stack of Barcode Tag Sets and a few Tag holders in their pickup or briefcase.

When a soil sample is taken in the field, an assignment "Material Sample for Lab Tests" is created and filled out in the field.

- As precaution, on the top Label, Fill out by hand the Project number, Your Initials and short date MM/DD. This should be need but it will provide additional information to help locate missing samples or records if necessary.
- A set of Sample ID (Barcode) labels are attached to the sample Container. Barcode labels come in sets of 5 or 10 and the individual Sticky labels are used in the lab to attach to the various tests that are done on the sample or to the individual Concrete cylinders that are going into the cure room. Field Techs should be sure to use a 10 label barcode set when more than 5 lab tests are anticipated on the sample or more than 5 cylinders have been cast.
- The Sample form "Progress" is Marked "Started". (Dashboard List Item moves from "My Assignments" to "Samples in transit to Lab")

Sample is transported to the Lab or assigned to a runner for pickup. Pick up Instructions Can be entered in the Assignment "Notes" Field.

Sample is received at the Lab and Lab Test forms are created for each requested test (Sub-Assignments to the Sample Form). Once a test form Assignment is created it will automatically show up in the Dashboard list "Lab Tests to be Completed".

- Lab test can be assigned to a specific Lab Tech by a manger or dispatcher or
- Tests can be adopted by a Lab Tech and assigned to himself as time is available

The Sample is divided for the various tests. A tag with Set ID Sticker is attached to each test process container and a container ID is added to the Test Name.

Once initial Sample division and processing Material Sample Record is marked "Complete".

Each individual test is performed and marked "Complete" which will automatically add it to the" Dashboard List "Lab Tests to be Approved".

Engineer or Manager approves each test, creates a Final report and distributes it. Hides the test

Concrete Cylinder Sample Process

As Concrete Cylinder sets are created in the field a "Sample Cylinder Set" is filled out and cylinder Break records are automatically generated. Progress is marked "Start" and "Sample Cylinder Set" record now appears on the "Samples in Transit to Lab" Listing on the Dashboard. Assignment "Notes" can be filled out indicating where to pick up the Samples if needed.

Sample cylinders are transported to the Lab or assigned to a runner for pickup. Pick up Instructions can be entered in the Assignment "Notes" Field.

Cylinders are processed, labeled and put into cure room.

"Sample Cylinder Set" Assignment is marked as "Complete"

Sample cylinder Record shows up in "Conc Samples in Cure Process" Listing on the Dashboard.

Cylinders show up on "Cylinders to be broken today" Dashboard List on the "Break Day"

Cylinder Break Tech fills in:

- Diameter (if needed)
- Max Load
- Fracture Type
- Broken By (auto updated to current User)

Once all breaks, for a “Sample Cylinder Set” have been broken, it shows up on the “Lab Tests to be Approved” Dash Board List.

Engineer or Manager Approves Final report and distributes it.

HMA Field Tests

Placement of HMA require in-place density tests using a field gauge, in addition, core samples are taken to verify thickness. The cores are sent to the lab for density verification. Field Densities and Matt Cores Tests are entered in the system as subordinate assignments to the HMA Inspection Checklist Assignments. These Inspection Check lists will provide the option of auto generating Field Density/Core Test Sub-Assignments based on data entered. Field Density Test Sub-Assignments can always be created manually if needed or preferred. Input fields used to calculate and create the Field Density Test Sub Assignments Include:

- Station Begin
- Station End
- Offset Begin
- Offset Begin Left/Right
- Offset End
- Offset End Left/Right
- Default Marshall/Rice Lab#
- Default Marshall/Rice Density
- Default Nuke Gauge
- Default Lift Thickness (inches)
- Installed HMA Mix design
- Material Acceptance Criteria
- Number of Sublots

When the Button “Auto-Create Sublots” is clicked, Field Density/Core Test Sub Assignments are created based on the number of sublots requested.

Each Field Density/Core Test Sub Assignment can now be completed by the Inspector or assigned to a Technician with the greatest degree of flexibility possible.

