

# SyncMaster

## User Manual

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# 1 Getting Started

The admin portal for SyncMaster is accessed [here](#). This link allows you to sign in to the admin portal if your account is already configured, or to get started on creating your account. See [2 Account Setup](#) if this is your first time using the application. Otherwise, proceed to [3 Contractor Portal](#).

## 2 Account Setup


### 2.1 Requesting an Account

To use the SyncMaster application, you require an account. There are three types of accounts:

1. Admin: The strongest user and has access to all features of the application.
2. Employee: Has access to the contractor portal and can view and download documents from the admin portal.
3. Contractor: Can access the contractor portal but has no access to the admin portal.

To request an account, first access the admin portal for the SyncMaster application as specified in [1 Getting Started](#).

Click on the *Request Account* option



Hamilton

**Hamilton Water**

Sign In

Email

Please enter a valid email address

Password

SIGN IN

[Request Account](#)

[Reset Password](#)

Enter in your information into each of the fields, then select the desired user role.



Hamilton

## Hamilton Water

### Request Account

Role Requested \*

Contractor ▼

REQUEST ACCOUNT

[Back to Sign In](#)

You should see the following screen confirming your account request.



Hamilton

## Hamilton Water

### Account Request Received

Your submission has been received and is pending review by our team.

The account must be approved by an admin user in the admin portal.

## 2.2 Password Reset

Once your account request is approved, you will receive an email with a temporary password. Return to the sign in screen and enter your email and temporary password. You will be prompted to change your password as seen below:

### Hamilton Water

#### Reset Password

New Password

Confirm New Password

RESET PASSWORD

[Back to Sign In](#)

Your new password needs to meet the following criteria:

1. At least 8 characters long.
2. At least 1 numeric character.
3. At least 1 uppercase character.
4. At least 1 special character.

You are now able to access your account with your new password.

## 3 Contractor Portal

To access a contractor portal, when you arrive at a site scan the site QR code to access the portal. Sign into the account you created in section 1. You will be prompted with the acknowledgement screen similar to the one below. Read and acknowledge the documentation and identify your completion of the Annual H&S Training.

### Acknowledgment

The following document(s) must be read  
before accessing the site.

#### Asbestos Survey.docx

Link: [Click Here to View Document](#)

☐ I acknowledge that I have read this  
document

#### HCS04 - General Hazard ...

Link: [Click Here to View Document](#)

☐ I acknowledge that I have read this  
document

#### HW PO Health and Safet...

Link: [Click Here to View Document](#)

☐ I acknowledge that I have read this  
document

#### PO Master Designated S...

Link: [Click Here to View Document](#)

☐ I acknowledge that I have read this  
document

The following training(s) must be completed  
before accessing the site.

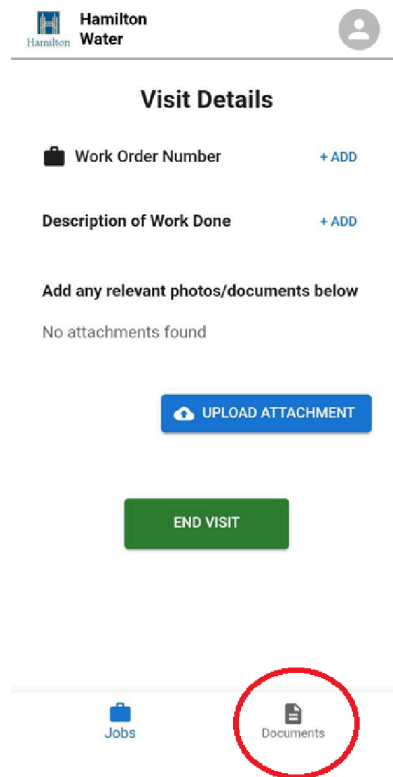
Have you completed the Annual H&S Training?

☐ Yes

☐ No


You will now land on the visit details page, where you can enter a work order number, a description of the work you will do at the site, and upload any photos via the *Upload Attachment* button.


You can view all site documentation for the site you are at by clicking on the *Documents* button on the bottom right, circled red on the below image.



Hamilton Water

### Visit Details

 Work Order Number [+ ADD](#)

 Description of Work Done [+ ADD](#)

Add any relevant photos/documents below

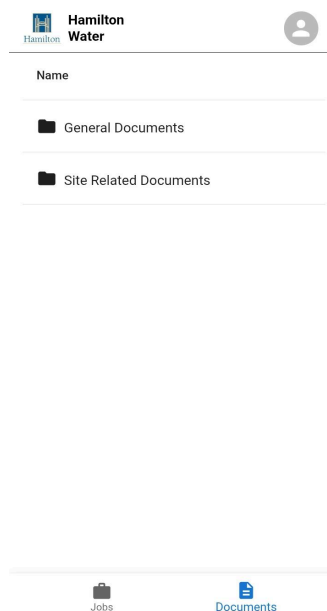
No attachments found

[UPLOAD ATTACHMENT](#)



[END VISIT](#)

[Jobs](#) [Documents](#)

This will display a page similar to the following, which is a collection of files and folders with station information.



