# Octayne PSA

## Onboarding Toolkit

February 2026

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## 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 are setting up your first project or adding new team members. We have 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

### Create Your Account

To access your organization, first navigate to the login page here. On the login page, navigate to the bottom of the page and click Sign up . Fill in blank fields for **Email** and **Password**, select Agree to Terms and Services , and the select Create account . Once your account is created, you will be prompted to confirm your account via email.

### Access Your Organization

Once you are signed up and have verified your email address, select Join Existing Team from the welcome screen. Then, enter your **First Name** and **Last Name** and Click Accept . From there, **select your organization**.

### Create a New Client

To create a new client, go to the Platform **Navigation Menu** on the left and select Clients . Then select + New Client and complete the **Create New Client** form. Once complete, select Save Client .

## Create a New Project

To create a new project, go to the Platform **Navigation Menu** on the left-hand side of your screen. And select Projects. In the **Projects** menu, select + New Project, found at the top right of your screen. Once the **+ New Project** 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 Create Project. From there, follow the **Project-Onboarding** form, including adding a **Project Lead**, a **Start Date** / **End Date**, **Project Type**, **Project Budget**, **Project Budget Hours.** Then click Next.

## Invite Team Members to New Projects

Once members have been onboarded to your organization, you can add them to individual projects. In the **Project Onboarding** flow, 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, click Next.

Team members can also be added to projects through **Project Settings.** Use the Platform **Navigation Menu** on the left side of your screen and select Projects. Select a project from the **Projects** menu. Then, in the central **Navigation Menu**, select Settings. From the **Project Settings** menu select Members. Then click Add/Edit Members. From the **Organization Members** menu, 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, click the ✕ in the top right corner as changes have been reflected and updated across the platform.

## Add Team Member Roles (Positions) & 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. From the **Project Onboarding** flow, fill in the position title and hourly rate for each professional (you will receive a ✓ notification next to the change). Once all members have been added, select Next.

Team member roles & rates can also be managed and updated through **Project Settings**. Select Projects from the Platform **Navigation Menu** on the left-hand side of your screen. Select a project from the **Projects** menu. From the central **Navigation Menu**, click Settings. Then navigate to the **Project Settings** menu and select Members. From there, fill in the empty fields for **Position** and **Rate**. Once rates have been updated, you will receive a ✓ notification next to the change.

## Add Project Billing Codes

Once members have joined your organization, and have been added to your newly created project, you can begin setting up project billing codes that can be used in your team's time entries.

From the **Billing Codes** menu in **Project Onboarding** flow, click + Add Field until all the billing codes for your project have been entered. Once complete, select Save.

Billing codes can also be updated and managed through **Project Settings**. To do so, select Projects from the **Navigation Menu** on the left-hand side of your screen. Select a project from the **Projects** menu. From the central **Navigation Menu**, click Settings. Then select Billing Codes. From the **Billing Codes** menu, click + Add Field until all the billing codes for your project have been entered. Once complete, select Save.

## Add Board Fields

Once members have joined your organization, 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. From the **Board Field** menu in **Project Onboarding** flow, click + Add Field and fill in the blank fields for **Field Name** & **Field Type**. Once complete, select Save.

Board fields can also be updated and managed through **Project Settings** To do so, select Projects from the **Navigation Menu** on the left-hand side of your screen. Select a project from the **Projects** menu. From the central **Navigation Menu**, click Settings. Then select Board. From the Board menu, click + Add Field and fill in the blank fields for **Field Name** & **Field Type**. Once complete, select Save.

# 2. Tracking Time & Expenses

## Create Your First Timesheet

To create your first entry, select Time Ledger from the Workspace **Navigation Menu**. Then at the top right of your screen, select + New Timesheet. From the **Create New Timesheet** menu, select the appropriate **Date Range** from the Select a date range drop down menu. Then click Submit.

## Create Your First Time Entry

To create your first entry, select Time Ledger from the Workspace **Navigation Menu**. From the **Timesheet** menu, select View from the timesheet you would like to access. Once in the **Timesheet Ledger**, select + New Entry from the top left menu. 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 (note: project and billing codes will be assigned to you from your organization's administrators). Then select the day of the week and click + ADD. From there, a **New Entry** form will appear. Complete the blank fields for **Time** and **Time Description** and then hit Submit.