Approvals can be performed on each Test and on the overall inspection check list.

Project Management

Project Setup Process

At the bottom of the main project tree view is the “New Proposal/Project” button. This will open the New project setup page to the right. Set up Process is as follows:

- Project Template – As discussed previously, project templates are at the core of the system and this is where the template that forms the basis of the entire project is selected. Each Project Template will provide different task and assignment sets. Once a template is selected, the Tasks available for that template are available in the task Selection Tree below.
- Project Type – Select a classifier for the Project.
- Name – Enter the Name of the project.
- Client – Select the Client Company for this project from the list of clients already entered into the system previously, or enter a new client by clicking the “+” button for the type of company you’re entering. This will

prompt you for the Name of the Company. You will then be taken to the blank resource page to allow you to enter other information about the company if available. Always try to enter the best information possible into the system as early in the process as possible. Once the Client Company Data is entered, return to the project setup by clicking on the “Project” tab.

- Client Contact – (Optional) Select the Person from the Client Organization that will be the Primary contact for this project.
- Revenue Center – Select our Office/Location that is handling this project.
- Facility – (Optional) Select the Lab or other internal facility that may
- Proposal – Select the type of proposal that you would like to create as a part of this New Project Setup. When the project is created, a “Proposal” Task will be added with an assignment of the type indicated here. If this is left blank, No “Proposal” task nor assignment will be added to the project. Note – the Proposal task and assignment can be added manually later if needed.

VAHALO Dashboard Projects Resources Resynchronize Online gmp

Find a project or assignment

Project Setup

Project Template: Lab - Laboratory Testing

Project Type: Transportation - DOT

Name: My New Project

Client: Star Fleet Construction

Client Contact: James Kirk

Revenue Center: My Awesome Company (MAC) Inc.

Facility: My Awesome Company (MAC) Inc.

Proposal: Proposal-Scope & Estimate

Select tasks to include in the project.

Soils Inspection and Testing

- SOILS - GEOTECHNICAL REPORT
- SOILS - FIELD AND LAB TESTING
- SOILS - COMPACTION TESTS ONLY

Concrete/Masonry Inspection and Testing

Asphalt Paving Inspection and Testing

Structural Steel Inspection and Testing

Other Site Inspection and Testing

Building Inspections and testing

Professional Services

No tasks will be created along with the project.

Create Project

Choose either a Project Template or an Existing Project to use as a model for the new project

Project Details

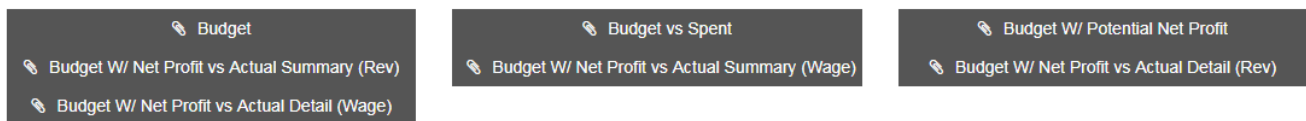
When a Project is selected from the tree view, the project detail page appears. Many of the most important fields on this page can be filled in on the Project setup page. The Fields are:

- Planned Start and End – Just the anticipated start and end dates for the Project.
- Project Type – See above
- Status –
 - Potential Project – Tracking – This status would be used only if the system is being used to track potential projects
 - Proposal/Quote In-Preparation – Normally the event that will cause a project to be entered into the system is the submittal of a proposal.
 - Proposal/Quote Accepted - Waiting Work Start
 - Proposal/Quote Rejected - Closed

- Active Work - In Progress
- Work Stopped Temporarily By Us
- Work Stopped Temporarily By Client
- Work complete - Waiting on Client
- Work Complete - Waiting on Accounting
- Work Complete - Closed
- Project Reference – Traditionally project are assigned a project Number as an Identifier for the project. In this system, each project is automatically assigned a unique identifier and the project can be identified using other means so it is suggested that the project reference be used as a project abbreviation to include a 3-5 character abbreviation of the client and a short indicator of the Project.
- Location – detailed description of the actual project location.
- Client - See above
- Client Reference – the client's project number for the project.
- Client Contact – See above
- Revenue Center – See above
- Facility/Lab – See above
- Notes – General notes of descriptive information about the project.
- Manager – Person within our organization that will be managing this project.
- Service Summary – A summary of the services or scope of work that organization did on this project. This entry is intended to be used as part of marketing materials.
- Proposal Summary – A full description of this project for use in marketing materials.

