

## Subcontractor Portal – How to Use

### Introduction

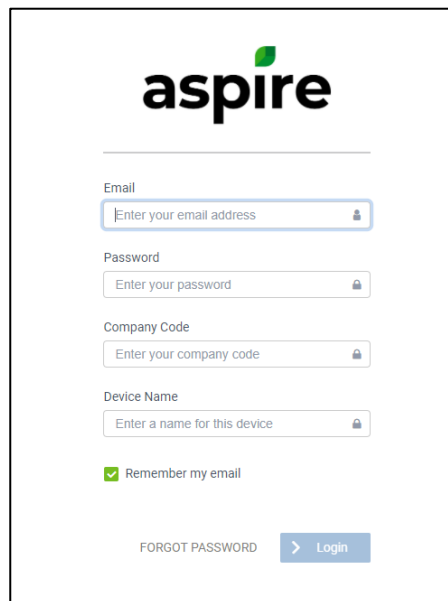
Aspire provides a subcontractor portal that allows subcontractors to manage and report work they perform on behalf of the company. Specifically, subcontractors can perform the following functions:

1. View scheduled visits for services placed on the schedule board for their route(s)
2. Add work ticket visits for services for which subcontractor auto-expense is set up for their company
3. Add time for crew members to visits that have been made available in the portal.
4. Add material quantities to visits that have been made available in the portal.

Crew member hours and material quantities entered into the *Subcontractor Portal* and accepted become available in the *Time Entry* screen of the *Aspire Desktop* for company employees. This document explains how subcontractors utilize the subcontractor portal.

### Device Authorization

The first time that a subcontractor logs into Aspire, the contractor must authorize the subcontractor's device allowing them future access from that device. The contractor must provide the subcontractor the following information for them to authorize their device: username (email address), password, and Company Code. The contractor may also provide a PIN for easier access in the future. Once the subcontractor has received this information, they can request device authorization by going to the standard Aspire URL, <https://app.youraspire.com> to display the Login screen as shown below.

