

Field Tickets

Frequently Asked Questions

When should I contact the Husky procurement technician (purchase order owner)?

- If the field ticket has not been actioned for a long time and you are waiting to invoice.
- If the purchase order (PO) from Husky is early coded (work order number/cost centre/authorization for expenditure (AFE) field is already filled in) and a different cost object was provided by the field approver. Only Husky can make changes to the cost codes.
- If a mistake was made on a field ticket, contact the procurement technician on the PO to take the necessary steps so the ticket can be processed.
- To have a closed PO reopened.
- To have the validity dates on the PO changed.
- To have a contract added or changed on the PO.
- If you have any other questions about the PO.

How do I begin creating the field ticket?

1. Update the field ticket number and service date.
2. Enter the reporting period start and end dates. If the service dates are outside the PO validity date range, contact the Husky procurement technician. For POs with validity dates, the *Ticket Date*, *Start Date*, *End Date*, *Service Period Start Date* and *Service Period End Date* must fall within the validity date range of the PO.

Note: Doing these steps eliminates PO validity date errors.

Field Ticket	
Ticket Details	
Ticket No	HL99557381
Ticket Date	03/02/2018
Reporting Period	
Start Date	03/02/2018
End Date	03/02/2018
Service Period Start Date	Service Period End Date
03/02/2018	03/02/2018

3. Click the *Reference Document* **button** to reference the PO.

How do I ensure all field ticket dates are correct?

1. Enter the field ticket number in the **Ticket Details** section.
2. The *Ticket Date* defaults to the service dates at the line-item level.
3. Enter the *Start Date* and *End Date* in the **Reporting Period** section. These dates must reflect when the services were performed.

Note: Ensure all dates are within the validity dates on the PO.

Field Ticket			
Reporting Period		Ticket Details	
Start Date	<input type="text" value="03/02/2018"/>	Ticket No	<input type="text" value="HL99557381"/>
End Date	<input type="text" value="03/02/2018"/>	Ticket Date	<input type="text" value="03/02/2018"/>

4. Confirm the *Service Period Start* and *End Dates* on the line items reflect the dates when the work was completed. The dates are defaulted from the field ticket date.

Note: Select the **REPEAT** checkbox to populate the *Service Period Start* and *End Dates* on subsequent line items.

Tax Exempt Code	Tax Amount	Service Period Start Date	Service Period End Date	Cost Object Type
Taxable	\$1.00	<input type="text" value="12/01/2017"/>	<input type="text" value="12/14/2017"/>	
Taxable	\$0.00			

Dec 2017

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

REPEAT
Existing line items below and all new line items will use this date.

GST/HST	\$20.00
PST	\$1.00
Total Tax	\$0.00
Total	\$1.00
	\$21.00

**What information do I need to enter in the field ticket in Cortex Workbench?
What backup is required?**

1. Fill out the yellow required fields as well as the conditional fields. These fields will remain white but are still required.

- 2. Attach the applicable backup in PDF format. This can be a field ticket or invoice if you do not have field tickets.

Note: Use the *Walk-Me Through* feature. This feature can be activated from the *Cortex Help Widget* on the bottom right of your Workbench account.

What is the difference between the Approver Code and Field Approver fields?

- The **Field Approver** field contains a list of field approver emails from a drop-down box. Click the *magnifying glass* on the right-hand side of the **Field Ticket Shipment** tab to select the email address if the field ticket is being sent to the field approver for approval.

Note: If a field approver's email address is on the stamp, send the field ticket to that approver. If there is no field approver email address in the drop down, the ticket will flow through to the business unit approver. In this case, only the approver code field will be filled in.

A screenshot of a form with two input fields. The top field is labeled "Field Approver" and is empty. The bottom field is labeled "Approver Code" and contains the text "2Z-2010133".

A screenshot of a "Select Approver" dialog box. It contains search filters for First Name, Last Name, Email, Job Title, Business Unit, and Phone. Below the filters is a table with columns for Name, Phone, Job Title, and Business Unit. The first row is highlighted in blue and has a red box around it. The "Close" button at the bottom right is also highlighted with a red box.

Name	Phone	Job Title	Business Unit
Julian Whittore			
Adrian Pallas			
Andrew Kane			
Andrew Mudgett			
Andy Ip			
Arnold Muller			

- The **Approver Code** field contains the approver number that references the Husky employee on the field ticket. Enter the approver code exactly as provided to you by Husky. These will start with 2Z, 66Z, etc.