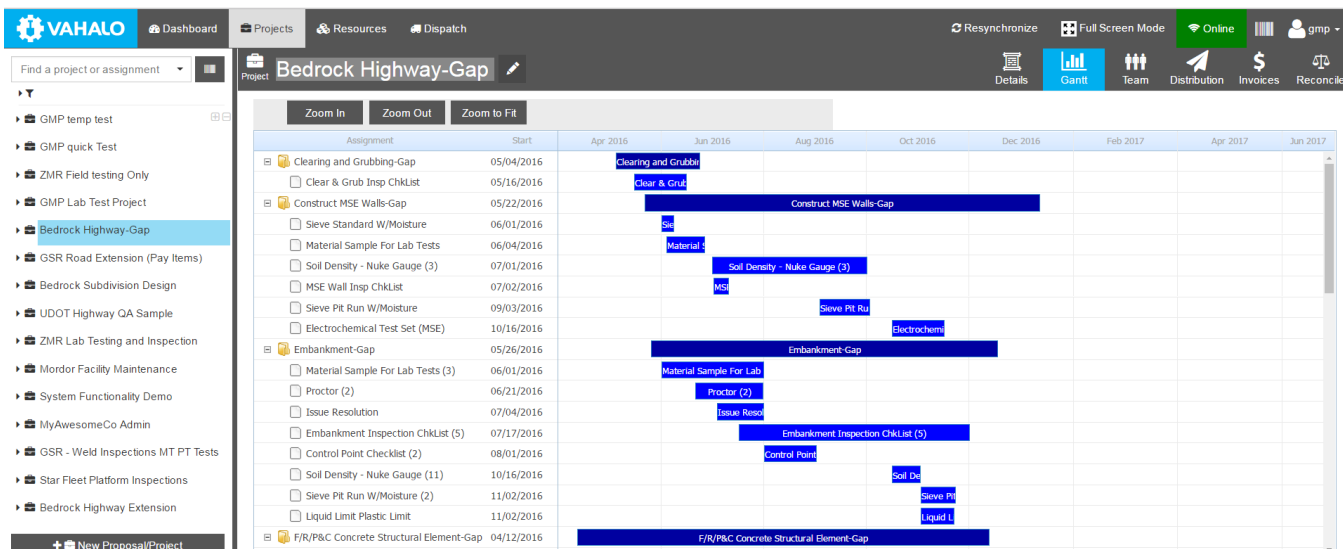
Reports – See appendix for examples of each of the project level reports.

Reports



Gantt Chart

This page provides a traditional project management tool that allows for estimating the general timeframe of each of the tasks associated with the project. And as the project progresses, the earliest and latest actual start and complete dates are shown as sub elements of the task to provide as an indication of the work that has been completed.



Project Team

The Project Team page provides a way to link resources such as people, drawings, or major pieces of equipment with a project. By adding a client to the project team and providing him a login as a “Client” user. He can access the system and has view only privileges for projects where he is on the team. Both Resource and Role, inputs are “Type Ahead” search, so simply start typing and a Popup list will appear.

The screenshot shows the Vahalo software interface. The top navigation bar includes 'VAHALO', 'Dashboard', 'Projects', 'Resources', and 'Dispatch'. The 'Projects' tab is active, showing the 'Bedrock Highway Extension' project. The 'Team' sub-tab is selected, displaying a 'Project Team' table. The table has two columns: 'Resource' and 'Role'. The resources listed are Greg Putnam (QA Engineer), Obi-Wan Kenobi (QA Inspector), Elmer Fudd (QA Lab Manager), Luke Skywalker (QA Project Manager), Doctor Spock (City Engineer), and Ron Reagan (QA Project Manager). Below the table is a button labeled 'Add A Project Team Member'. The left sidebar shows a list of projects, with 'Bedrock Highway Extension' highlighted. The top right corner shows user information: 'Online', 'gmp', and a dropdown menu.