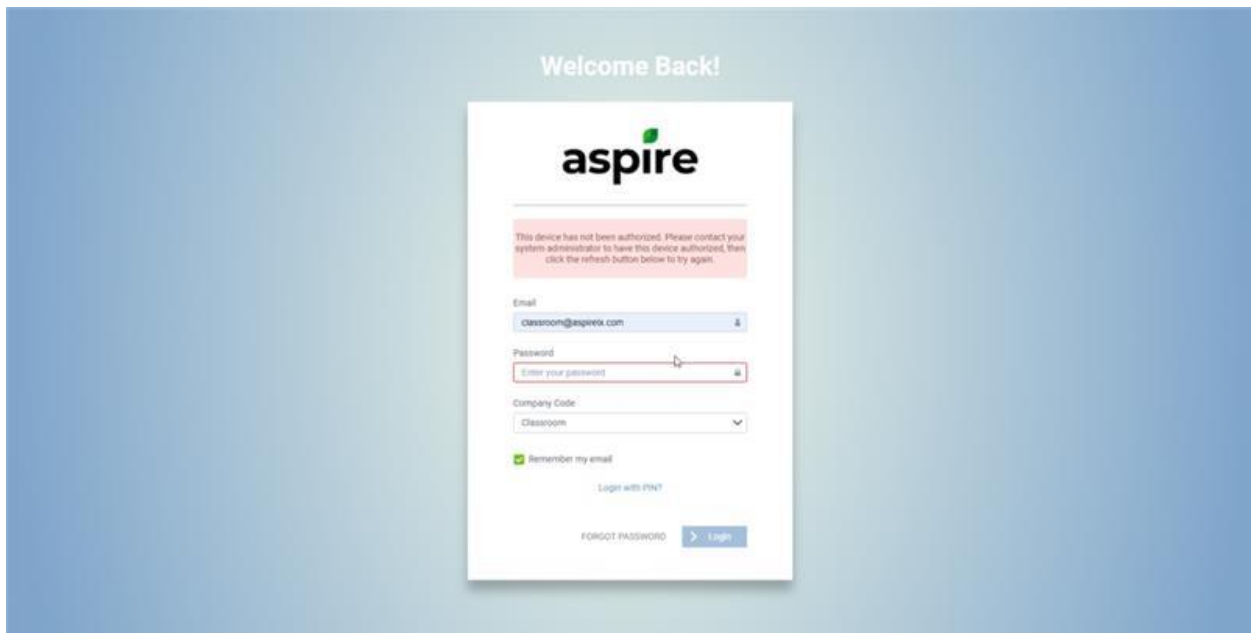


The screenshot shows the Aspire login interface. At the top is the 'aspire' logo. Below it are four input fields: 'Email' (with placeholder 'Enter your email address'), 'Password' (with placeholder 'Enter your password'), 'Company Code' (with placeholder 'Enter your company code'), and 'Device Name' (with placeholder 'Enter a name for this device'). Each field has a lock icon on the right. Below the fields is a checked checkbox labeled 'Remember my email'. At the bottom left is a link for 'FORGOT PASSWORD' and at the bottom right is a blue 'Login' button with a right-pointing arrow.

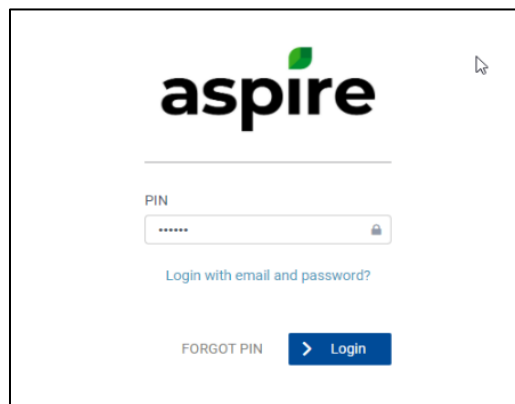
The subcontractor enters the following information into the Login screen:

Value	Description
Email Address	Email address agreed with contractor
Password	Password provided by contractor
Company Code	Company code that identifies the contractor. Provided by contractor.
Device Name	Name that uniquely identifies the device that is being authorized. Note that separate browsers on the same computer must each be authorized. Example device name: "Sam's Plowing Service – John Smith iPad"

Once the subcontractor has entered this information and presses the yellow arrow icon, Aspire will display the following screen:



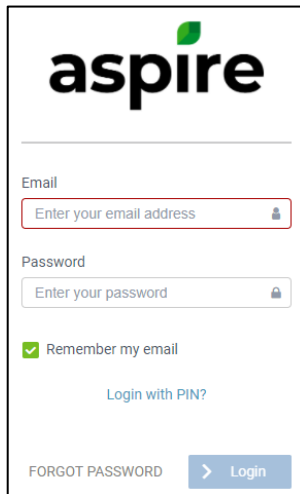
At this point the subcontractor must coordinate with the contractor to have the contractor enable the device. Once the subcontractor has been authorized by a system administrator, they can click the Refresh button to display the login screen:



## Logging into the Subcontractor Portal

The subcontractor can enter into the *Subcontractor Portal* by entering their PIN and clicking the yellow arrow icon depicted above.

Alternatively, if they wish to login using their email address and password, they can click the button labeled, *Click here to enter your email address and password to identify yourself on this device*. If the subcontractor clicks this button, the login screen will be displayed as show here.



## Description of the Subcontractor Portal

The *Subcontractor Portal* screen can represent three level of entries:


1. Routes for which the subcontractor provides service
2. Work ticket visits scheduled for the subcontractor under the routes
3. Work time or materials that the subcontractor has provided on the route

The image below shows the *Subcontractor Portal* screen for a subcontractor having three routes set up in Aspire: “Emanuel Plover Isaac – Columbia”, “Emanuel Plover Eliz – Columbia” and “Emanuel’s Shovelers – Columbia”. Only the first two levels are depicted in the example which shows what the screen would look like if four visits were scheduled for the subcontractor’s routes by the contractor.


