# Quick start Guide

Hi, I'm James Baker, the founder of Varicon. After a decade working in civil construction, we created Varicon to make cost management easy for civil contractors like you. Congratulations on your decision to improve your cost management. You're now among the leading contractors in our industry and can look forward to simpler operations, better decision making, and more confidence in your company's financial performance. Varicon is designed specifically for busy civil construction contractors who understand how critical it is to manage their cost effectively, but don't have the time to implement complicated systems. With varicon, you can expect to streamline your data management. With our connected cost management approach, you'll eliminate a lot of duplication of data, improve governance and approvals processes. We make this easy onsite and in the office for critical processes, including time sheets, supply management, and site diaries. Provide real-time data for your payroll and accounts payables teams, eliminating hours every week in paying your people and managing your supply costs better. Manage your contracts and get paid faster with varian's progress and variation claims, and give previously unavailable insights into the financial performance of your projects. Varicon works by connecting your field operations and office personnel through a single easy to use cloud-based source of data. We make this easy at the job site to capture data to save time for your field-based people so that they can focus on delivering projects. In the office, we eliminate duplication of data and give previously unavailable insights so you can make better decisions to keep your projects on track and ensure you have confidence in the overall financial performance of your business. We know you're busy and every minute of your day is important. Our onboarding process is designed to win you back time each step of the way. Each phase of onboarding builds on previous stages to give you even more value from your subscription. This is your typical onboarding process, and your kickoff meeting will confirm your priorities and can modify this based on what is most critical for your business. Each phase includes a Train the trainer session to ensure that you are equipped to pass on this information to the rest of your team. In this initial phase, we get you set up properly. This involves getting some information about how you run your cost tracking and exporting some information from your accounting software. We'll provide you with comprehensive instructions to keep this easy for you. In phase two, we roll out time sheets and payroll automation. Your workers can submit their time sheets through their mobile phones or, if you prefer, a tablet on the job site using their secure personal pin code. Time sheet approvals can also be done by their supervisor on a mobile phone or computer. This phase saves a lot of time for your payroll team. We code you at your payrolls for all of your team members, whether they're on wages, salary, or even subcontractors. We can manage them all through the Varicon system. For employees, we create a direct export to your accounting software to automatically create pay items for ordinary time, overtime, and any employee allowances. For subcontractors, you can send them a summary of all their approved hours to make it easier for both of you to manage their payment. We use this same information later on for your project cost tracking. In phase three, we improve your accounts payable functions. This includes creating supply purchase orders, receiving goods on site, tracking supplier costs, and reviewing and approving supplier invoices. The purchase order module allows you to easily create purchase orders for your suppliers. If you're using Xero or MYOB, you can directly connect Vera Con purchase orders to your accounting software. Varicon gives you the flexibility to decide who can create, approve, and close purchase orders within your team. When you capture your delivery dockets through Varicon, they're automatically connected to the supplier purchase order and to your project. Cost tracking Docker capture is designed to be easy for your onsite teams. Now, this phase solves multiple problems for accounts payable teams. Since dockets are captured at the time of delivery, lost dockets are no longer a problem. Immediately upon receipt of materials on site, you have visibility into committed costs that you can expect to be invoiced for. This enables better management of cash flow. Then, when you do receive a supply invoice, all of this associated dockets plus onsite team comments are available. This allows accounts payable teams to easily identify any overcharges from suppliers, and if invoices are correct to confidently proceed to payment. The deliveries captured in phase three will be used in phase six for tracking your project costs. Now, a lot of your site diary is already auto-filled with data captured from time sheets and dockets. The remaining data is then entered directly into the site diary. The Varicon site diary can be accessed from the mobile or tablet app or from a computer web browser. It's highly customizable so you can build your site diary the way you want it. The RAC site diary ensures consistent capture of critical information across all of your projects available to all key people in your team when required, as well as serving an important role for internal documentation. This information can be important as evidence for justifying progress and variation claims. Now talking about progress and variation claims within Varicon, it's easy to make these claims and ensure that they're completed correctly and according to the Security of Payment Act in your state. As you progress through your project, each claim builds on previously approved claims and any variations approved in between these claims. By managing your claims at variations through our single source of truth, we ensure that all relevant internal stakeholders have access to this information and avoid having different versions floating around. In this phase, you'll see significant improvements in your contract management. At phase six, we bring all of this together. In this final phase, we start to track your actual costs against your budget to ensure your projects are performing well for each item.