Resource	Role
1 Greg Putnam	QA Engineer
2 Obi-Wan Kenobi	QA Inspector
3 Elmer Fudd	QA Lab Manager
4 Luke Skywalker	QA Project Manager
5 Doctor Spock	City Engineer
6 Ron Reagan	QA Project Manager

Add A Project Team Member

Report Distribution

The key value offering of most technical service organizations is largely information based. Often a large number of reports and informational documents are generated as a part of the organization’s daily operations. These documents often need to be distributed to a variety of interested parties. Vahalo uses email to automate the process of distributing reports to various interested parties by providing “Distribution Groups”. A “Distribution Group” defines a specific group of reports to be distributed to a specific group of recipients. When creating a Distribution Group, select a Classifier to define the reports available to distribute. Use a name that will distinguish this group from other groups in this project. Other relevant fields:

- Attachments – determines if files attached to these Assignments/Reports will be include with reports when emailed to the various recipients. For example, inspection reports may often have Photos associated with them.
 - Note: Attachment will be include in the email sent to recipients when the Create Date of the Attachment is greater than the Last Send Date for the Distribution Group.
- Last Sent – is the date this Distribution Group was last sent, manually or automatically.
- Frequency – Recurring send times
- Recipients – Enter recipients using Type ahead search
- Cover Letter – Enter a brief Subject and Body for the Email to be sent
- Attach Reports – In the tree view, navigate to the reports needed by these recipients and Click the “+” to Attach the report each email sent.

Note: Sending reports is an integrated part of the regular assignment workflow. Sending a report is triggered when the date and time an assignment is “Approved” as part of the normal workflow process is greater than the Last Sent time. A Proposal or Contract is also an assignment so a proposal will not be sent until it has been “Approved”. Project level budget type reports are a point-in-time snapshot type of report, so these reports will be sent every time the group executes. Invoices will be sent only when the create time is greater than the “Last Sent” time.

VAHALO

Dashboard

Projects

Resources

Dispatch

Resynchronize

Full Screen Mode

Online

gmp

Find a project or assignment

Y

GMP temp test

GMP quick Test

ZMR Field testing Only

GMP Lab Test Project

Bedrock Highway-Gap

GSR Road Extension (Pay Items)

Bedrock Subdivision Design

UDOT Highway QA Sample

ZMR Lab Testing and Inspection

Mordor Facility Maintenance

System Functionality Demo

MyAwesomeCo Admin

GSR - Weld Inspections MT PT Tests

Star Fleet Platform Inspections

Bedrock Highway Extension

New Proposal/Project

Project

Bedrock Highway-Gap

Details

Gantt

Team

Distribution

Invoices

Reconcile

Group Name	Project	Owner	Classifier	Attachments?	Last Sent	Frequency	Actions
Distribution Group	Bedrock Highway-Gap		Reports	X No		Manual Send Only	
Construct MSE Walls-Gap	Bedrock Highway-Gap	Tweety Bird	Reports	✓ Yes		Monthly (Last day 10:00 PM)	
Testing report adding w/ caching	Bedrock Highway-Gap	Tweety Bird	Reports	X No		Manual Send Only	

Create Distribution Group

Distribution Group [Construct MSE Walls-Gap]

Recipients

Recipient List

1 Greg Putnam

2 Luke Skywalker

Add a Recipient to the Distribution Group

Cover Letter

Subject

Demo of distribution emails

Message

Once upon a midnight dreary, while I pondered, weak and weary,
Over many a quaint and curious volume of forgotten lore—