How do I know if the coding provided is an authorization for expenditure, work order number, network or cost centre?

- The attached field ticket indicates if the code is an authorization for expenditure (AFE), work order (WO), cost centre (CC) or network. These are called cost objects.
- Enter the cost object number in the **Value** field in the **Cost Object Details** section.
Note: If the number is entered incorrectly, the field ticket will be rejected. Contact the field ticket approver or Husky procurement technician if you are unsure of the number.

Why is the field ticket rejected due to a duplicate ticket number?

- The field ticket number is already in use on another field ticket.
- The field ticket number is in use on a different PO.
Note: Use a unique supplier-created ticket number for every field ticket. Do not add a letter after the field ticket number on rejected field tickets to push them through the system faster.

The work order number is not open for posting. How do I open it?

- Contact the field approver on the field ticket or the procurement technician on the PO to open it.

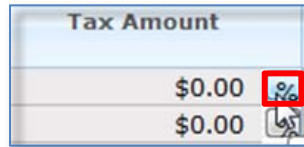
How many purchase order lines can I reference on the field ticket?

- A separate field ticket must be created for each unique PO line.
- The field ticket can have multiple lines, all referencing the same PO line.

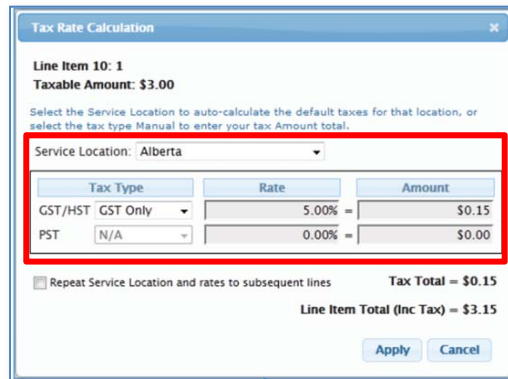
The purchase order has the wrong tax type. How can I get this corrected?

- First confirm the PO is the correct one.
- If the provincial taxes on the PO are incorrect, notify the procurement technician listed on the PO to have it reissued with the correct service location and tax.
- If the provincial tax displayed on the PO is correct, change the provincial taxes on the field ticket to the correct service location.

- To change the provincial taxes:
 - Click the % icon in the **Tax Amount** column.



- The **Tax Rate Calculation** screen displays.



- In the **Service Location** field, click the drop-down arrow to select the correct province or in the **PST** field, click the drop-down arrow to select the correct provincial tax. E.g., Exempt.

How can I find out why my field ticket was rejected?

- Double click the rejected field ticket on the *Document List* to open it in full screen view. Scroll down to the **Comments** field to view why the ticket was rejected. The rejection can have a system-generated message. This means the submission could not be validated by Husky. A ticket can be manually rejected by a Husky approver and comments entered by the business unit approver or the procurement technician.

Can I enter the details in the short-text field to provide additional details for a non-rate validated contract line item?

- Yes, always change the short-text description in a non-rate validated PO.

How can I ensure information on the field ticket is correct before submitting it?

- Check that all required fields are correctly filled in.

Note: The Cortex Workbench account allows you to validate the format requirements set by Husky, not the accuracy of the content.

What statuses will the field ticket have when submitted in Cortex Workbench?

- The field ticket will first display with a *New* status.
 1. Once Husky has received the field ticket, the status will change to *Received*. If it goes to a Husky field approver, the status will change to *Approver Received*.
 2. The field approver will give it either *Stage 1 Approved* or *Rejected* status.
 3. Once approved by the field approver, the status changes to *InReview* while being reviewed by the Husky staging table. This also applies to non-field approver tickets.
 4. The field ticket will then be *Approved* or *Rejected*.

Rounding scenario

- If the line item has a unit cost that is entered with three decimal places (0.000) for a single unit, Cortex Workbench will automatically round the amount to two decimal places (0.00). This will cause a discrepancy in the dollar amount of the line item.
- To force the unit cost to display as the correct amount, enter the price for a quantity of 10. For example:
 - Multiply the actual unit cost by 10 to shift the decimal place. E.g., if the unit cost is \$0.187, multiply by 10 to make it \$1.87.
 - Enter this amount in the **Unit Cost** field.
 - Enter 10 in the **Price Per** field.

Examples	Qty	UoM	Unit Cost	Price Per	Total
1	50	each	\$ 0.187	1	\$ 9.35
2	50	each	\$ 0.19	1	\$ 9.50
3	50	each	\$ 1.87	10	\$ 9.35