In this video, I'm gonna show you how to complete time sheets in the Varicon mobile app. So before you can access this, your someone in your company needs to add you to the company's account. Typically, that would be your supervisor or a manager. And when they add you, you should receive a text message from Varicon, like the one in this image. So if you don't receive this, either it's gone to your spam folder or perhaps your phone number has been entered incorrectly. So if you don't receive it, then check your spam folder or go back and speak to your supervisor or manager. And then when you receive it, you can download the app either by clicking this link or opening up the iPhone or the Android store and searching for Varicon. So I'm gonna click on the link and that's gonna take me to the iPhone store because I'm using an iPhone. And then I'm gonna download this app. Now I'm gonna open it up. The first thing that the Varicon mobile app is gonna ask is for you to put in your workspace name. And if we go back to our text message, You'll see that the workspace name is listed here. So it'll say your workspace name is, and then the name of your company's workspace. And in this screen, typically you're gonna enter time sheet login. So if you only need to do time sheets, that's what you'll do. If you are, uh, say you have to do approving time sheets, finishing the site diary, capturing dockets, then you'll have to go into the admin login and you'll do your time sheets through there. But for now, we're just gonna stick with the time sheet login. So I'll click in here, and then the system's gonna ask you to put in your phone number and your account pin. So that's the account pin that you would've received in the text message. And so now that I've logged in, the first thing it's gonna do when I first log in, Varicon would like to send you notifications. And by choosing allow on this, it will ensure that you are notified if anyone changes your time sheets to give you the opportunity to actually let them know if you disagree with the changes that have been made. So we strongly recommend that you do allow this. And you may also be asked if you wish to share GPS location with Varicon. And so this will only capture your location when you're clocking in and clocking out and your location isn't tracked outside of that. So now that we're logged in, the first thing that we're gonna do is change the pin code to something that you are gonna remember. So if you click on the three horizontal lines up in the top left, it will open up the settings. So we'll click settings and then go into account settings. And then from here, click account pin, and then we're gonna enter the pin that was in your text message, and then enter the new pin code that you want and confirm it. And then we'll click on change. And so now that's been updated and we can go and create your first time sheet. So to create a time sheet, we're gonna click on clock in on the orange button and see here it's asking me whether I wanna share my location. And so we recommend that you choose, allow while using app so that we can capture a record of your location when you clock in and when you clock out. And so to choose the project you you're working on, you'll click on the box project. And if you've been assigned by your company to a specific project, it's going to show up in these assigned projects. But if you haven't been assigned, then you can click on other projects and you'll see the list of all the company, all the projects for your company. So let's choose our project and then click clock in. And we're now finished until it's time to clock out at the end of the day. To clock out, we'll go through a similar process, click on the orange clock out button, and then depending on your company's setup, you'll be able to change your clock in, clock out and break time. So let's change this to clock out to and we've taken a 30 minute break. Can put in any comments if I've got any attachments. So for example, I might have a day works docket to attach. I can click on here and then click on the camera to take a photo of, uh, of whatever documentation needs to go with my time sheet. And then if I'm using equipment or allowances, I can choose them here. So let's choose some equipment I'm using. Let's say I'm driving this excavator. If there's an attachment, then it will show that in my list of attachments, and I've added that. And if I'm entitled to any allowances, then they'll show up in this list here. So let's say I'm, uh, living away from home, I'll sign that. And then the last thing to do is to click on the orange confirm button at the bottom of the screen. And now it's created a draft time sheet. As you can see, this one is in gray because it hasn't been approved yet by, uh, by my supervisor. And then once it has been approved, it's going to go to green, like this one, and it'll show the clocked time, which is what I've submitted and the approved time, which is what's been actually approved by my supervisor. And so this is the process here for creating a time sheet within Varicon.

I'm gonna show you how to get started with the admin login from the Varicon Mobile app. This view is typically used by supervisors, engineers, project managers, and managers. You can also access all this functionality from a web browser. So before you get started, you'll need to have someone in your company admin add you as a user within Varicon. This is a different login than the one you just used for completing time sheets. So you should receive an email similar to this when you've been added, and then you can set yourself up as an active user. So I'll just click on set Password, which will open up a web browser, and then you can put in your password and confirm it to get started. So I've just created a password and now I can go into the Varicon app and log in. So the first time you log in, you'll need to put your workspace name in, and then that'll bring you to the admin and time sheet login. And so we're gonna click on admin login and then put in our email address and password to get started. And you'll see that at the moment there's no projects assigned to me. And the reason for this is that you need to first log in to activate your user account. And then after this, your admin team can start assigning you against projects.