## How to Submit a Timesheet

To submit a **Timesheet**, select Time Ledger from the Workspace **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 Workspace **Navigation Menu**. From the **Timesheet** menu, select Calendar from the slider in the top right corner.

## How to Connect to Microsoft Outlook Calendar

To connect your **Time Ledger** to your Microsoft Outlook Calendar, select Time Ledger from the Workspace **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 Connect Outlook. From there, follow the Microsoft Outlook sign in instructions.

## 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 Ask AI to get a more comprehensively worded time entry**.** Once satisfied with your entry, select Submit to save.

## How to Use Note AI

To use Note AI, select Time Ledger from the Workspace **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, Generate .

## How to Create Expense Entries

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

## 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 Pending . When ready to submit, select, Submitted .

# 3. Time & Expense Approvals

## Review Submitted Timesheets

To review submitted timesheets, select Review Time & Expenses from the Workspace **Navigation Menu**. From the **Review Time & Expenses** Menu, select Time Entries. 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.

To configure **Compliance Review,** select Configure review rules at the bottom right of the screen of the timesheet review page. Within the **Review Rules Settings** form, toggle the review settings you which to enable. One complete, select × in the top right of the form and enables rule settings will take effect.

To review items in **Compliance Review,** select the flagged issue and make manual adjustments to entry statuses in questions. Or click Ignore to move to the next flagged issue.

## How to Review Submitted Expenses

To review submitted timesheets, select Review Time & Expenses from the Workspace **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. Invoicing & Billing

## Create New Invoices

To create new invoices, select Billing & Invoice from the Workspace **Navigation Menu**. From the **Billing & Invoices** menu, select + New Invoice from the top right corner of the screen. From the **New Invoice Generator**, complete the required fields for **Project**, **Format**, **Components**, **Invoice #**, **Invoice Date**, **Invoice Start Date** and **Invoice End Date**. Once complete, select Next. 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 Next. 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 Next. 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 Submit Invoice.

## Sync Projects & Invoices to / from QuickBooks

To pull invoices from QuickBooks, select Billing & Invoice from the Workspace **Navigation Menu**. Then select ··· next to the + New Invoice button on the top right of your screen. In the drop down, select Sync QuickBooks. In the window that appears, select Sync Invoice on the invoice you would like to import. From there, the invoice will be imported into Octayne for collections tracking.

To push invoices from Octayne to QuickBooks, first you need to **Sync Client** in Octayne with the Customer in QuickBooks. To sync a client with QuickBooks, go to the Platform **Navigation Menu** on the left and select Clients. Select ··· next to + New Client at the top right hand of your screen. Then from the dropdown menu, select Sync QuickBooks. In the window that appears, select the checkboxes next to the clients you would like to import. Then click Import. All client settings fields will automatically link upon importing.

# 5. Reporting & Analytics

## View Organizational Utilization

To access organizational utilization by role, visit **Organizational Settings** to add **Organizational Roles**.

Once roles have been set up, select Utilization from the Workspace **Navigation Menu.** Use date filters, to isolate periods for review.

## Access Project Dashboards (Project Health / Collections)

To access project dashboards, select Projects from the Platform **Navigation Menu**. Then select a project. From there you will be brought to the **Project Health - Project Dashboard**. Use the central Navigation Menu to toggle between **Project Health** and **Collections** dashboards**.** As projects are staffed through **Planner,** project health metrics will automatically populate. As invoices are created and synced with QuickBooks, Collections tracking will automatically populate.

## Project Planner

To access the **Project Planner** to staff teams, select Projects from the Platform **Navigation Menu**. Then select a project. From there you will be brought to the **Project Health - Project Dashboard**. Use the central Navigation Menu and select Planner. To set up the planner by **Resource** or **Task Type** (Billing Code), navigate to Settings in the top right-hand corner. Under **Group By,** select Task Type to view the Gantt Chart by Billing Code or Member to view the Gantt Chart by professional. Use the check boxes to customize your view to include **Booked** hours, **Approved** hours, **Remaining** hours, and **Invoiced** amounts for Tasks and Members.