Hamilton Water

Name
 General Documents
 Site Related Documents

[Jobs](#) [Documents](#)

When you have finished your visit at the site, click on the *End Visit* button on the Visit Details page to exit the application. It is circled red below.

Hamilton Water

### Visit Details

**Work Order Number** 43455

**Description of Work Done**

Came to site and replaced the broken doorknob. Works correctly now, see attached photo.

**Add any relevant photos/documents below**

Uploaded Files

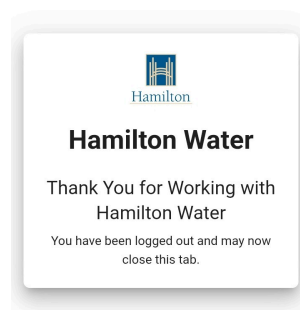
[c7665ce5-1d42-44d3-8ec6-7a9de98dd0e5.jpg](#)

**UPLOAD ATTACHMENT**

**END VISIT**

Jobs Documents

If you are successful, you will see this screen:





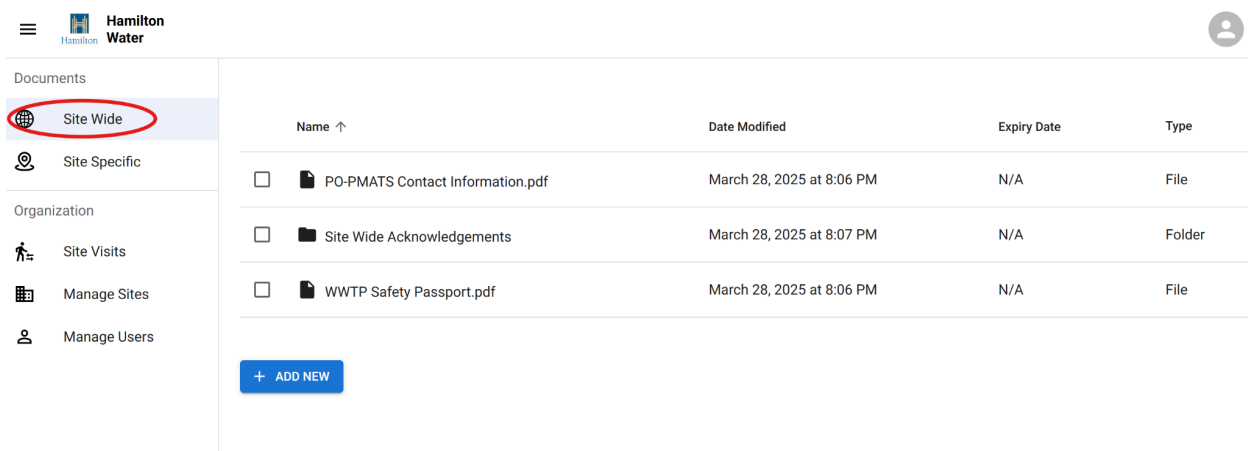
## 4 Admin Portal

This section describes how to use the features for admin users. If you are a contractor user, you can not access any items in this section. If you are an employee user, sections 4.1, 4.2, and 4.3 apply to you, but you will not be able to upload or delete documents. You will only be able to view and download documents as described in these sections.

### 4.1 Adding Site Wide Documents

There are two types of documents, site wide documents and site specific documents. Site wide documents will appear in the contractor portal of every single site. Site specific documents will only appear in the contractor portal of a single site of your choosing.

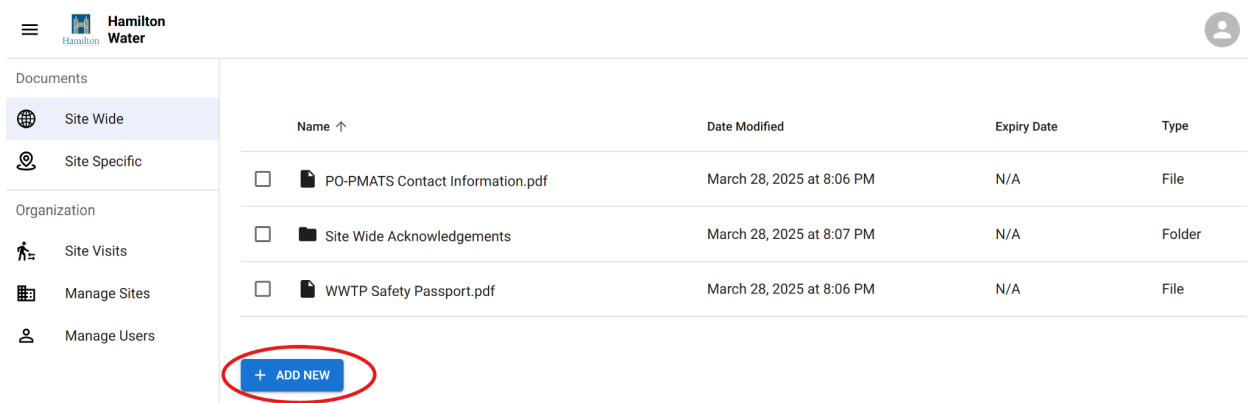
To add site wide documents click on the button circled red below.