I'm gonna show you how to capture delivery dockets within the Varicon mobile app. Capturing delivery dockets through the mobile app ensures that in real time, your accounts payable team know what costs have been occurred at the job site even before a supplier invoice gets received. And also it ensures that those costs tracked against your project cost tracking. So we're gonna go into the docket module to show you how this is done. In the docket module, we've got a list of all the dockets that we've captured, and we're gonna click on the plus icon down in the bottom right corner to capture a new docket. So I'll click on add image, and either we can get a photo from our photo library that we've captured previously or pull up our camera and then take a photo of our docket And then we can fill in all the docket information. Now in the situation where there's any missing information, you can just click on add and then save as incomplete. And then this docket can be completed later by someone in your admin team, who can link it back to a purchase order and ensure it's properly allocated. In the case where you do have that information and there's a purchase order already existing, then we can add it in here. So we'll put in our docket number. If there is no docket number, you've just got a delivery without a delivery docket, you can just put in the job number and the delivery date, so that it fills this filled in. And then we're gonna go and choose our supplier. And then once we've chosen our supplier, automatically we can choose from the purchase orders for that supplier. So we'll choose this purchase order, and then it brings up the delivery items on that purchase order. If there's an item on the purchase order that you haven't received, then you can just delete that and then just look at the one that you have received. Let's say you've only got a partial delivery in here. What you'll do is click on the delivery item and then we can come in and change the quantity received. So let's say we change that from 500 tons down to 150. And then under the assign part, we are going to change that to match our 150 against this Earthworks cost code. And so that ensures that that cost is properly allocated against your project budget. We're gonna click update Now. We can put in any notes for the accounts payable team to be able to refer to. And then when we click update, now we've created a docket within Varicon. So this is in complete status. And if it's in the incomplete status, then this will be visible to your admin team and they can complete it off. And so this is how we captured delivery dockets within Varicon.

In this video, I'm gonna show you how to approve time sheets within the Varicon mobile app. So we logged into our project and we're gonna open up the time sheet module. So you'll see in here that we've got four unapproved time sheets for DA today. Either we can go in and do a quick approve if we look at it and, and it all looks okay, or we can go in one by one and review the details and approve them. So we're gonna go through one and look at the details and approve it. And then the others we're gonna do with a quick approve. So let's open up this first time sheet in the submitted time. We can open that up to see the actual clock in and clock out time. And then the submitted clock in and clock out time. And then when we come down to the assigned time, if we disagree with this time, then we can come in, click on either the, any one of those fields and then change it. And then we're gonna come down and you're either gonna have a cost center or a task here, depending on your company setup for this, uh, employee and equipment. Time to hit your cost tracking. It needs to be assigned against a task or a cost center. So we're gonna choose here Earthworks for this, And then do the same for this equipment. Click assign and then assign it to Earthworks. We click update and continue. And so now, uh, now we've done everything we need to do for this time sheet. If there are any allowances, we would see them here, or we can add allowances, uh, if we want them to be put against this time sheet. And now we're gonna click on approve. So as you can see now, this time sheet has gone into approve status and for the other three we're going to bulk approve them. Now, one thing that's important here, we need to ensure that every time sheet is allocated against a cost center or a task so that it hits your project cost tracking. So let's choose these three time sheets here. And first what we're gonna do is we're gonna bulk assign these. So we're gonna click on the bulk assign button and then choose the cost center that these are all going against. So, so the limitation here is that you can only assign against one task or cost center if there's more than one task or cost center that they've worked on. You need to go into the individual time sheets. And now we're gonna choose these three again, And then click on the approve now button. And we're gonna assign this start and end time to each of them. Or we can just click on quick approve, which automatically puts 'em to approved status. So this is how we, uh, review and approve time sheets within the mobile app. This can also be done in a web browser from a computer.