	Start Time	End Time	Hours/Qty	✓	✗	%
<span style="border: 1px solid red; padding: 2px;">c</span> + Emanuel Plower Isaac - Columbia			0.00	✓	✗	
<span style="border: 1px solid red; padding: 2px;">d</span> + Nathan Jones Law - Snow Plowing 4.01-6" - 22679			0.00	✓	✗	%
<span style="border: 1px solid red; padding: 2px;">a</span> ▶ Emanuel's Shovelers - Columbia			0.00	✓	✗	
<span style="border: 1px solid red; padding: 2px;">a</span> ▶ + 1709_Bristol_Ridge_Court - Plow Truck - 22680			0.00	✓	✗	
<span style="border: 1px solid red; padding: 2px;">a</span> ▶ + Boones Hospital - Season Snow Contract - 22682			0.00	✓	✗	
<span style="border: 1px solid red; padding: 2px;">a</span> ▶ Emanuel Plower Eliz - Columbia			0.00	✓	✗	
<span style="border: 1px solid red; padding: 2px;">a</span> ▶ + Shakespeare's - Salt Per Ton - 22683			0.00	✓	✗	%
			<b>0.00</b>			

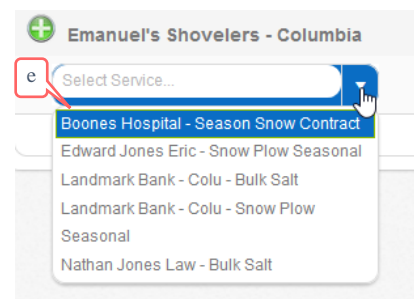
Visits are shown on the route if they have been scheduled on the *Schedule Board*. Additionally, if the *Enable tickets to be created from Sub Portal* option is enabled, the subcontractor can add additional visits for services they are set up to perform as described below. A *Partial Occurrence % icon* may be displayed next to services to be invoiced “Per Service” that allows the subcontractor to indicate what percent of effort was required to complete the work.

Levels within the hierarchy may be visually collapsed or expanded by clicking the small triangle icons<sup>a</sup> to the left of each route or work ticket/visit or in the header.

The *Export to Excel*  icon<sup>b</sup> in the footer exports the full content of the displayed day to an Excel spreadsheet.

### Adding Visits to a Route

If the *Enable tickets to be created from Sub Portal* option is enabled for the system, then the *Add Visit*  icon<sup>c</sup> will be available to the left of the routes. If the subcontractor clicks the *Add Visit* icon, Aspire adds a line-item underneath that route allowing the user to add a service performed by that crew. The line-item provides a drop-down listing opportunity services by property that the subcontractor may perform. Valid services available in the drop-down are determined as follows.




1. Services for contract opportunities are shown if a subcontractor auto-expense for the subcontractor has been established on the opportunity-service in an estimate for an existing opportunity, AND...
2. ...the associated opportunities are won, AND...

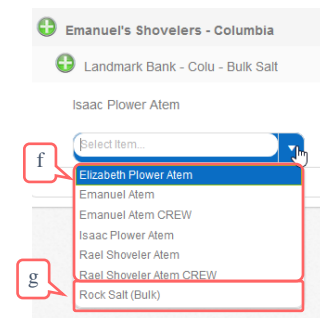
3. ...the date specified on the *Subcontractor Portal* screen is between the start and end dates of the opportunity, AND...
4. ...the opportunity service is either an *As Needed* service or has one or more tickets in open or scheduled status.

The text of each combo-box option<sup>e</sup> consists of the property name followed by the opportunity service display name.

Important Note: If the *Enable tickets to be created from Sub Portal* option is disabled, then the *Add Visit* icon will be disabled. The subcontractor can add additional visits for services they are set up to perform as described below.

### Adding Time or Materials for a Visit














When the subcontractor clicks the *Add Time or Material*  icon<sup>d</sup> (see above) just to the left of any displayed work ticket visit adds a line-item underneath that work ticket visit allowing the user to add either crew member time or T&M materials applied for that visit. The line-item provides a drop-down list containing whose options include...





1. **Subcontractor Crew Members**<sup>f</sup> – All contacts in the system that are tied to the subcontractor’s company that have no time on the selected work ticket during the specified day.
2. **Material Items**<sup>g</sup> – Any item identified by the contractor as a valid *Subcontractor Expense* for the selected service.

### Adding Time

When a crew member<sup>a</sup> has been added to a visit, the subcontractor can specify the time that the crew member spent. They can do so by changing the *Start* and *End* times, in which case Aspire will calculate the hours, or they can disregard the *Start* and *End* times to directly type in the hours.