To change view between **Gantt** style planning and **Table** planning, use the Gantt Table toggle to switch between views.

To add **Members** to a **Task Type**, select the gear icon in the **Resource** column to the left of the screen.

To add **Task Types** to a **Members**, similarly, select the gear icon in the **Resource** column to the left of the screen. Once selected, click Save.

To use the Gannt planner, hover over a date next to a **Member** or **Task Type** and click + create a new bubble. From there, drag the bubble to set workstream start dates and end dates. Clicking on the bubble will allow you to set **Date Ranges** and **Hourly Allocations** by **Member** (left side of form). The right side of the form will automatically populate with planned commitments and conflicts.

## Setting Billing Code Budgets for Planner

To set budgets by **Task Type / Billing Code,** select Projects from the Platform **Navigation Menu**. Then select a project. From there you will be brought to the **Project Health - Project Dashboard**. Use the central Navigation Menu and select Settings. In the submenu below, select, Billing Codes. In the **Billing Codes** menu use the Advanced toggle. When enabled, enter Start Dates, End Dates, and Budgets in the Billing Code form and click Save. From there, all billing codes will be tracked across **Planner** and **Project Health** Dashboards automatically.

## How to Create Exportable Organizational Reports

To create organizational reports, select Reports & Exports from the Workspace **Navigation Menu**. Then select + New Export from the top right of your screen. In the form, select all projects for reporting. Then complete the fields for **Export Name** and **Export Type**. Finally, select a Date Range and click Generate.

# 6. Team Management

## Access Team Member Dashboards & Settings

To access team member dashboards and settings, select Team Management from the Platform **Navigation Menu**. Then select a team member to access their dashboard. To manage team member settings, click on the team member and then navigate to Settings in the central navigation menu. Once fields for **Office Location, Practice Areas, Teams**, have been created in organizational settings, use the dropdown menus to select the appropriate fields for team members. Settings for **Employee Type, Position, Manager, Hire Date** and **Compensation** are independent of Organizational settings.

## Manage Team Member Permissions

To access team member dashboards and settings, select Team Management from the Platform **Navigation Menu**. In the central navigation menu, select Permissions. Select the professional you which to manage and click in the column labeled **Role**. From there, select the appropriate permissions level and click × to return to the permission page.

## Manage Organization Invites

To add new hires to your organization on the platform, select Team Management from the Platform **Navigation Menu**. In the central navigation menu, select Org Invites. From there, select + Invite member to organization. Enter their email address and click Invite User. From there, an invitation will be sent to their email with instructions to access your organization.

# 7. Organization Settings

## Update Organization Name & Logo

Navigate to the Platform **Navigation Menu** on the left and select Settings. Once in the General settings page, you can amend your organization name and logo.

## Billing Information

To add billing information to invoices created on Octayne, navigate to the Platform **Navigation Menu** on the left and select Settings. Then select Billing from the central **Navigation Menu**. Complete the billing form and select Save Billing Info. Once billing information has been saved, it will be included in the footer of all company generated invoices.

## Add Roles & Positions

To add **Roles & Positions** for classification in team member profiles, navigate to the Platform **Navigation Menu** on the left and select Settings. Then select Roles from the central **Navigation Menu**. Under **Role Name**, add a role (ex: Managing Director). Under **Target %**, add a utilization target % for each role. Then click Save.

## Add Office Locations

To add **Office Locations** for classification in team member profiles, navigate to the Platform **Navigation Menu** on the left and select Settings. Then select Locations from the central **Navigation Menu**. Under **Location Name**, add a location (ex: New York). Then click Save.

## Add Practice Areas

To add **Practice Areas** for classification in team member profiles, navigate to the Platform **Navigation Menu** on the left and select Settings. Then select Practice Areas from the central **Navigation Menu**. Under **Practice Area Name**, add a Practice Area (ex: Energy, Advisory Services, etc.). Then click Save.