

Benefits Module Training

ADMIN MANUAL

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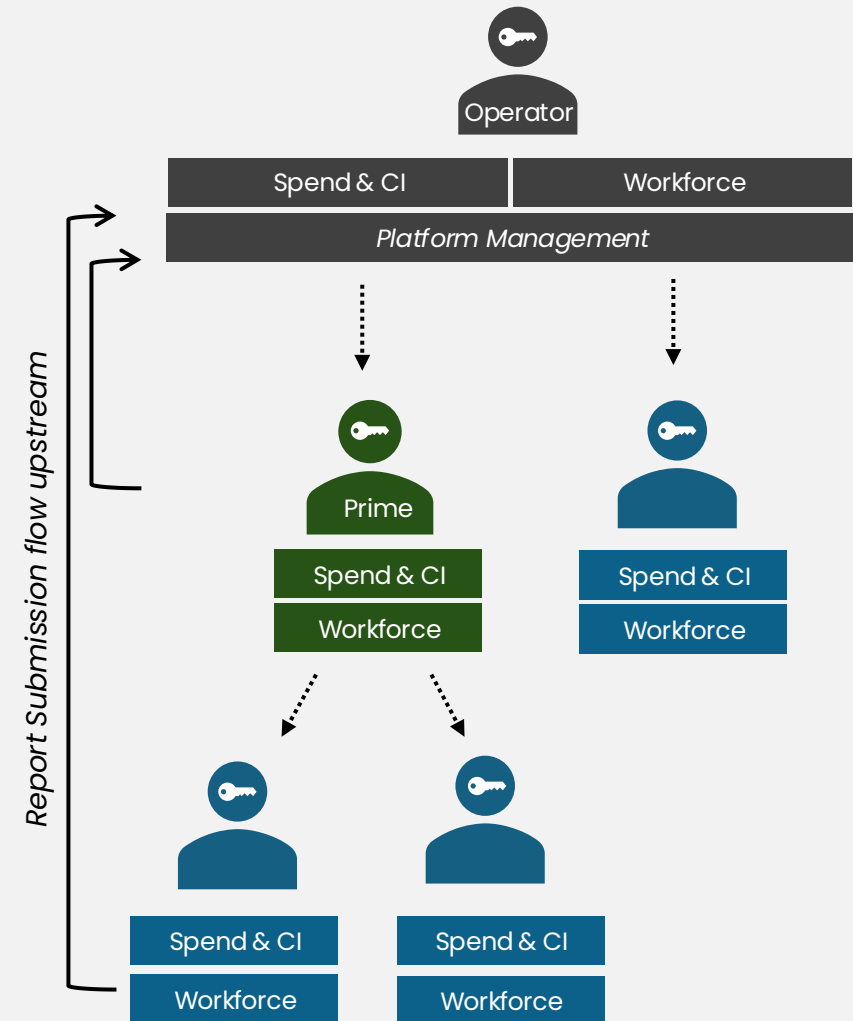
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1 Introduction