The screenshot shows the Hamilton Water Admin Portal. On the left sidebar, under the 'Documents' section, the 'Site Wide' option is highlighted with a red circle. The main content area displays a table of documents. Below the table is a blue button labeled '+ ADD NEW'.

	Name ↑	Date Modified	Expiry Date	Type
<input type="checkbox"/>	PO-PMATS Contact Information.pdf	March 28, 2025 at 8:06 PM	N/A	File
<input type="checkbox"/>	Site Wide Acknowledgements	March 28, 2025 at 8:07 PM	N/A	Folder
<input type="checkbox"/>	WWTP Safety Passport.pdf	March 28, 2025 at 8:06 PM	N/A	File

You can now add documents (either files or folders) that you wish to display in all contractor portals using the **+Add New** button circled red below.



This screenshot is identical to the previous one, but the blue button labeled '+ ADD NEW' at the bottom of the document list is circled in red.

Select either *Add File* or *Add Folder* depending on whichever is applicable to you.

Hamilton Water

Documents

Site Wide

Site Specific

Organization

Site Visits

Manage Sites

Manage Users

Name ↑	Date Modified	Expiry Date	Type
<input type="checkbox"/> PO-PMATS Contact Information.pdf	March 28, 2025 at 8:06 PM	N/A	File
<input type="checkbox"/> Site Wide Acknowledgements	March 28, 2025 at 8:07 PM	N/A	Folder
<input type="checkbox"/> WWTP Safety Passport.pdf	March 28, 2025 at 8:06 PM	N/A	File

+ ADD NEW

Add File

Add Folder

You will now be prompted to optionally add an expiry date or specify if the document requires acknowledgements.

If you set an expiry date, the expiry date column will populate with a date so you know when a new version of the document needs to be uploaded. the colour of the date identifies the urgency in which to replace the documents. Documents which are expired are red, while documents close to expiry are yellow as outlined in the image below:

Name ↑	Date Modified	Expiry Date	Type
<input type="checkbox"/> IMG_3037.jpeg	April 3, 2025 at 6:26 PM	April 4, 2025 at 12:00 AM	File
<input type="checkbox"/> mce-main-logo.svg	April 3, 2025 at 6:27 PM	April 3, 2025 at 12:00 AM	File
<input type="checkbox"/> PO-PMATS Contact Information.pdf	March 28, 2025 at 8:06 PM	N/A	File
<input type="checkbox"/> Site Wide Acknowledgements	March 28, 2025 at 8:07 PM	N/A	Folder
<input type="checkbox"/> WWTP Safety Passport.pdf	March 28, 2025 at 8:06 PM	N/A	File

+ ADD NEW

If you say yes to requiring an acknowledgement, this will appear in the acknowledgement screen outlined in [3 Contractor Portal](#).

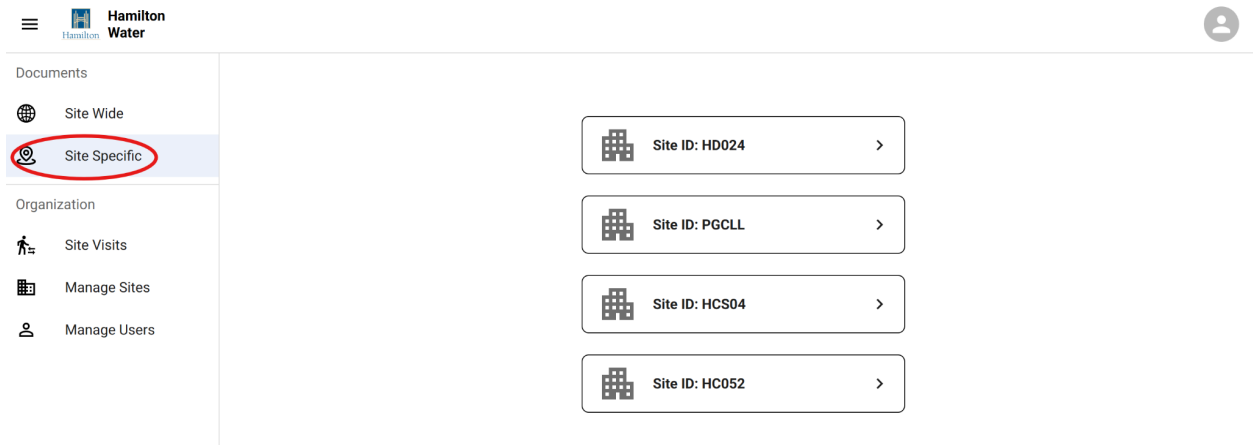
When you are satisfied with your choices, click the *Upload* button as seen in the below image.