	Start Time	End Time	Hours/Qty	
 Emanuel Plower Isaac - Columbia			0.00	 
 Landmark Bank - Colu - Bulk Salt			0.00	 
 Emanuel Atem	10/10/2018 12:00 AM  	10/10/2018 12:00 AM  	<input type="text" value="0.00"/>	 

Once the subcontractor has entered the proper hours for the crew member, they can accept the value by clicking the *Accept*  icon<sup>b</sup> next to the entry. The time must be accepted before the subcontractor logs out, or the time will be lost. If the subcontractor inadvertently adds a

crew member unintentionally, they can immediately remove it by clicking the *Delete Time*  icon next to the entry. Multiple added [material items](#) and time entries can be accepted or deleted simultaneously by clicking the appropriate *Accept/Delete* icon at the header level<sup>c</sup>, the route level<sup>d</sup> or the visit level<sup>e</sup>.



The *Start Time* and *End Time* fields allow the user to specify the date. This is intended to be used to enter time that spans two different days. If the user sets the date in this field to a date for which the contractor has closed the books, the *Subcontractor Portal* will not allow the subcontractor to save the time.

When time is accepted by the subcontractor, *Time Entry* becomes available to the contractor in Aspire.

### Adding Materials

When an item<sup>a</sup> has been added to a visit, the subcontractor can specify the quantity of that item that was applied by entering a number in the *Quantity* field.

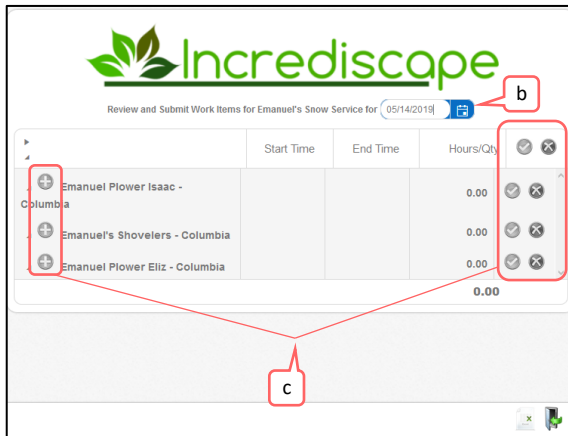


Once the subcontractor has entered the proper quantity, they can accept the value by clicking the *Accept*  icon<sup>b</sup> next to the entry. The quantity must be accepted before the subcontractor logs out, or the value will be lost. If the subcontractor inadvertently adds an item unintentionally, they can immediately remove it by clicking the *Delete Time*  icon next to the entry. Multiple added items and time entries can be accepted or deleted simultaneously by clicking the appropriate *Accept/Delete* icon at the header level (not shown), the route level<sup>c</sup> or the visit level<sup>d</sup>.

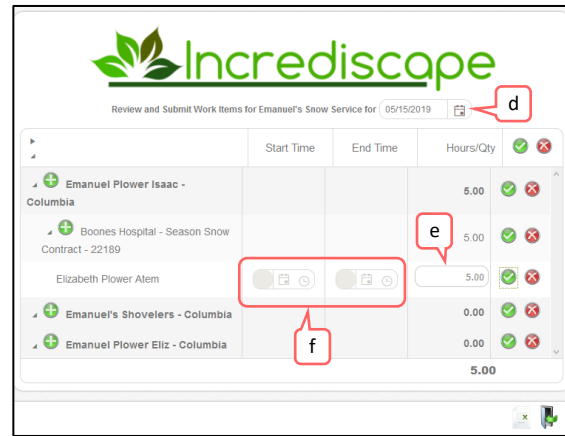
### Entering Time or Materials in a Closed Month

Aspire may be configured to allow the subcontractor to enter time in a month that is closed. This option will affect how Aspire behaves when the subcontractor sets the date at the top to a closed date as shown in the following table. When this option is disabled, and a subcontractor logs into the *Subcontractor Portal* and sets the date at the top of the screen to a month that is closed<sup>b</sup>, the screen will be disabled<sup>c</sup> so that they cannot add time or materials. When this option is enabled, and the user sets the date at the top of the screen to a closed month<sup>d</sup>, the screen is enabled, but the user is only allowed to directly enter the number of hours worked<sup>e</sup> – they cannot specify the start and stop times for the work<sup>f</sup>.