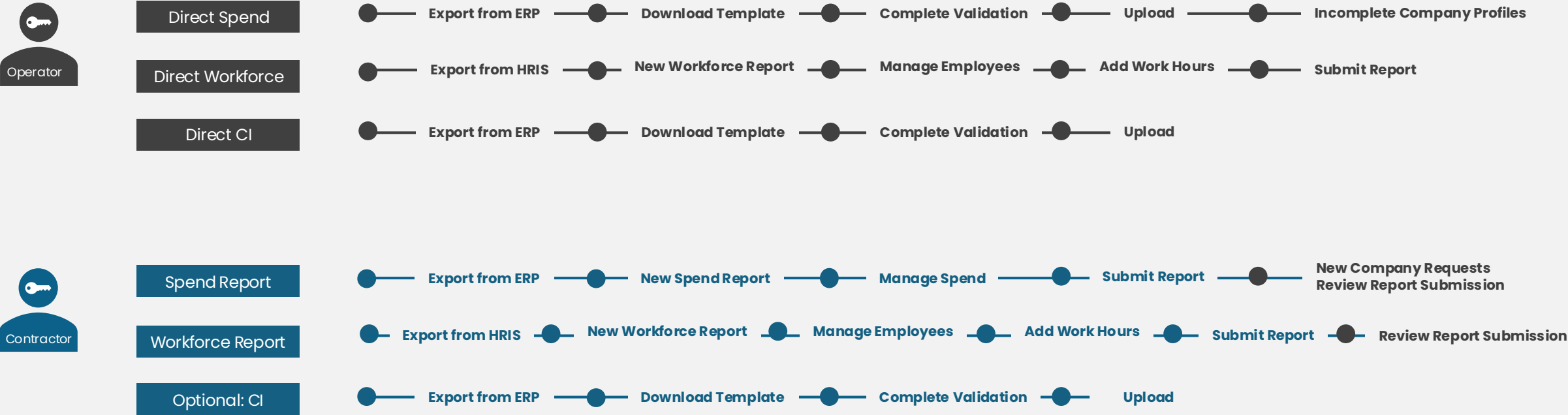
Overview of The Benefits Module and Data Collection

Overview of The Benefits Module

The Benefits Module provides operators and contractors with the framework to efficiently report on socio-economic requirements. Contractor data is consolidated and rolled up to project operators using monthly report submissions.



Data Collection Workflows

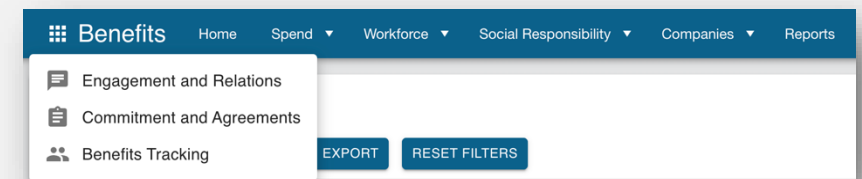


2 General Navigation

Navigation Menu, Inventory Screens, Record Views

Navigation Menu

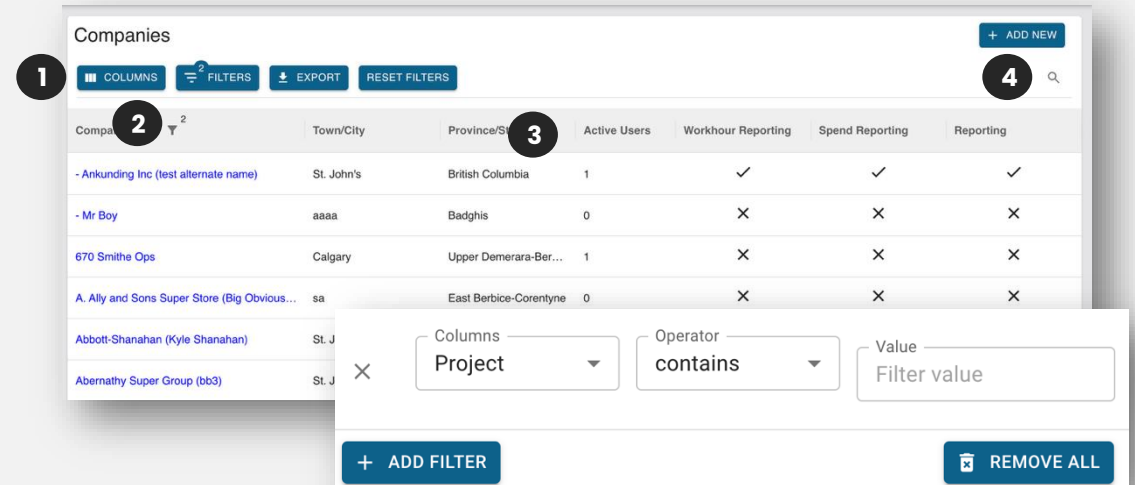
- **Waffle Navigation:** Move between platform modules.
- **Home Page:** View quick actions and outstanding Report Submissions.
- **Spend:** Includes Direct Spend and Spend Report Submissions.
- **Workforce:** Includes Workforce, Employee List, and Employees in Needing Review.
- **Social Responsibility:** Includes community investment and other regulator requirements.
- **Companies:** Full list of all companies within supply-chain.
 - **New Company Requests:** Manage new company profiles requested by reporting contractors.
 - **Incomplete Company Profiles:** Manage new company profiles created from direct spend.



