



Octayne PSA

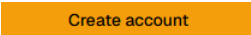
Onboarding Toolkit

Welcome to Octayne PSA

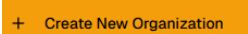
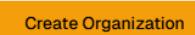
This onboarding toolkit is your step-by-step guide to getting started with Octayne PSA. Think of it as your go-to resource for navigating the platform—whether you're setting up your first project or adding new team members. We've designed it to be simple, comprehensive, and always up to date, so you never have to wonder what comes next. While our team is always here if you need support, this toolkit is built to empower you to move confidently through the setup process, troubleshoot with ease, and reference whenever questions come up.

1. Getting Started

Sign Up & Create Your Account

Start your 30-day free trial by clicking [here](#). Navigate to the top right and click . Fill in blank fields for **Email** and **Password**, select ☐ [Agree to Terms and Services](#), and then select . Once your account is created, you will be prompted to confirm your account via email.

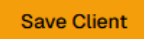
Create a New Organization

Once you're signed up and have verified your email address, click . Insert your organization's name along with your first and last names in the form, then click .

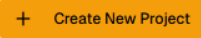
Add your Logo

Navigate to the menu on the left and select  **Settings**. Once in the **General Settings** page, click the , select a logo from your personal files, and click open. From there, your logo will load into the space provided and will be visible on the **Navigation Menu** and across invoices.

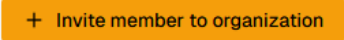
Set Up Your First Client

To create your first client, go to the **Navigation Menu** on the left and select  **Clients** . Then select  and complete the **Create New Client** form. Once complete, select  .

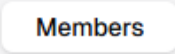
Set Up Your First Project

To create your first project, go to the **Navigation Menu** on the left and select  **Project Home** . Once at the **Projects** menu, select  , found at the top right of your screen. Once the **Create New Projects** form opens, select your newly created client from the **Client** drop down menu. Then, name your project in the **Project Name** field, provide an optional **Description** and select  .

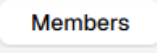
Invite Your Team

To invite team members to your organization, go to the **Navigation Menu** on the left and select  **Team Management** . Once the **Members** menu opens, select  . Fill out the invitee's **Email** in the space provided and select  .

Invite Team Members to Newly Created Projects

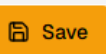
Once members have accepted the invitation to join your team via email, you can add them to individual projects. Use the **Navigation Menu** on the left side of your screen and select the project you would like to add team members to from the **Projects** submenu. Then on the top right of your screen, select  **Settings** . From the **Project Settings** menu select  . Then click  from the **Members** menu. A new **Modify Project Members** window will open with an **Organization Members** box and a **Project Members** box. Select the checkbox next to the **Organization Member** you are looking to add to the project, then select  to move that **Organizational Member** to the **Project Member** box. When you are done, simply click the  in the top right corner as changes have been reflected and updated across the platform.

Job Titles & Rates

Once members have joined your team, and have been added to your newly created project, you can begin setting up their hourly billing rates and job titles. To do so, select the project you created from the **Navigation Menu** on the left-hand side under the **Projects** section. Then select  **Settings** from the top right of your screen. Then navigate to the **Project Settings** menu and select  . From there, fill in the

empty fields for **Title** and **Rate**. Once rates have been updated, you will receive a  notification next to the change.

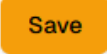
Add Billing Codes

Once members have joined your team, and have been added to your newly created project, you can begin setting up project billing codes that can be used as billing codes in your time entries. To do so, select the project you created from the **Navigation Menu** on the left-hand side under the **Projects** section. Then select  **Settings** from the top right of your screen. Then select **Billing Codes**. From the **Billing Codes** menu, click  until all the billing codes for your project have been entered. Once complete, select .

Add Board Fields

Once members have joined your team, and have been added to your newly created project, you can begin setting up project board fields that will appear as columns on your organization's timesheet. To do so, select the project you created from the **Navigation Menu** on the left-hand side of your screen under the **Projects** section. Then select  **Settings** from the top right of your screen. Then navigate to the **Project Settings** menu and select **Board**. From the Board menu, click  and fill in the blank fields for **Field Name** & **Field Type**. Once complete, select .