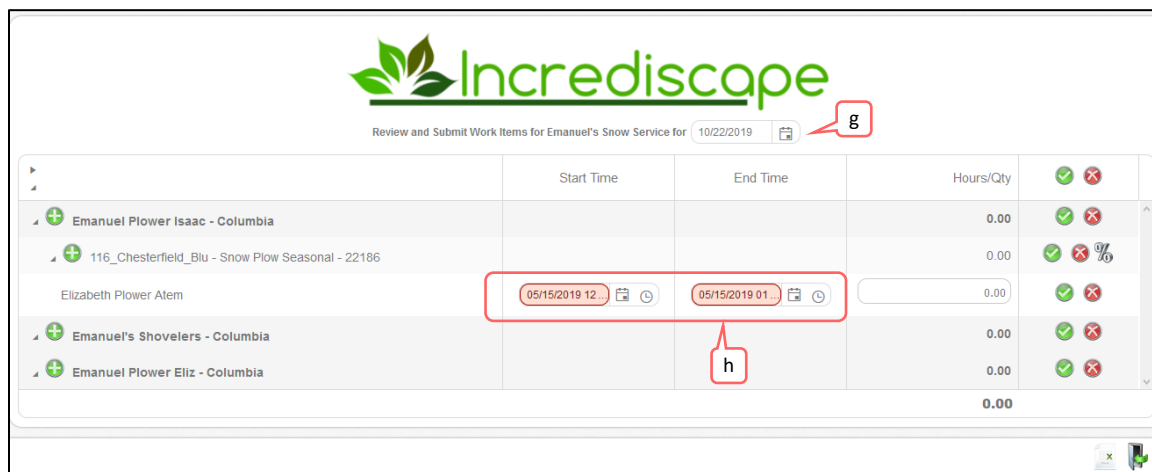
Option Disabled and Date Set to Closed Month



Option Enabled and Date Set to Closed Month



Additionally, if the option is disabled, and the user sets the date at the top to an open month<sup>g</sup>, but then enters a start or end time with a date that is in a closed month, Aspire will flag the entry red<sup>h</sup>, and prevent them from saving time to the closed month. [AL-4083]