Inventory Screens

The platform provides a standard structured system for managing records. Inventory Screens allow users to filter, sort, and export records.

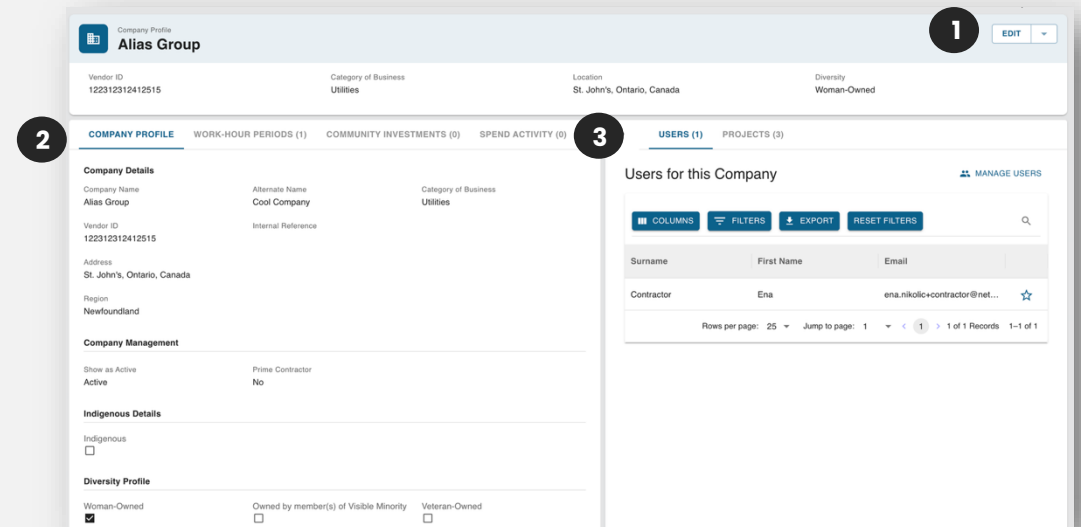
1. Manage which columns are visible by using the **Columns** button.
2. Filter using the icons on each **Columns** or the **Filter Button**.
3. To resize columns, click and dragging the edges of each column header.
4. To search, expand the **Search Icon**.
5. Create new record using the **Add New** on the top-right.



Record View/ Record Profiles

Each record displays all key information in a structured, easy-to-navigate layout:

- 1. Top Section:** Displays core details and quick action items in the **Quick Actions Dropdown**.
- 2. Details Tab:** Displays the core record fields such as date, status, project, communication type.
 - **Additional Tabs:** Navigate through related records and activity.
- 3. Right Sidebar:** Manage platform settings on the right card. This side bar will default open with active settings.



3 Internal Data

Managing Direct Spend, Workforce, and Community Investment Data

Direct Spend

INTERNAL DATA

Direct Spend

Getting Started:

- Setup a monthly export from your existing financial management systems (SAP).
- Ensure ongoing export meets monthly reporting requirements.
- Ensure person(s) responsible for ongoing management.

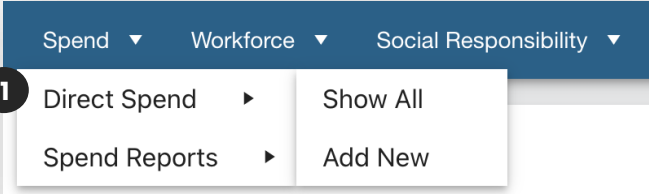
Monthly Reporting Requirements:

- Upload **Direct Spend** Records to the platform.
- Manage Incomplete Company Requests in the platform.