In this video, I'm gonna show you through the site diary on the Varicon mobile app. The site diary can also be completed from a web browser on your computer. So we're in our project and we're gonna click on the site diary module. Your site diary might look quite different to this as each of these sections are highly customizable based on your company's specific needs. So some of these sections may be in a different order or not even visible for your company. So we're gonna go through section by section first for weather, it automatically picks up the weather based on your project location. And then you can put in any comments in the boxes below for sky temperature, rainfall, or wind. So for example, you might want to put whether the, the sky was clear or cloudy, whether it was from very hot to very cold, et cetera. If you have any weather delay, then you can check the box and that will note that in your site diary, and that can serve as important evidence in the case that you need to claim for weather delay in your progress claims. And then next, the note section will be different for every company as this is set up by your company's admin, uh, in your Varicon implementation phase. And so you'll come in each day and, and come in put, put your notes against these. And this information is gonna show up in your site diary. In the photo section, you can add photos to your, to your site diary each day by clicking add new, and either you can capture a photo that you already have in your photo library throughout the day, or you can click on the camera and then that'll bring up your camera and on the spot you can capture photos and add them into your site diary. And then the rest of the information is automatically filled out as you are completing timecards and dockets within the Varicon system. So in the tasks automatically when a timecard is completed or a docket is captured, it will show the cost center or task assigned to that based on how your company's cost tracking is set up. And if there's one that's missing here, then you can click add new to add that within the site diary. And then next, with timecards, your plant equipment and labor is automatically completed based on the timecards. So first we'll go into the timecard. This is exactly the same as in the timecard module. And there's a two-way data flow. So either you can approve your time sheets in the time sheets module, or you can come into the site diary and approve them in here. And then next we're gonna look at the labor section. So the difference between timecards and labor is that timecards refer to specific people, whereas labor refers to resources. So for example, whether a person is assigned as a supervisor, engineer, labor equipment officer, uh, equipment operator, et cetera, that's what's gonna show up in here. The suppliers tab in here shows the company that each worker is working for. So typically the majority of your workers are gonna be working for your company, but if you've got labor hire workers, then they are separated in here. And it makes it much easier for giving you a summary of all the hours that people for a labor hire company have worked. So that when the labor hire company puts in an invoice, you can reconcile against what's been approved on the job site. And then in resources, it'll show you for each resource type, how many hours have been worked on the project. And then next plant and equipment is automatically populated as people are doing their time sheets for equipment operators. But you may have some plant equipment that's not assigned to a specific person. And so in the site diary, you can come in and add new plant equipment. So for example, let's say we've got a dozer here and then toggle a sign to assign it against a task or a cost center. And then we'll choose the, the cost center, what was working on, how many hours it worked, and then add that to our site diary. And then next is dockets and materials. So again, the dockets here, this is exactly the same as the dockets module. Uh, and you can add dockets either through the site diary or through the dockets module. And then the materials are automatically filled out based on the dockets that you've captured last. Any costs that aren't labor equipment or materials can be added in the miscellaneous section. So you can come in here and add whatever costs have you've, uh, incurred against your project that aren't in labor equipment. Materials. And then the last thing to do for our day is to save our site diary. First, we're gonna see a summary of our site diary to check that it's all correct, and then check that we agree that, that it's all correct. Click on submit. And then as a supervisor, you are going to come sign off on your site. Diary, click, sign, and submit. And now this site diary has gone into submitted status. And then if you ever need to look back at previous site diaries, then you can click on the diary icon on the, the, the right side towards the, the top of the screen. And then you'll see that today's is completed. And then we've got previous days that, that are currently in draft mode. And so this is how you complete the site. Diary from the Varicon mobile app.

# Setting up Project in varicon

By its nature, the Varicon platform is based on projects.  In the early stage of your Varicon journey we will not be completing all the information in the project setup.

# Structure of projects within Varicon

## Explanation of Work Breakdown Structure and Cost Centres

Inside Varicon, costs are structured by “Tasks” and “Cost Centres” (also known as cost codes). These are the foundational building blocks for cost management. How you set these up depends on how you manage costs in your company.

### Tasks (Work Breakdown Structure)

The Tasks / WBS is typically the structure from your construction contract. This is the structure that you would use for making progress claims on Schedule of Rates and Lump Sum contracts. Some contractors track costs against the Work Breakdown Structure, but most track against cost centres. The reason for this is to make cost management easier for onsite personnel - while the contract may have dozens or hundreds of line items in the work breakdown structure, these can be condensed into between 1 to 20 cost centres.

Each new variation is then added as a new task on the Work Breakdown Structure.

The task structure can go 3 levels deep, looking like this:

- Task
  - Sub-task
    - Sub-task
      - Resource

Resources are always at the lowest level of task. Resources are the costs that you will occur in executing the project (eg, labour, equipment, materials, subcontractors).

Some contractors track costs against the work breakdown structure. The benefit of this is that costs are tracked against the same structure as your claims, making it easier to compare costs and revenues. The downside is that you can have a lot of tasks, particularly on a large job and that field personnel may not be familiar with this structure.

Often task-based tracking is done on projects where there is a dedicated project engineer, or other person onsite who is very familiar with this structure.

You can enable or disable tracking against Tasks in Settings > Other Settings > Daily Cost Tracking Settings

### Cost centres (Cost codes)

Cost centres are another way to track costs. Whereas there may be dozens or hundreds of tasks in the project, typically there will be a smaller number (5-20) cost centres that make sense to job supervisors.