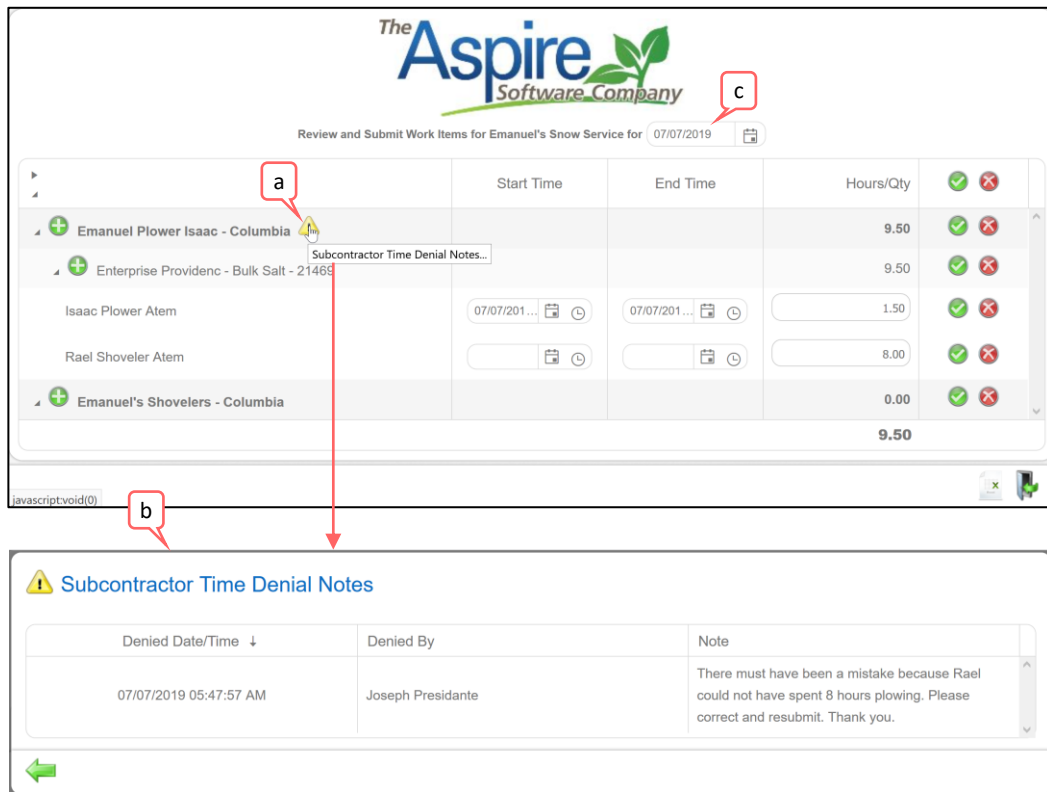


### Rejection of Time and Materials Entries by Contractor

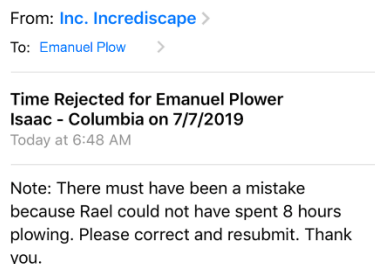
Once time and materials have been submitted to the contractor via the *Subcontractor Portal* as described above, the contractor will review the entries, and may accept or reject them. The contractor can accept or reject all entries submitted for a given day – they cannot selectively accept or reject individual entries. If the contractor rejects the entries, they are able to enter comments that become available to the subcontractor in the *Subcontractor Portal* explaining the reason and nature of the rejection.

Upon contractor’s rejection of subcontractor’s time and materials submissions, the subcontractor may be notified in the following ways:

1. When the subcontractor logs into the *Subcontractor Portal* after the rejection, rejected entries will no longer be read-only as they were immediately after submission. Rather, the subcontractor will be able to make corrections and resubmit. This allows the subcontractor to make corrections based on input from the contractor.
2. A *Subcontractor Portal Notes* ⚠️ icon<sup>a</sup> will be displayed next to the appropriate routes. Clicking this icon displays all notes<sup>b</sup> that have been included with denials for that route on the specified day<sup>c</sup> as depicted below.



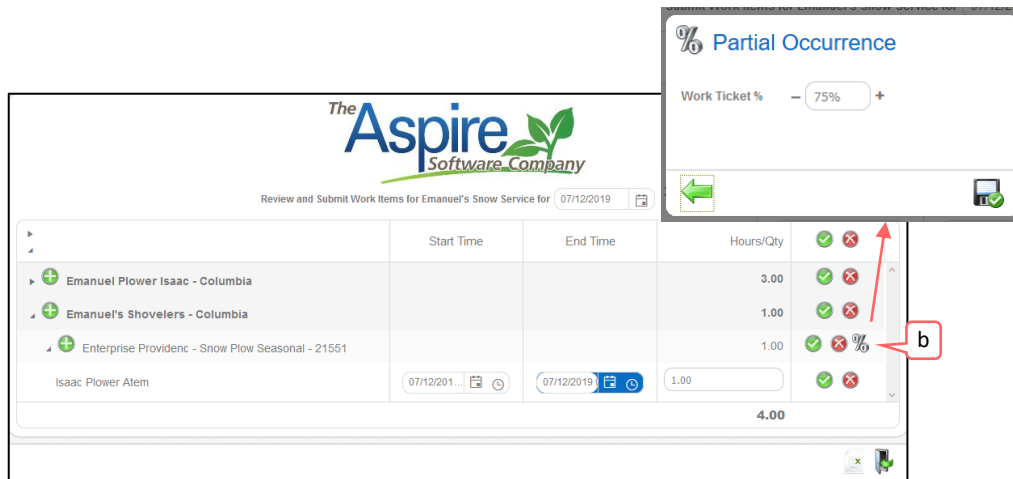
3. The contractor can set up Aspire so that the subcontractor will receive an email notifying them of rejections.





## Specifying Partial Occurrence

When a subcontractor is logged into the *Subcontractor Portal* and a work ticket is displayed whose services have the “Per Service” invoice type, Aspire displays the *Partial Occurrence* % icon<sup>b</sup>. Clicking this icon displays the *Partial Occurrence* screen allowing the subcontractor to specify the percent of actual work expected for the service as shown below. This value is made available to office staff to provide guidance when setting partial occurrence value for the work ticket.



## Logging Out of the Subcontractor Portal

To log out of the *Subcontractor Portal*, the subcontractor clicks the *Logout* icon<sup>a</sup> in the lower right-hand corner.

If the subcontractor has added time or material lines for which the values have not yet been accepted, Aspire displays a warning message with three options.