Step 1: Upload Direct Spend

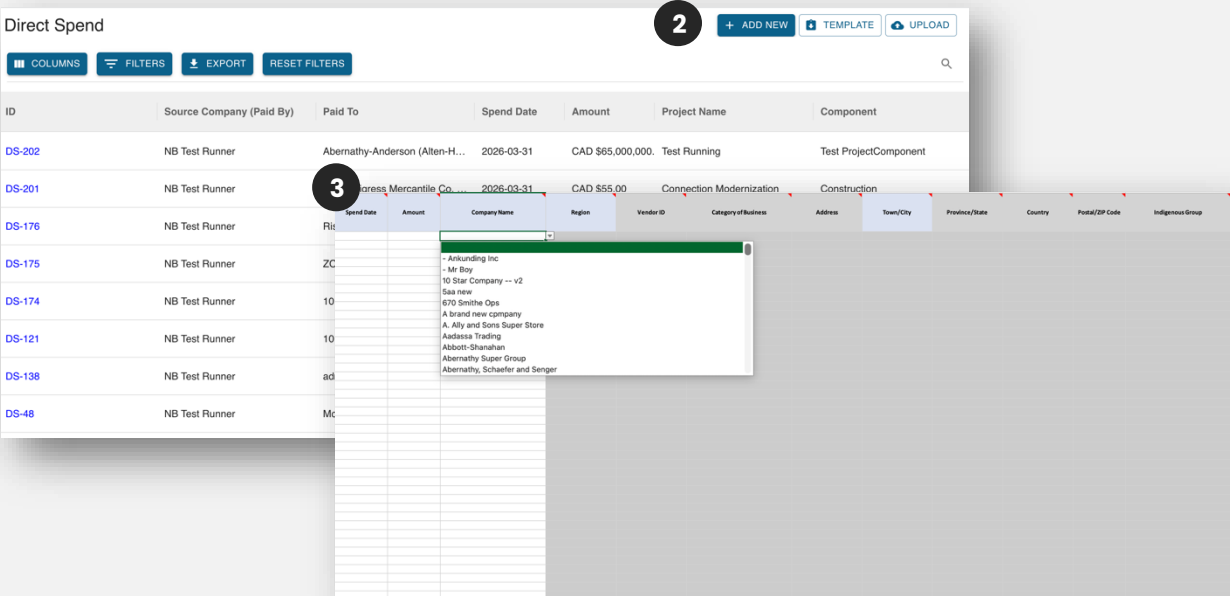
Key Action:

Itemized list of monthly expenditures. This is the pre-tax amounts paid to vendors.



Steps:

- 1. Select **Direct Spend** from the Navigation Menu.
- 2. To add spend records manually, select **Add New**.
To upload records, download the template.
- 3. Templates are *Dynamic* and will reflect platform inputs. Move data to template and upload file.