The screenshot shows the Hamilton Water Contractor Portal interface. On the left is a sidebar with navigation links: Documents (Site Wide, Site Specific), Organization (Site Visits, Manage Sites, Manage Users), and a '+ ADD NEW' button. The main area displays a table of documents. A modal dialog titled 'Confirm Upload' is open, showing the file name 'expo (2).pdf' and an 'Expiry Date' field with a placeholder 'yyyy-mm-dd'. Below the field is a note: 'Note: Leave blank if no expiry date is required'. The dialog asks 'Does this document require acknowledgment?' with radio buttons for 'Yes' and 'No' (selected). At the bottom are 'CANCEL' and 'UPLOAD' buttons.

	Name ↑	Date Modified	Expiry Date	Type
<input type="checkbox"/>	PO-PMATS Contact Information.pdf	March 28, 2025 at 8:06 PM	N/A	File
<input type="checkbox"/>	Site Wide Acknow	07 PM	N/A	Folder
<input type="checkbox"/>	WWTP Safety Pas	06 PM	N/A	File

## 4.2 Adding Site Specific Documents

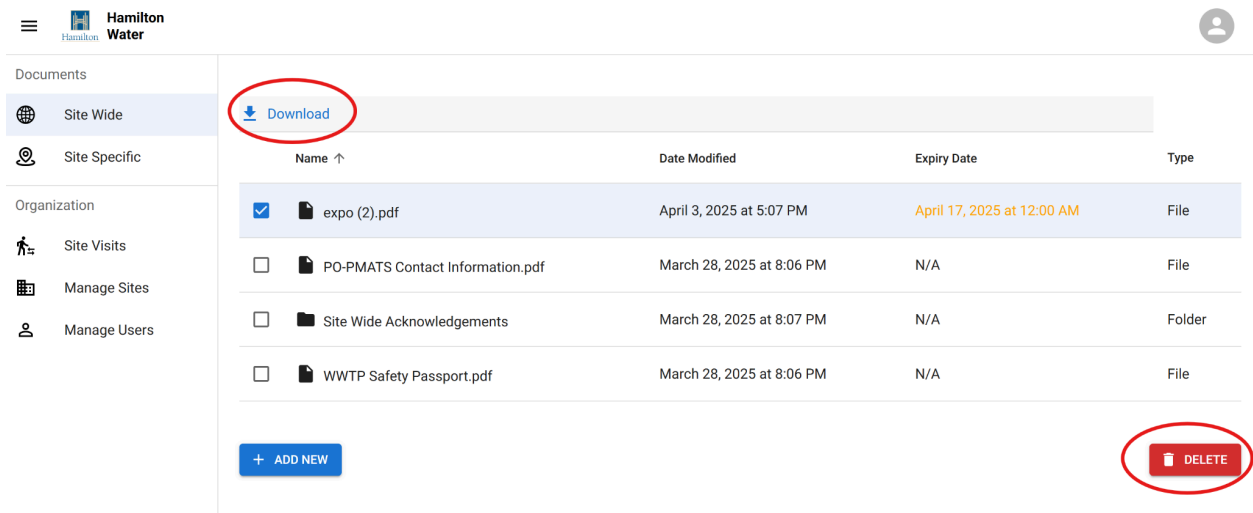
To add a site specific document, first click on the button circled red below.



Now, select the site in which you wish to add a document to from the list of sites that are displayed. Once you have selected a site, the process of adding a document is identical to that of section [4.1 Adding Site Wide Documents](#).

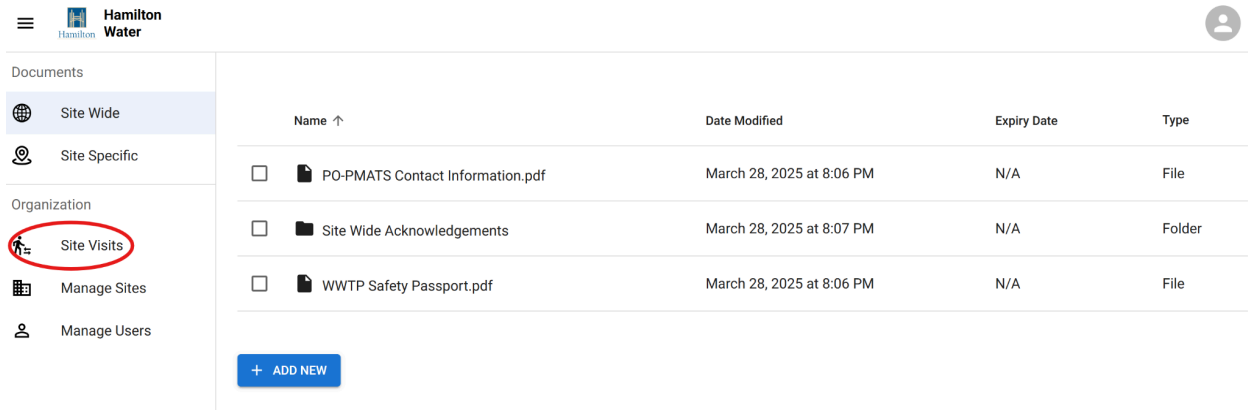
## 4.3 Downloading and Deleting Documents

To download or delete either a site wide or site specific document, click on the file and both of these options are available to you, circled red in the image below.