Attach Reports

Bedrock Highway-Gap

Assignment

Document Name

Actions

VAHALO

Dashboard

Projects

Resources

Dispatch

Resynchronize

Full Screen Mode

Online

gmp

Find a project or assignment

Y

GMP temp test

GMP quick Test

ZMR Field testing Only

GMP Lab Test Project

Bedrock Highway-Gap

GSR Road Extension (Pay Items)

Bedrock Subdivision Design

UDOT Highway QA Sample

ZMR Lab Testing and Inspection

Mordor Facility Maintenance

System Functionality Demo

MyAwesomeCo Admin

GSR - Weld Inspections MT PT Tests

Star Fleet Platform Inspections

Bedrock Highway Extension

New Proposal/Project

Attach Reports

Bedrock Highway-Gap

Project Management

Cleaning and Grubbing-Gap

Embankment-Gap

Place and finish Granular Borrow-Gap

Place and Finish UTBC-Gap

Install Drainage-Gap

F/R/P&C Concrete Structural Element-Gap

Construct MSE Walls-Gap

Electrochemical Test Set (MSE)

Issue Resolution

Issue Resolution Lab

MSE Wall Insp ChkList

Inspection Check list - MSE Wall

Nuclear Density Report (< 8 Sublots)

Moisture Analysis

Proctor

Sieve Pit Run W/Moisture

Sieve Standard W/Moisture

Place Hot Mix Asphalt (HMA)-Gap

Place and Cure PCCP - Gap

Landscape Seeding-Gap

Assignment

Document Name

Actions

MSE Wall Insp ChkList

Inspection Check list - MSE Wall

MSE Wall Insp ChkList

Nuclear Density Report (< 8 Sublots)

Proctor

Proctor Report

Sieve Pit Run W/Moisture

Sieve Pit Run Report

Sieve Standard W/Moisture

Sieve Standard Report

Moisture Analysis

Moisture Content Report

Track Project Financial Status

Create/Edit Budget

At the core of every Vahalo Project is a project template. These project templates are created by a configuration specialist to make setting up a similar type of project over and over more efficient. A typical default budget is always included in a project template. During the project setup process, default budgets are automatically created for each Task selected. Each budget line is linked to a specific resource type (Standard Resource). For various employees resource types are set up to correspond to labor grades or rough Pay levels. Default data is included for each field except quantity. Any of the default data may be edited or the un-needed lines can be deleted. New Budget lines can always be added.

Dashboard
Projects
Resources
Dispatch
Resynchronize
Full Screen Mode
Online
gmp

- GMP temp test
- GMP quick Test
- ZMR Field testing Only
 - Proposal Preparation
 - SOILS - FIELD AND LAB TESTING
 - REINFORCED CONCRETE
 - POST-TENSIONED CONCRETE
 - EPOXY DOWELS/ANCHORS
 - MASONRY
 - ASPHALTIC CONCRETE PAVING
 - STRUCTURAL STEEL
 - FLATNESS TESTING
- GMP Lab Test Project
- Bedrock Highway-Gap
- GSR Road Extension (Pay Items)
- Bedrock Subdivision Design
- UDOT Highway QA Sample
- ZMR Lab Testing and Inspection
- Mordor Facility Maintenance
- System Functionality Demo
- MyAwesomeCo Admin
- GSR - Weld Inspections MT PT Tests
- Star Fleet Platform Inspections

Budget

Delete this Budget

Status Unfrozen

Occurrences 1

Resource	Rate	Quantity	Total	Actions
Inspector (4-2)	\$58.50/RtHr	127	\$7,429.50	Delete
Cylinder - Create, Cure & Break	\$15.00/EA	19	\$285.00	Delete
Technician - Air & Slump Testing (Fld Tech 2)	\$44.00/RtHr	85	\$3,740.00	Delete
Reporting Fee	\$10.00/EA	4	\$40.00	Delete
Travel - Mileage	\$0.64/Mile	80	\$51.20	Delete
Tech & Equip - Floor Flatness Testing (Fld Tech 3)	\$100.00/RtHr	86	\$8,600.00	Delete
Cylinders - Each	\$15.00/EA	32	\$480.00	Delete
Cylinder Pickup - (Runner)	\$35.00/RtHr	68	\$2,380.00	Delete
			Totals	\$23,005.70

Freeze

Freeze the Budget

Once a budget has been created and included as a part of the proposal and accepted by the Client, the project budget should not be changed unless the client is involved and approves the change. In order to avoid unwanted changes to the budget, a Freeze function is include. Once the Freeze button is pushed, any change must follow a change tracking process that records the details of all changes.