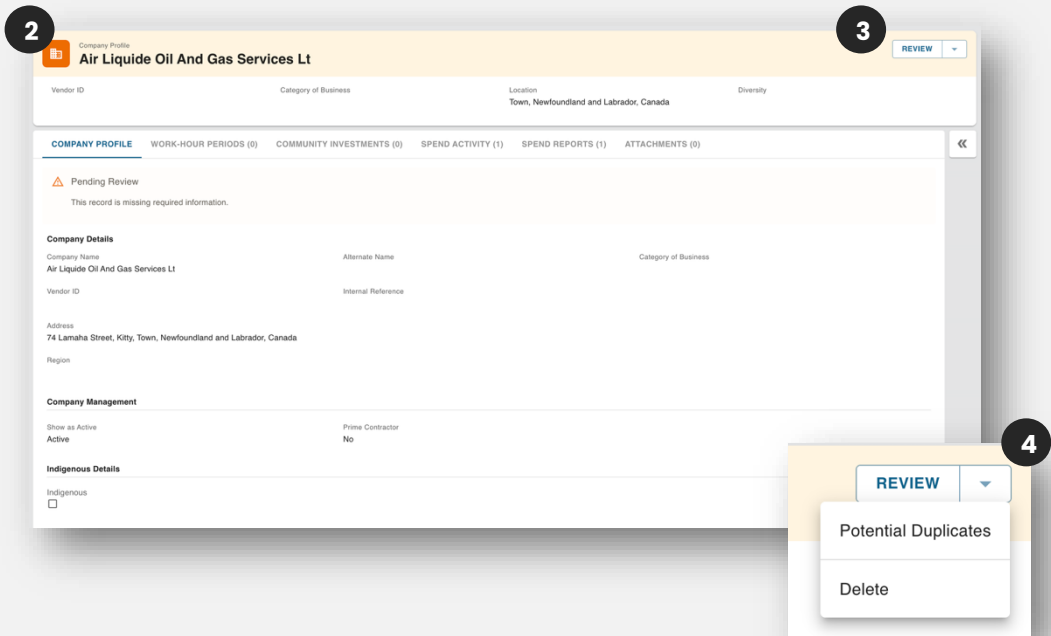
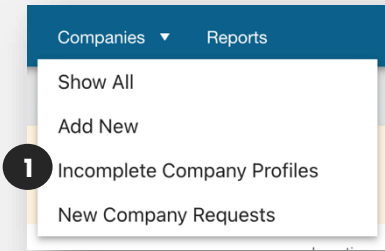
Step 2: Incomplete Company Profiles

Key Action:

Manage company profiles with missing information.

Steps:

- 1. Go to **Incomplete Company Profiles**. Select Company Name to open the profile.
- 2. A Company Profile in review will be highlighted in yellow with missing fields left blank.
- 3. Select **Review** to update missing fields and **Save Changes**.
- 4. To merge profiles, select the **Review Drop Down** and select **Potential Duplicates**.



Direct Workforce: Employees & Hours

INTERNAL DATA

Direct Workforce

Getting Started:

- Employees are tracked using unique employee codes or IDs.
- Do NOT use individual names as this may interfere with confidentiality.
- Match affiliation based on employee self-identification.
- Monthly export are required from existing HRIS management systems (Workday).
- Ensure export meets monthly reporting requirements.
- Ensure person(s) responsible for ongoing management.

Monthly Reporting Requirements:

- Create a Workforce Report for the month
- Upload Employee and Work Hours

Direct Workforce Report

Key Action:

All workforce data is collected through monthly Workforce Reports. This means direct workforce is submitted using the same format as contractors.

Workforce Report

W-95

RETURN FOR CORRECTIONS

Report Period

April 2026

Company

NB Test Runner

Project

Test Running

Status

Accepted

✓

Setup

✓

Manage Employees

✓

Work Hours

✓

Employee Training

✓

Employee Review

✓

Summary

Workforce Report Details

Instructions

This Workforce Report will collect Workforce information for this specific project. When entering Workforce data, include only Employees active on this project during the selected reporting period.

Company*

NB Test Runner

Project*

Test Running

Project Component*

Test ProjectComponent

Month / Year*

Apr 2026

BACK

SAVE

NEXT STEP

Job Progression

Definitions:

Track job progression and employee history.

Steps:

1. When a new job positions is uploaded to an existing Employee Profile, job history is created using the Start Date.
2. Alternatively, open an Employee Profile and change the Job Position.
3. To view history, select the Job History Tab. To make additional changes, select the kebab menu to open records.

Direct Community Investment

INTERNAL DATA

Community Investment

Key Action:

Itemized list of monthly community investment expenditures. This is the pre-tax amounts paid to organizations.

Steps:

1. Select **Social Responsibility > Community Investment** from the Navigation Menu.
2. To add records manually, select **Add New**. To upload records, download the template.
3. Templates are *Dynamic* and will reflect platform inputs. Move data to template and upload file.

4 External Data

Managing Indirect Spend, Workforce, and Community Investment

Contractor Management

SET UP EXTERNAL DATA COLLECTION

Contractor Management

Getting Started:

- Set monthly reporting requirements and internal person(s) responsible
- Remember to review overdue/late submissions to ensure contractor compliance.