## 4.4 Viewing Site Visit Logs

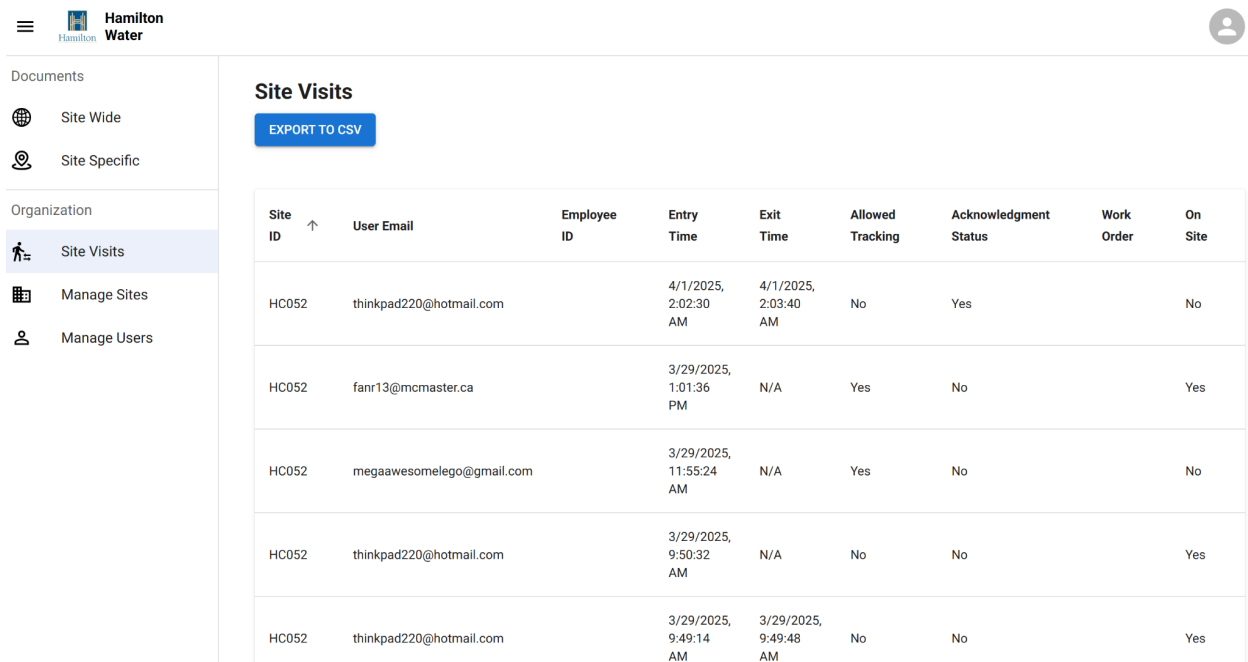
To view site visit logs, click the *Site Visits* button circled red below.



The screenshot shows the Hamilton Water application interface. On the left, there is a sidebar with a 'Documents' section containing 'Site Wide' and 'Site Specific' options, and an 'Organization' section containing 'Site Visits' (circled in red), 'Manage Sites', and 'Manage Users'. The main content area displays a table with columns: Name, Date Modified, Expiry Date, and Type. The table contains three entries: 'PO-PMATS Contact Information.pdf', 'Site Wide Acknowledgements', and 'WWTP Safety Passport.pdf'. A blue '+ ADD NEW' button is located at the bottom of the table.

Name	Date Modified	Expiry Date	Type
<input type="checkbox"/> PO-PMATS Contact Information.pdf	March 28, 2025 at 8:06 PM	N/A	File
<input type="checkbox"/> Site Wide Acknowledgements	March 28, 2025 at 8:07 PM	N/A	Folder
<input type="checkbox"/> WWTP Safety Passport.pdf	March 28, 2025 at 8:06 PM	N/A	File

You should now see a screen similar to the one below.



The screenshot shows the Hamilton Water application interface with the 'Site Visits' page selected. The left sidebar is the same as in the previous screenshot. The main content area has a 'Site Visits' header with an 'EXPORT TO CSV' button. Below the header is a table with columns: Site ID, User Email, Employee ID, Entry Time, Exit Time, Allowed Tracking, Acknowledgment Status, Work Order, and On Site. The table contains five entries of site visits.