Add Timesheet & Expense Reviewers

To select Timesheet & Expense reviewers for projects, go to the **Navigation Menu** on the left side of the screen. Select a project from the **Projects** menu. Then, from the top right of your screen select  **Settings**. From the **Project Settings** menu, select **General** and navigate towards the bottom of the screen to **Timesheet Reviewers** and **Expense Reviewers**. Select a reviewer from the  drop-down menu. Once reviewers are selected, click .

Create a Project Logo

To create a project logo, go to the **Navigation Menu** on the left side of the screen. Select a project from the **Projects** menu. Then, from the top right of your screen select  **Settings**. From the **Project Settings** menu, select **General** and navigate towards the bottom of the screen to **Project Image**. Click the



, select a logo from your personal files, and click open. From there, your logo will load into the space provided and will be visible on the **Navigation Menu**.

2. Track Time & Expenses

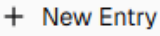
Create Your First Timesheet

To create your first time entry, select  **Time Ledger** from the **Navigation Menu**. Then at the top right of your screen, select . From the **Create New Timesheet** menu, select the appropriate

Date Range from the  drop down menu. Then click



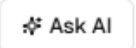
Create Your First Time Entry

To create your first time entry, select  **Time Ledger** from the **Navigation Menu**. From the **Timesheet** menu, select **View** from the timesheet you would like to access. Once in the **Timesheet Ledger**, select  from the top left menu. Then under the **Project** column, select a project from the dropdown menu. Then under the **Billing Code** column, select a billing code from the dropdown menu. Then select the day of the week and click .

From there, a **New Entry** form will appear. Complete the blank fields for **Time** and **Time Description** and then hit .

How to Use Ask AI When Creating a New Entry

From the **New Entry** form, navigate to **Time Description** field. Begin writing general text about the work

performed. Then select . Begin by typing in a short form time entry into the description. Then, from the **Ask AI** menu, select **Improve Description** to get a more comprehensively worded time entry, select **Proofread** to get a review for spelling and grammatical mistakes, select **Make Shorter** to trim the **Time Description**, or select **Make Longer** to expand the **Time Description**. Once satisfied with your entry,

select  to save.

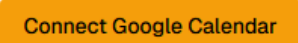
How to Submit a Timesheet

To submit a **Timesheet**, select  **Time Ledger** from the **Navigation Menu**. From the **Timesheet** menu, select **View** from the timesheet you would like to access. Once in the **Timesheet Ledger** and after you have completed entering your time for a given week, locate the  **Pending** icon in the central navigation bar. Select the dropdown and click  **Submitted**.

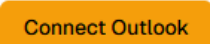
How to View Time Entries in Calendar View

To view time entries in **Calendar View**, select  **Time Ledger** from the **Navigation Menu**. From the **Timesheet** menu, select  **Calendar** from the slider in the top right corner.

How to Connect to Google Calendar

To connect your **Time Ledger** to your Google Calendar, select  **Time Ledger** from the **Navigation Menu**. From the Timesheet menu, select **View** from the timesheet you would like to access. Once in the **Timesheet Ledger**, select the integration icon . A window will appear to the right of your screen. Select the Google Calendar Icon . Then select . From there, follow the Google sign in instructions.

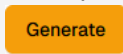
How to Connect to Microsoft Outlook Calendar

To connect your **Time Ledger** to your Microsoft Outlook Calendar, select  **Time Ledger** from the **Navigation Menu**. From the Timesheet menu, select **View** from the timesheet you would like to access. Once in the **Timesheet Ledger**, select the integration icon . A window will appear to the right of your screen. Select the Microsoft Outlook Calendar Icon . Then select . From there, follow the Microsoft Outlook sign in instructions.

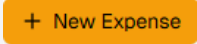
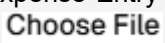
How to Connect to JIRA

To connect your **Time Ledger** to your Atlassian JIRA Board, select  **Integrations** from the **Navigation Menu** on the left-hand side on your screen. From the Integrations menu, click  **Connect** on the Atlassian JIRA tile. From the Atlassian JIRA form, click  and follow Atlassian JIRA sign in instructions.