Monthly Reporting Requirements:

- Adding any new users or reporting contractors
- Onboard reporting contractors
- Manage New Company Requests
- Manage Spend Report Submissions

Add Reporting Contractors



Admin > Users



Company Profile > Manage Users

Definitions:

- **Company (Contractor) Users:** External companies required to report. Access is granted on a per project basis. If contractors are expected to report on multiple project, ensure permissions reflect.

Steps:

1. Click **Add New** to create a new user.
2. To manage an existing user, select the **User's Name**.
3. To remove user access, disable the **User Active Check Box**.
4. Users can be managed through the Company Profile as well.

Users

+ ADD NEW

COLUMNS FILTERS EXPORT RESET FILTERS

Surname	First Name	Company	Email	Last Active
Ebadi	Abed	EcoBreeze Renewables	abed.ebadi@netbenefitsoftware...	2026-04-08

Add User

← BACK USER LIST

Position Title

First Name*

Surname*

Primary Phone

Alternate Phone/Extension

Email Address*

Company*

☒ User Active

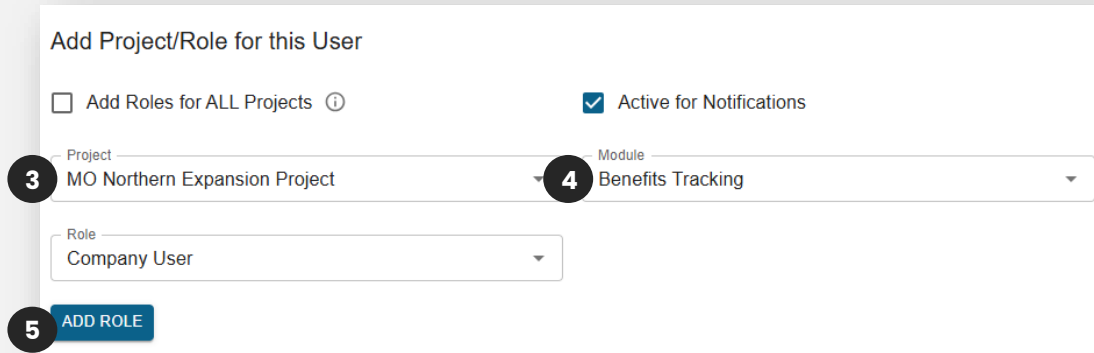
☐ Set as Primary User for Company

SAVE CHANGES

Add Reporting Contractors: Permissions

Create Company (Contractor) User:

1. Select an *External Company* from the dropdown.
2. Save changes.
3. On the card below, assign access based on Projects.
4. Ensure **Benefits Module** and **Company User** are selected from the dropdowns.
5. Select **Add Role** to save.



The screenshot shows a web form titled "Add Project/Role for this User". At the top, there are two checkboxes: "Add Roles for ALL Projects" (unchecked) and "Active for Notifications" (checked). Below these are three dropdown menus. The first dropdown, labeled "Project", has "MO Northern Expansion Project" selected and is marked with a black circle containing the number 3. The second dropdown, labeled "Module", has "Benefits Tracking" selected and is marked with a black circle containing the number 4. The third dropdown, labeled "Role", has "Company User" selected. At the bottom left of the form is a blue button labeled "ADD ROLE", which is marked with a black circle containing the number 5.

Manage Contracts

Important Note:

This step is required for clients managing Contractors through Contracts only.

Platform Overview:

1. Navigate to the Contracts Page.
2. For New Contracts, select Add New.
3. Ensure Company Name, Contract Title, and Reporting Requirements reflect contract details.

Manage Report Submissions

MANAGE EXTERNAL DATA

Step 1: New Company Requests

Key Action:

Manage new companies requested by reporting contractors.

Steps:

1. Go to **New Company Requests**. Select Company Name to open the profile.
2. A Company Profile in review will be highlighted in yellow with missing fields left blank.
3. Select **Review & Accept** to update missing fields and **Save Changes**. To find merge profiles, select **Merge**.
4. If a company is **Rejected**, enter a reason to share with your contractor.