- Mordor Facility Maintenance
- System Functionality Demo
- MyAwesomeCo Admin
- GSR - Weld Inspections MT PT Tests
- Star Fleet Platform Inspections
- Bedrock Highway Extension
 - Embankment, Borrow And Backfill
 - Concrete Bridge Structures
 - Retail Concrete Placement
 - Hot Mix Asphalt (HMA)
 - Pipe - Underground Utility

New Proposal/Project

Budget

Status Frozen

Occurrences 1

Resource	Rate	Quantity	Total	Actions
Principal II	\$150.00/RtHr	5	\$750.00	
Granular Barrow	\$1.10/CY	200	\$220.00	
Inspector / Field Tech I	\$50.00/RtHr	46	\$2,300.00	
Atterberg limits ASTM /AASHTO	\$90.00/EA.	14	\$1,260.00	
Soil Density Gauge - Nuke	\$20.00/Day	12	\$240.00	
Proctors ASTM/AASHTO (Rock Corrected)	\$160.00/EA.	5	\$800.00	
Sieve Analysis ASTM/AASHTO (-3/4")	\$65.00/EA.	25	\$1,625.00	
			Totals	\$7,195.00

Open Change

Invoice Item Reconciliation

As users enter time sheet data into the system, each entry is linked to a budget item. The Time sheet “Reconciliation” page provides an efficient way to review and final approve time sheet entries before an invoice is created. This page uses the concept of concessions to provide the project manager with feedback about project profitability as the project progresses. A concession is indicated (Green = Positive, Red = Negative) when time sheet doesn’t match expectations. There are two types of Concessions:

1. Rate concession – When a higher-cost employee does work budgeted for lower cost employees.
2. Quantity concession – When the actual hours worked is different that the hours invoiced.

By default the Invoice quantity will equal the Actual quantity, but the invoice quantity can be edited by the project manager.

Inspector / Field Tech I

Rate	Budgeted Qty	Total Invoice Qty	Budgeted \$	Invoiced TD \$	Pending \$	Held \$	Total \$	% Spent	Concession \$
☐ \$50.00 / R/Hr	46	32.8	\$2,300.00	\$350.00	\$1,530.00	\$110.00	\$1,990.00	86.5%	(\$2,749.20)

[Hide Details](#)

Quantity Type	Invoiced	Pending	Held	Total
Actual Quantities ⓘ	7	37.6	2.2	46.8
Invoice Quantities ⓘ	7	30.6	2.2	32.8

Material Sample For Lab Tests

Date	Resource	Default Rate	Actual Qty	Invoice Qty	Invoice \$	Concession \$	Actions
12/14/16	Greg Putnam (Principal II)	\$150.00	9.3	9.3	\$465.00	(\$930.00)	⌵ ⌵
3/9/17	Greg Putnam (Principal II)	\$150.00	0.5	0.5	\$25.00	(\$50.00)	⌵ ⌵
3/10/17	Greg Putnam (Principal II)	\$150.00	8	4	\$200.00	(\$1,000.00)	⌵ ⌵
3/12/17	Greg Putnam (Principal II)	\$150.00	8	3	\$150.00	(\$1,050.00)	⌵ ⌵
5/1/17	Tweety Bird (Lab Tech 1)	\$35.00	4.6	4.6	\$230.00	\$69.00	⌵ ⌵