Site ID	User Email	Employee ID	Entry Time	Exit Time	Allowed Tracking	Acknowledgment Status	Work Order	On Site
HC052	thinkpad220@hotmail.com		4/1/2025, 2:02:30 AM	4/1/2025, 2:03:40 AM	No	Yes		No
HC052	fanr13@mcmaster.ca		3/29/2025, 1:01:36 PM	N/A	Yes	No		Yes
HC052	megaawesomelego@gmail.com		3/29/2025, 11:55:24 AM	N/A	Yes	No		No
HC052	thinkpad220@hotmail.com		3/29/2025, 9:50:32 AM	N/A	No	No		Yes
HC052	thinkpad220@hotmail.com		3/29/2025, 9:49:14 AM	3/29/2025, 9:49:48 AM	No	No		Yes

There are 9 columns in the side visit logs, the information described is:

- Site ID: The unique ID of a Hamilton Water site which identifies it.
- User Email: The email of the user account that visited the site
- Employee ID: The employee ID of the employee accompanying them, if applicable
- Entry Time: The time the user signed into a station portal.
- Exit Time: The time the user signed out of a station portal.
- Allowed Tracking: Whether the user gave SyncMaster permission to view their GPS coordinates.

- Acknowledgement Status: Yes if the user acknowledged all the station documents, No if they did not.
- Work Order: The work order number, if it is provided.
- On Site: Yes if the user allowed tracking and was within the acceptable radius of the station, No otherwise.

The logs can be exported to a csv file by clicking the *Export to CSV* button circled red below. The csv file is downloaded and the user can perform data manipulation and extract the desired information.

Documents

- Site Wide
- Site Specific

Organization

- Site Visits
- Manage Sites
- Manage Users

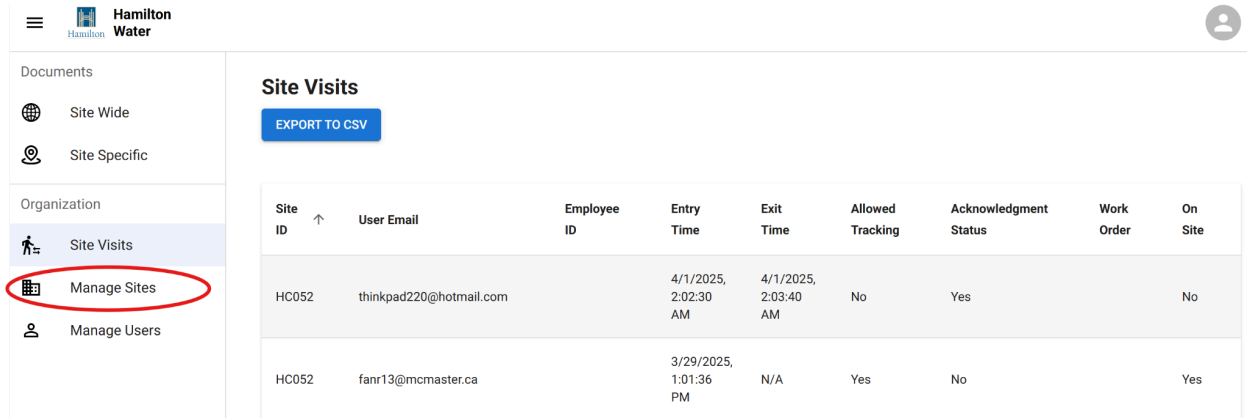
### Site Visits

EXPORT TO CSV

Site ID	User Email	Employee ID	Entry Time	Exit Time	Allowed Tracking	Acknowledgment Status	Work Order	On Site
HC052	thinkpad220@hotmail.com		4/1/2025, 2:02:30 AM	4/1/2025, 2:03:40 AM	No	Yes		No
HC052	fanr13@mcmaster.ca		3/29/2025, 1:01:36 PM	N/A	Yes	No		Yes
HC052	megaawesomelego@gmail.com		3/29/2025, 11:55:24 AM	N/A	Yes	No		No
HC052	thinkpad220@hotmail.com		3/29/2025, 9:50:32 AM	N/A	No	No		Yes
HC052	thinkpad220@hotmail.com		3/29/2025, 9:49:14 AM	3/29/2025, 9:49:48 AM	No	No		Yes

## 4.5 Manage Sites

To edit existing site information or add a new site, click on the *Manage Sites* button circled red in the image below.