The screenshot illustrates the 'New Company Requests' workflow in NetBenefit Software. It is divided into four numbered steps:

- Step 1:** A navigation menu under 'Companies' is shown, with 'New Company Requests' highlighted by a red circle and the number 1.
- Step 2:** The 'Company Profile' for 'Armstrong Inc' is displayed in a yellow review state. The profile includes fields for Vendor ID, Category of Business, Location, Diversity, Company Name, Alternate Name, Vendor ID, Internal Reference, Address, Region, and Indigenous Details. A red circle with the number 2 is placed over the profile header.
- Step 3:** The 'Review & Accept' button is highlighted with a red circle and the number 3. Other buttons visible are 'REJECT' and 'MERGE'.
- Step 4:** A modal dialog is shown with the text 'Enter a reason for rejecting this company. This action will permanently reject and remove the request.' It includes a text input field for 'Reject Reason' and two buttons: 'CANCEL' and 'REJECT'. A red circle with the number 4 is placed over the dialog.

Step 2: Review Report Submissions

Steps:

1. Open a **Spend or Workforce Report**.
2. To add feedback, fill in the field in the **Feedback Section** and click **Add**.
3. To Return for Corrections, expand the **Quick Actions Dropdown** and select **Return for Corrections**.

2

ACCEPT

Return for Corrections

1

Workforce Report

W-86

Report Period

April 2026

Reviewer

Ena Nikolic

Company

Best Contractors

Project

Test Running

Status

Submitted for Review

Setup

Manage Employment

Workforce Report Details

Instructions

This Workforce Report will collect Workforce information for the selected reporting period.

Company*

Best Contractors

Project Component*

Construction

Feedback Section

There is no feedback available for this step.

Add feedback

Write feedback...

Spend Report

SR-96

Report Period

April 2026

Company

Best Contractors

Project

Test Running

Status

Submitted for Review

Setup

Manage Spend

Community Investment

Summary

Spend Report Details

Instructions

This Spend Report will collect Spend information for this selected project. When entering data, include Spend for this project during the selected reporting period.

Company*

Best Contractors

Project*

Test Running

Project Component*

new name

Month / Year*

Apr 2026

Feedback Section

There is no feedback available for this step.

Add feedback

Write feedback...

BACK

SAVE

NEXT STEP

5 Admin Management

Projects, Components, and Users Profiles

Manage Users

SET UP PROJECTS AND COMPONENTS

Projects



Go to Admin > Projects

Functionality:

- Create new projects including project name, project code, description, and location information.
- Add project components such as construction and operation.
- Create/edit project targets.

Add Project

← BACK

PROJECT LIST

Project Name*

Project Code

Project Type

Project Lead

Location

Province/State*

Country*

Description*

Targets

Employees

0

Hours

0

Expenditures

0

Note:

To save emails for this Project, set a Project Code.

SAVE CHANGES

Adding a Project

- 1. Click **Add New**
- 2. Enter relevant project details.
- 3. Click Save Changes

Projects

1+ ADD NEW

COLUMNSFILTERSEXPORTRESET FILTERS

Project Name	Project Code	Region	Province/State	Country	Description
Cold Lake Project	CLP		Alberta	Canada	Mineral exploration project
RiverWest LNG Plant	RWLNG		California	United States	LNG processing plant in southern California

Add Project

← BACKPROJECT LIST

2

Project Name*

Project Code

Project Type

Project Lead

Location

Province/State*

Country*

Description*

Targets

Employees0Hours0Expenditures0

Note:

To save emails for this Project, set a Project Code.

3SAVE CHANGES

Managing a Project

- 1. Enter project details including name, project code, and location details. Click the pencil icon to edit.
- 2. Track project targets and baseline.
- 3. Add and manage project components.
- 4. Manage reporting companies involved with the project. Add new companies and turn on/off notifications.