Emb Inspect - D3 NB Zone 6 Lift 8

Date	Resource	Default Rate	Actual Qty	Invoice Qty	Invoice \$	Concession \$	Actions
3/4/17	Daffy Duck (Lab Tech 2)	\$42.00	2	4	\$200.00	\$116.00	⌵ ⌵
3/9/17	Chew Bacca (Inspector 2)	\$54.00	5.7	5.7	\$285.00	(\$22.80)	⌵ ⌵

Proctor

Date	Resource	Default Rate	Actual Qty	Invoice Qty	Invoice \$	Concession \$	Actions
3/8/17	Daffy Duck (Lab Tech 2)	\$42.00	1.7	1.7	\$85.00	\$13.60	⌵ ⌵

Use the “Swap” Action to move the Item to a different budget line. (See Below)

Use the “Hold” Action to exclude the Item from the next Invoice.

What?

What work are you doing?

It's still Material Sample For Lab Tests

NCR - Low Compaction GMP

Material Sample For Lab Tests

Emb Inspect - D3 NB Zone 6 Lift 8

Hold Point Checklist - Embankment

Embankment Inspection SpeedNotes

Embankment Inspection SpeedNotes subplot 1

Embankment Inspection SpeedNotes subplot 2

Liquid Limit Plastic Limit

Soil Density & Moisture - Nuk Guage 1

Job Safety Analysis 3

LL PL w/Photos

Proctor

Embankment Sieve Moisture T27 T30

Soil Density & Moisture - Nuk Guage 2

Emb Inspect - D3 NB Zone 6 Lift 9

Deviation - Out of spec Gradation

CO - UnPlanned Access ramp

Embankment Inspection

Soil Density & Moisture - Nuke Gauge

Nuk Densities Basic WO/Proc

Nuk Densities Basic WO/Proc 2

RD-Wetland Encroachment

RFI-Source of material is Unknown.

RD - Over Moist Pumping

Search for a assignment

Pick from the tree

GMP temp test

GMP quick Test

ZMR Field testing Only

GMP Lab Test Project

Inspector / F

Rate

\$50.00 / R

Hide Deta

Quant

Actual

Invoice

Material

Date

12/14

3/9/17

3/10/1

3/12/1

5/1/17

Emb In

Date

3/4/17

3/9/17

Proctor

Date

3/8/17

Principal II

Concession \$

(\$2,749.20)

Total

46.8

39.8

on \$

Actions

00)

=

00)

=

00)

=

00)

=

00)

=

3.00

=

on \$

Actions

00

=

80)

=

on \$

Actions

60

=

Create Invoice

Once the time sheet entries for each task of a project have been review in the Reconciliation page for a particular period say for the month, an invoice can be created for that period. Open the Invoice Page (See Below). A listing of previous invoices for this project are displayed and available for review. An invoice is simply a collection of all previously un-invoiced time sheet items for this project that are not on hold. The system automatically assigns a sequential number as the Invoice Number. Clicking the Invoice number will show the invoice details, and allow the invoice to be printed.

For larger ongoing projects, you may want to consider setting up a Distribution Group to automate the sending of invoices to the client. Invoices are one of the three types of Distribution groups along with “Reports” and “Proposals”. By selecting a frequency of daily or weekly would insure the invoice is sent out timely.

Dispatch Assignments

Often an organization can be more efficient by having a single person coordinating and scheduling work assignments for a group of employees. The “Dispatch” Page is designed to make this process simple and efficient. The tree view at the left side of the screen shows all active projects and expanding into the tasks shows all available assignment types available. Once the proper Assignment is located, simply drag-and-drop the assignment on the available employee at the available time. By default, the assignment will last 2 hours but the duration can be adjusted by dragging either end of the bar. The bar can also be moved within the same row or to another row/employee. Double click the bar to add comments to the Assignment.

Workers who receive assignments dispatched using this method are notified in two ways. The new assignment will immediately be added to the assignee’s “ToDo’ list on their individual dashboard, and the system will also send a Notification Email to the new assignee. (NOTE: This feature requires full time connectivity to be most efficient. If an employee is working offline during the day, they will need to receive the day’s assignments by syncing in the morning while a connection is available. In this scenario, updates made to the schedule while the worker is offline would not be received until after reconnecting and syncing.)