**Hamilton Water**

Documents

- Site Wide
- Site Specific

Organization

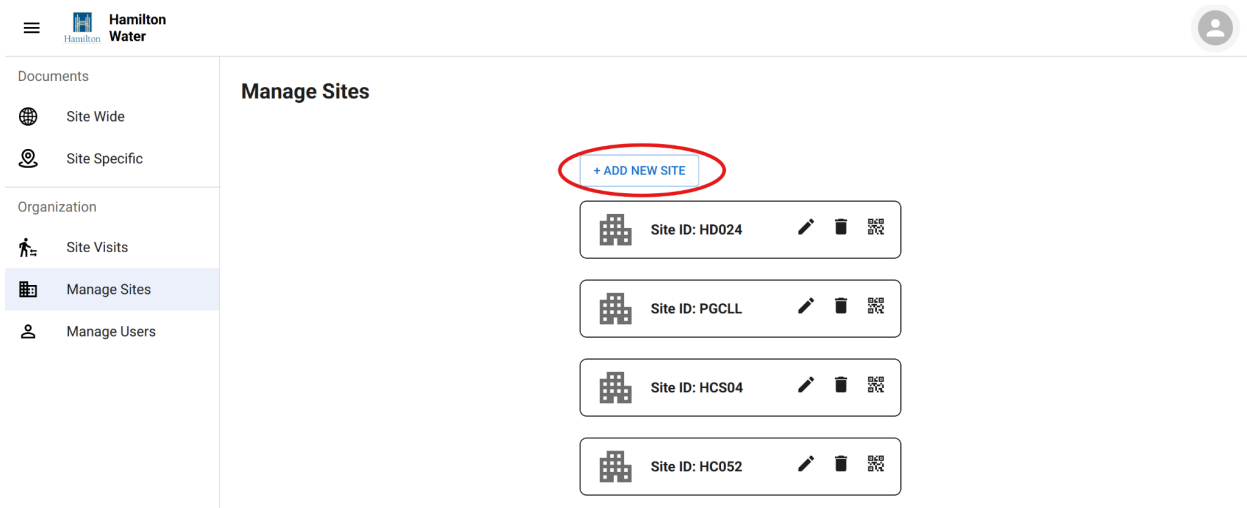
- Site Visits
- Manage Sites**
- Manage Users

### Site Visits

EXPORT TO CSV

Site ID	User Email	Employee ID	Entry Time	Exit Time	Allowed Tracking	Acknowledgment Status	Work Order	On Site
HC052	thinkpad220@hotmail.com		4/1/2025, 2:02:30 AM	4/1/2025, 2:03:40 AM	No	Yes		No
HC052	fanr13@mcmaster.ca		3/29/2025, 1:01:36 PM	N/A	Yes	No		Yes

You should see a screen similar to the one below. To add a new site, click on the *Add New Site* button circled red below:



**Hamilton Water**

Documents

- Site Wide
- Site Specific

Organization

- Site Visits
- Manage Sites**
- Manage Users

### Manage Sites

**+ ADD NEW SITE**

- Site ID: HD024
- Site ID: PGCLL
- Site ID: HCS04
- Site ID: HC052

You will see the screen below appear, with the fields to enter a site ID, latitude, longitude, and an acceptable range for gps tracking.

**Important: ensure you enter the correct site ID, as it can not be changed later.**

The screenshot shows the 'Manage Sites' interface with a modal titled 'Add New Site'. The modal contains four input fields: 'Site ID', 'Latitude' (with a sub-label 'degrees (°)'), 'Longitude' (with a sub-label 'degrees (°)'), and 'Acceptable Range' (with a sub-label 'meters (m)'). At the bottom right of the modal are two buttons: 'CANCEL' and 'CREATE'.

Click the *Create* button, and your site will now appear in the list of sites.

There are 3 buttons you can press, circled red in the image below. These are *edit site*, *delete site*, and *view site QR code*.

The screenshot shows the 'Manage Sites' interface with a list of sites. The first site is 'Site ID: HD024'. To the right of the site ID are three icons: a pencil (edit), a trash can (delete), and a QR code (view site QR code). These three icons are circled in red. Above the icons are labels: 'Edit site details' above the pencil, 'Delete site' above the trash can, and 'View site QR code' above the QR code. A red arrow points from each label to its corresponding icon. There is also a '+ ADD NEW SITE' button at the top left of the list.

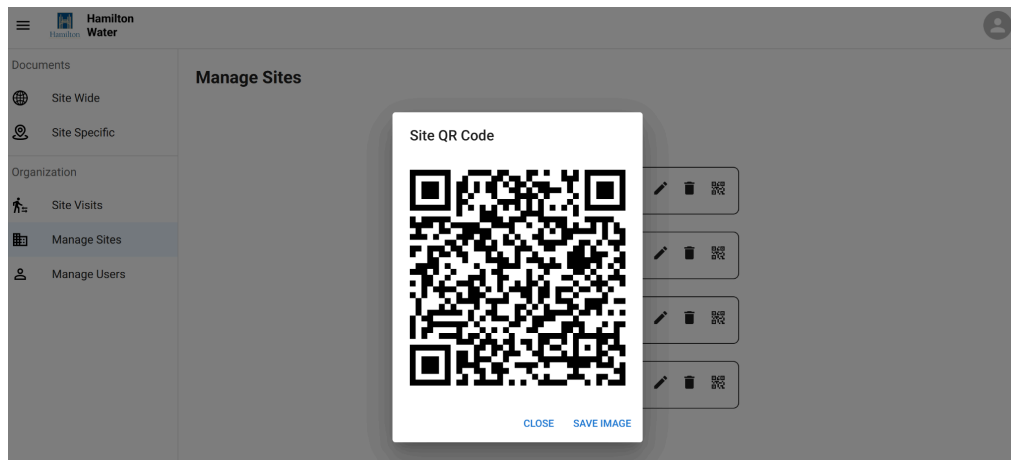
Site ID	Edit site details	Delete site	View site QR code
Site ID: HD024			
Site ID: PGCLL			
Site ID: HCS04			
Site ID: HC052			