In Varicon you can easily map each of your lowest level tasks to a cost centre when you are setting up the project. Day to day, onsite personnel only need to track against cost centres,

which can significantly simplify this task.  Tracking against cost centres is more common than tracking against tasks (WBS).
You can enable or disable tracking against Tasks in Settings > Other Settings > Daily Cost Tracking Settings

# Setting up a new project

You can set up a project from the “Projects” option on the left side bar.  If you do not see the “Add Project” button this most likely means that you do not have permission for creating new projects.

**Job Number, Job Name and description:** These can be any naming scheme that you wish.  If you are using MYOB AccountRight for your accounting, enter the Job ID from myob exactly as it appears in MYOB.
**Segment and sub-segment:** choose the business segment/s that the project is under.  Note, if the segment is missing you can add it under the “Settings” menu on the left side panel.
**Tracking Category (Xero only):** Tracking categories allow you to track costs against a project within Xero.  You need to set this up within Xero before it can be used (speak to your Varicon customer success specialist if you don’t know how).
If using tracking categories, enter here exactly as it appears in Xero.
**Status:** By default this is “Active”.  This is here so that once the project is completed you can change this status.
**Start and end dates:** Set based on your expected start and end dates.  Note, you cannot add costs before your start date or after your end date.  You may come back at any time to change these.
**Job address:** enter the job address.  This information is used for purchase orders and automated weather updates in site diary.
**Client details:** This field sets the client details for progress and variation claims.
In the “Client” filed you can select the organisation name for your client if they are set up in Varicon.  If they do not yet exist in Varicon, click on the orange “Add New Client” button.
Client lead contact: once you have chosen the organisation you can then select the Lead Contact.  This is the person who will be referenced on progress and variation claims.  If the person is not on the list go to side bar “User Management” > “Clients” to add them.
**Assigned to**

These are the “Users” assigned to the project (as opposed to “Employees” who are just doing timesheets”. Unless the employee has “Super Admin” status, they need to be included here for them to be able to see the Admin view through the Mobile App or to see the Project in their list in the web app.

You need to know the role of the person to be assigned, and enter this in the “Assignee Role” section. You can then select that person from the “Assignee” drop-down list.

**Payment Act:** choose the appropriate payment act for your state.

**Resource Cost Sheet:**

See section Creating resource cost sheets for more details.

Varicon allows you to assign resources to your project from a pre-populated list. This ensures that they are coded to the correct accounting codes in your accounting system.

We recommend that if possible you stick to one master resource cost sheet for the company, and that you select this one.

**Does the Project Require Contract Works Insurance?**

For now this does not connect to anything throughout the platform.

**Estimation Sheet Upload**

In this field you will upload your budget estimate template. This will be custom coded for you, and will convert your template into the correct format for Varicon. Your upload will not work until this is completed.

Alternatively you may click on “I want to add task/subtask/resource manually” and the project will be generated without any tasks/subtasks/resources.

## Creating project budget if not importing template

This section is only required if you have not imported a budget file.

To add a new task:

- Click on the “Add Task” Buttom

- Give a description for the task in the field “Enter A Task Name..”
- In WBS Enter the task number
- If the task is to appear in your progress claim, put a “Claim Ref” in. Often this will be the same as the task number.
- The task is completed under the Cost and Contract tabs
- Under the “Cost” tab you can either add a sub-task or a resource. If you choose a sub-task you can then put a sub-subtask or a resource under it. Under sub-subtask you can only place a resource.

## Mapping tasks to cost centres

If you track your costs using cost centres, you will need to map each task to a cost centre.  This can be done prior to importing your budget with a few modifications to your budget structure, or it can be done within Varicon after importing the budget.

## Mapping tasks to cost centres prior to importing into Varicon

With a few changes to your budget template (either Excel estimating template or export from an accounting software), you can assign cost centre to each task before importing into Varicon.
The cost centres in the import template need to match your cost centres in Varicon (go to Settings > Cost Centre).
Your Varicon customer success specialist will assist you with this process.
Steps:

1. In your budget template, create a column alongside each task to add cost centres
2. Export your cost centre list
3. Copy the sheet into your budget template and use data validation to create a drop-down list in the cost centre column in your budget template

## Mapping tasks to cost centres after importing into Varicon

If cost centres are not completed in your import template they will be assigned to your default cost centre.  You can then assign within Varicon.

1. Open up the “Forecast” tab in your project
2. Click on the edit icon next to WBS ID item
3. Choose the appropriate cost centre.  You can select from drop-down list or type in the name of the cost centre.