The screenshot shows the Vahalo Dispatch interface. On the left is a sidebar with a tree view of projects and tasks. The top navigation bar includes tabs for Dashboard, Projects, Resources, and Dispatch. The main area displays a Gantt chart for Tuesday, May 30th 2017, with a time grid from 6 AM to 9 PM. Employees are listed on the left, and tasks are represented by colored bars. A red arrow points from a task bar to a red text box that says "Click here to move directly to the Assignment page".

User Access control

Controlling what specific users can see and do in the various parts of the system is critical to the overall success of any system. Vahalo has a very robust Access control system that manages these issues. The system is based on “Roles and “Privileges”. “Privileges” are defined to allow access to a very specific part of the system. “Roles” provide a user with a specific set of privileges. (See example below)

	Client	Tech	PM	Admin	Exec	Acct
Initial Project Load Filter				X		
All Projects			X	X	X	X
Only Projects from User's Profit Center (See Resource Detail "Owner/Employer")			X	X	X	
Only Projects Where User is on the Project team (Load Only Linked resources)	X		X	X	X	

Project Page

Create New Project			X	X	X	
Create New Task		X	X	X	X	
Deactivate Project				X		
View Project Details			X	X	X	X
Edit Project Name & Details			X	X		
View/Print Project level Reports	X	X	X	X	X	X
View Project Team			X	X	X	
Edit Project Team			X	X		
View/Send Existing Distributions			X	X		X
Create/Edit Distributions				X		
View/Edit Invoices				X	X	X
View/Edit Reconcile			X	X	X	

Task Page

Create New Assignment		X	X	X		
Deactivate Task (assuming report completed)				X		
Delete Task/Report			X	X		
View Detail Area			X	X	X	
Edit Detail Area and Name			X	X		
View Budget Area			X	X	X	
Edit Budget Area			X	X	X	
View Client Quantity Tracking Area	X		X	X	X	
Edit Client Quantity Tracking Area			X	X	X	
View/Edit Reconcile			X	X	X	

Assignment Page

Create new assignment (Any Method)		X	X	X	X	
Hide Assignment from tree view but not from dashboard			X	X	X	
Deactivate Assignment				X		
Delete Assignment Created by this User			X	X	x	
View Assignment Page All Sections			X	X	X	
Edit Detail area of assignment page (Notes, Assign To, Status, Product, Planned Start, End) if Created by or Assigned to this User		X	X	X		
Edit Detail area of assignment page (Notes, Assign To, Status, Product, Planned Start, End) Any Assignment			X	X		
Limited Editing (Notes, Status, Assigned to) If assigned to this user				X		
View Spent resources area			X	X	X	
Edit Spent Resources area				X		
View Progress			X	X	X	
Edit Progress (Start, Complete) if Created by or Assigned to this User			X	X		

Edit Progress (All) and Roll Back, Any Assignment			X	X	X	
View/Print Reports	X	X	X	X	X	
View Actions		X	X	X		
Edit Actions/Inputs (If User is Creator or Assignee)		X	X	X		
Edit Actions/Inputs (Any Assignment)		X	X	X		
View/Edit Time Page		X	X	X	X	X
View Attachments, Take Picture, Load a File		X	X	X	X	
Add/Edit Attachments		X	X	X	X	
Resources						
View All resources			X	X	X	
View Limited Resources - Only associated with User's Projects				X		
Deactivate a Resource				X		
Add New Resource			X	X		
Edit Resources				X		
View/Edit Links				X		
View Attachments, Take Picture, Load a File			X	X	X	
Add/Edit Attachments			x	X	X	
Add Edit Users				X	X	
Dashboard Availability						
Dashboard (Demo)				X	X	
Executive				X	X	
Field Manager			X	X	X	
Lab			X	X	X	
Project Manager			X	X	X	
Tech/Inspector	X		X	X	X	
UDOT			X	X	x	
Dispatch						
View Dispatch Page			X	X	X	