View Project

1

Project Name*

Cold Lake Project

Project Code

CLP

Location

Athabasca

Province/State*

Alberta

Country*

Canada

Description*

Mineral exploration project

Targets

2

Employees

20%

Hours

0%

Expenditures

10%

Note:

To save emails for this Project, enter the following address in the BCC field:
CLP.nbdemo@comm.netbenefitsoftware.com

DELETE

3

+ ADD COMPONENT

Project Component

Component	Location		
Phase 0 - Pre-Work	Fort St. John		
Phase 1	Fort St. John		
Phase 2	Fort St. John		
Phase 3	Fort St. John		

COMPANIES (94) MILESTONES (2) ATTACHMENTS (0)

Companies Active For Reporting

4

+ ADD NEW

CLEAR FILTER

Company	Workforce Reporting	Spend Reporting		
10 Star Company	✓	✓		
ACME Corp.	✗	✗		
ACME Corp.	✗	✗		
AEDA Inc	✗	✗		
AEDA Inc	✗	✗		
Amal Services	✗	✗		
Amal Services 2	✗	✗		
Amal's Awesome Contractor	✗	✗		
Amanda's Pancakes	✗	✗		
Ames Civil Engineer	✓	✓		

1

2

3

4

5

10

items per page

1 - 10 of 94 items

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Manage Users

INTERNAL & EXTERNAL USERS

Users



Go to Admin > Users

- **Functionality:**
- Manage internal and external users.
- Assign user permissions for reporting.

Add User

←

BACK

USER LIST

Position Title

First Name*

Surname*

Primary Phone

Alternate Phone/Extension

Email Address*

Company*

User Active

Set as Primary User for Company

SAVE CHANGES

Creating/Removing User Access

Adding a User:

1. Go to **Users** and select **Add New**
2. Fill in user information
3. Select **Company**
4. Click **Save Changes**

Remove User Access:

5. Unselect the **User Active** checkbox.

Add User

[← BACK](#) | [USER LIST](#)

Position Title ²

First Name*

Surname*

Primary Phone

Alternate Phone/Extension

Email Address*

Company* ³

☒ User Active ⁵

☐ Set as Primary User for Company

⁴

SAVE CHANGES

Internal User Types

- 1. **Client Administrator:** Full access to projects, records, and reports with ability to change settings and platform configuration.
- 2. **Client Power User:** Users can add or edit records based on project permissions. However, users will not be able to access reports or admin settings.

Note: Power User roles appear at the bottom of a user profile when Client Administrator checkbox is not selected.

Add User

← BACK

USER LIST

Position Title

First Name*

Surname*

Primary Phone

Alternate Phone/Extension

Email Address*

Company*

NB Operator

1

☒ Client Administrator

☒ User Active

☐ Set as Primary User for Company

SAVE CHANGES

Add Project/Role for this User

☐ Add Roles for ALL Projects ⓘ

☒ Active for Notifications

2

Project

MO Northern Expansion Project

Module

Benefits Tracking

Role

Company User

ADD ROLE

External (Company) Users & Permissions

- 1. Contractor (Company) User:** Contractors assigned on a project level. If contractors are working on multiple projects, ensure permissions are reflected.
- 2. Managing Company Users:** Visit the Admin Menu or the Company Profile.

Add Project/Role for this User

☐ Add Roles for ALL Projects ⓘ ☒ Active for Notifications

Project MO Northern Expansion Project ▼ Module Benefits Tracking ▼

1 Role Company User ▼

[ADD ROLE](#)

USERS (4) WORK-HOUR PERIODS (18) COMMUNITY INVESTMENTS (1) SPEND ACTIVITY (13) SPEND REPORTS (27) PROJ >

Users for this Company **2** [MANAGE USERS](#)

	Surname	First Name	Email
☆	Lee	Cassandra Contractor	cassandra.lee+5@netbenefitsoftware.com
☆	Daniel	Dennis	dennis@daniel.com
☆	Matthews	Jacob	matt.adams.519+jm@gmail.com
☆	Contractor	Matt-Contractor	matt.adams+5@netbenefitsoftware.com

Benefits Module Training

ADMIN MANUAL