Clicking on the *edit site* option noted above brings you to a screen to edit the longitude, latitude, and the acceptable range.

Clicking on the *delete site* option noted above prompts you to confirm your deletion and will remove the site if you proceed.

Clicking on the *view site QR code* option noted above displays a screen similar to the following:



From here, you have the option to save the image to your computer. This QR code is what users scans to access this stations contractor portal.

## 4.6 Manage Users

To manage existing user accounts, click on the *Manage Users* button circled red below.

Name	Email	Role	Company	Status	Actions
Bob Lee	testing@loading.com	contractor	ABC Contracting	Requires Password Change	
Jack Nickolson	thinkpad220@hotmail.com	contractor	Millers Plumbing	Confirmed	
test request	raf.eediqbal@gmail.com	contractor	test request	Confirmed	
Sam Lee	megaawesomeleo@gmail.com	contractor	Sam's Plumbing	Confirmed	
Jack Smith	rafeediqbal@gmail.com	contractor	Test Contracting Company	Confirmed	
Dani	daniel.saagaleano@hamilton.ca	contractor	Hamilton	Requires Password Change	

The list of users has the following attributes:

- Name: The name of the user.
- Email: The email of the user.
- Role: The role of the user (contractor, employee, admin).
- Company: The company the contractor works for.
- Status: *Confirmed* if the account is fully configured, *Requires Password Change* if the user has not updated their password from the initial password provided by the system.

To edit the details of an existing user, click on the pencil icon beside a specific user. You should see a box similar to the image below appear. You are able to edit a users name, company, and role.

Name	Email	Role	Company	Status	Actions
Bob Lee	testing@loading.com	contractor	ABC Contracting	Requires Password Change	
Jack Nickolson	thinkpad220@hotmail.com	contractor	Millers Plumbing	Confirmed	
test request	raf.eediqbal@gmail.com	contractor	test request	Confirmed	
Sam Lee	megaawesomeleo@gmail.com	contractor	Sam's Plumbing	Confirmed	
Jack Smith	rafeediqbal@gmail.com	contractor	Test Contracting Company	Confirmed	
Dani	daniel.saagaleano@hamilton.ca	contractor	Hamilton	Requires Password Change	

You can also add a brand new user by clicking on the *Add New User* button circled red in the image below.

**Manage Users**

**+ ADD NEW USER** **USER REQUESTS**

Name	Email	Role	Company	Status	Actions
Bob Lee	testing@loading.com	contractor	ABC Contracting	Requires Password Change	
Jack Nickolson	thinkpad220@hotmail.com	contractor	Millers Plumbing	Confirmed	
test request	raf.eediqbal@gmail.com	contractor	test request	Confirmed	

This will prompt you to the screen below, where you enter in the users name, email, company name, and desired account role. Instructions to access their account is then sent to their email as outlined in [2.2 Password Reset](#).

**Add New User**

Please enter the following details about the new user

Name

Email

Company Name

User Role

**+ ADD NEW USER**

You can view outstanding account requests by clicking on the *User Requests* button circled red in the image below.

The screenshot shows the 'Manage Users' interface. On the left sidebar, under 'Organization', 'Manage Users' is selected. The main content area is titled 'Manage Users' and contains two buttons: '+ ADD NEW USER' and 'USER REQUESTS'. The 'USER REQUESTS' button is circled in red. Below the buttons is a table with the following data:

Name	Email	Role	Company	Status	Actions
Bob Lee	testing@loading.com	contractor	ABC Contracting	Requires Password Change	
Jack Nickolson	thinkpad220@hotmail.com	contractor	Millers Plumbing	Confirmed	
test request	raf.eediqbal@gmail.com	contractor	test request	Confirmed	

You should then see a screen similar to the image below. Account requests can either be accepted by clicking on the *Approve* button or rejected by clicking on the *Reject* button.

The screenshot shows the 'User Requests' interface. On the left sidebar, under 'Organization', 'Manage Users' is selected. The main content area is titled 'User Requests' and contains a table with the following data:

Name	Email	Company	Role Requested	Actions
Rafeed Iqbalffff	iqbalr8fff@mcmaster.ca	ffff	contractor	<button>APPROVE</button> <button>REJECT</button>