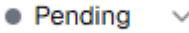
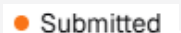
How to Use Note AI

To use Note AI, select  **Time Ledger** from the **Navigation Menu**. From the **Timesheet** menu, select **View** from the timesheet you would like to access. Once in the **Timesheet Ledger**, select the integration icon . A window will appear to the right of your screen. From the window, select the Note AI icon . Then select the **Project** you wish to allocate your time to from the project dropdown menu. Insert your notes into the **Note** text field. Once your notes have been entered, select, .

How to Create Expense Entries

To create expense entries, select  **Expenses** from the **Navigation Menu**. From the **Expenses** menu, select  from the top right of your screen. From the New Expense Entry form, select the **Date**, **Project**, **Expense Category**, **Amount**, and **Description**. Select  under **Receipt Upload** to attach a receipt. Once all forms have been updated, click .

How to Submit Expense Entries

Once an expense entry has been created, navigate to the expense menu and select the dropdown menu under the **Status** column . When ready to submit, select, .

3. Time & Expense Approvals

How to Review Submitted Timesheets

To review submitted timesheets, select  **Review Time & Expenses** from the **Navigation Menu**. From the **Review Time & Expenses** Menu, select  **Time Entries** from the top right of your screen. From the **Time Entries - Review Time & Expenses** menu, select **Review** for the weekly timesheet you choose to review. From there, use the **Status** column drop down menu to **Approve** or **Reject** submitted time entries.

How to Review Submitted Expenses

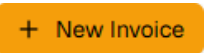
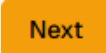
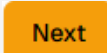
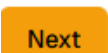
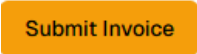
To review submitted timesheets, select  **Review Time & Expenses** from the **Navigation Menu**. From the **Review Time & Expenses** Menu, select  **Expenses** from the top right of your screen. From the **Expenses - Review Time & Expenses** menu, use the **Status** column drop down menu to **Approve** or **Reject** submitted expense entries.

4. Automated Invoicing & Billing

How to Add Billing Information to Invoices

Navigate to the menu on the left and select  **Settings**. Once in the **General Settings** page, select  **Edit Information** from the Billing Information box. Complete the empty fields in the **Billing Information** memo and scroll to the bottom to select . Once billing information has been saved, it will be included in the footer of all company generated invoices.

How to Create New Invoices

To create new invoices, select  **Billing & Invoice** from the **Navigation Menu**. From the **Billing & Invoices** menu, select  from the top right corner of the screen. From the **New Invoice Generator**, select **General** and complete the required fields for **Project**, **Template**, **Invoice #**, **Invoice Date**, **Invoice Start Date** and **Invoice End Date**. Once complete, select . From the **Time Entries** menu, select the timesheets you wish to include in your invoice (*note that only submitted and approved timesheets will appear in this menu*). Once all time has been selected, click . From the **Expenses** menu, select the expenses you wish to include in your invoice (*note that only submitted and approved expenses will appear in this menu*). Once all expenses have been selected, click . In the **Review** menu, take a moment to review that all information in the invoice is correct. When you are ready to save the invoice and send it to the client, click  **Download** and then click .

5. Reporting & Analytics

How to Access Digital Dashboard Reporting

To access digital dashboard reporting, select a **Project** from the **Navigation Menu**. From the **Project Summary** menu select  **Reports**. To change the date range of the digital dashboards, select  Jun 20, 2025 - Jun 27, 2025 from the top right of the screen. Select a start date and end date then click  **Search**.

How to Create Exportable Reports

To export reports, select a **Project** from the **Navigation Menu**. From the **Project Summary** menu select  **Reports**. To change the date range of the digital dashboards, select  Jun 20, 2025 - Jun 27, 2025 from the top right of the screen. Select a start date and end date then click  **Search**. To export that report click  **Export Report**.

How to Create Custom Exportable Reports

To export custom reports, select a **Project** from the **Navigation Menu**. From the **Project Summary** menu select  **Reports**. From the **Data Exports** menu, select  **Create new export**. From the **Create New Data Export** menu, create an **Export Name**, select the **Exports Type**, and select a **Date Range**. Once all fields have been completed, click  **Generate**.