



Idea Elan

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2018

ANU Technician

How to Close a Job

Comprehensive Online Solution for
Lab and Core Facility Management

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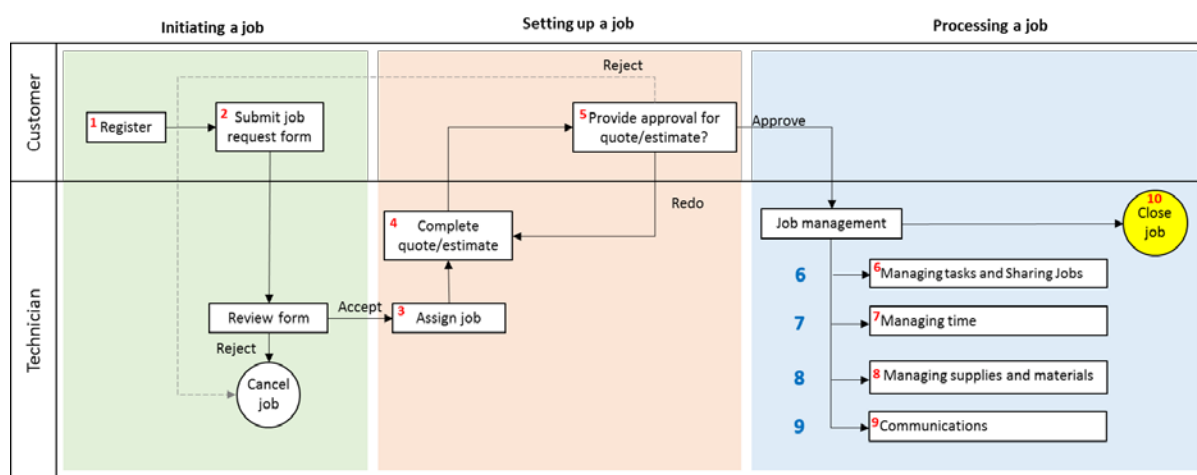
Email: support@IdeaElan.com

How to Close, Re-open or Cancel a Job

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how to close a job once it is completed in the Technical Workshops Work Management System as well as how to re-open or cancel a job. We have produced a series of 'how-to guides' that can be accessed from the System webpage, which can be found here: <https://services.anu.edu.au/information-technology/software-systems/technical-workshop-work-management-system>

Please see the workflow chart below for more information on the system workflow and the associated 'how-to guide' for each step.



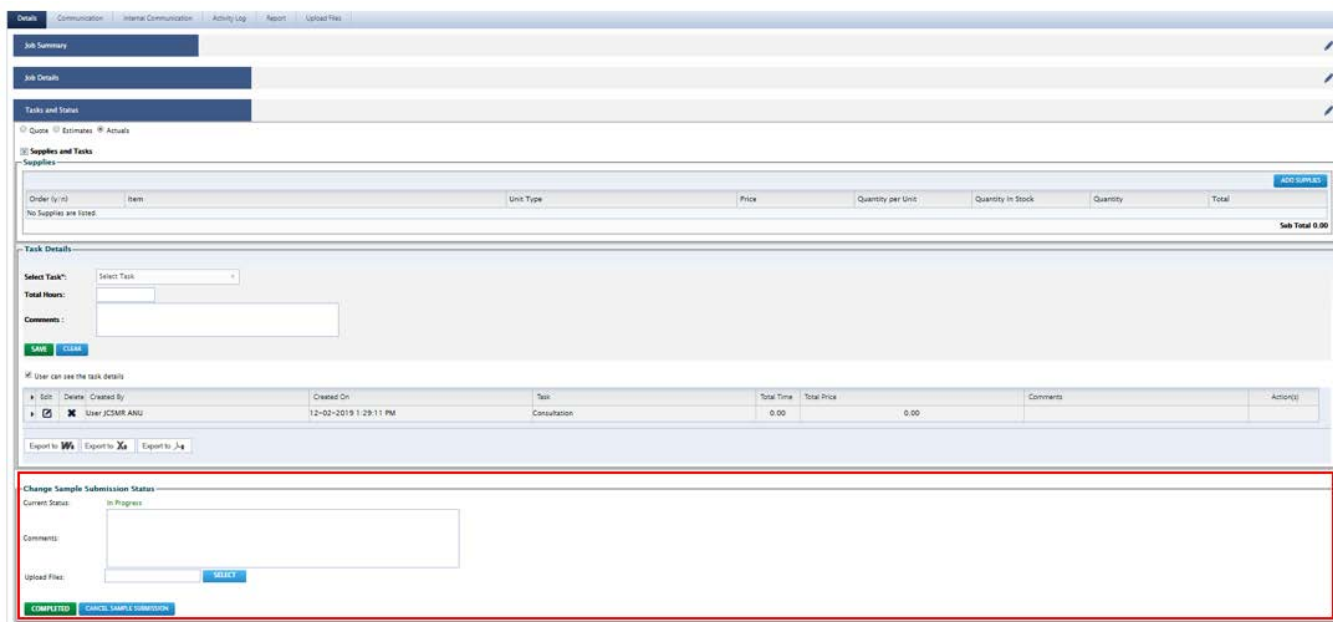
1. How-to guide 1: Registering with the Technical Workshops Work Management System
2. How-to guide 2: Submit a job request
3. How-to guide 3: Assign jobs
4. How-to guide 4: Complete a quote/estimate
5. How-to guide 5: Provide approvals

6. How-to guide 6: Managing tasks and Sharing Jobs
7. How-to guide 7: Manage timesheets
8. How-to guide 8: Manage purchases
9. How-to guide 9: Communications
10. How-to guide 10: Close a job

Closing a Job

Step A1:

Navigate to Technician> Inbox> Sample Submission/ Service Request and click on the job ID or name to open the Job card. Find the 'Change Sample Submission Status' section



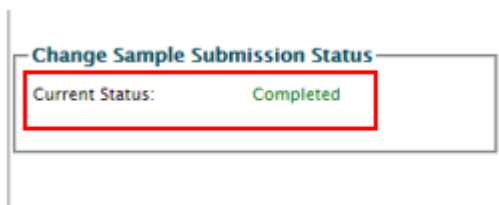
The screenshot shows a software interface with several sections. The 'Change Sample Submission Status' section is highlighted with a red border. It contains a 'Current Status' dropdown menu set to 'In Progress', a 'Comments' text area, and an 'Upload Files' button. Below this section are two buttons: 'COMPLETED' (highlighted with a red box) and 'CANCEL SAMPLE SUBMISSION'.

Step A2:

The 'Current Status' will be 'In Progress'. To close the Job, click on the 'Completed' Button, the status will update to 'Completed'



This screenshot shows the 'Change Sample Submission Status' section. The 'Current Status' is 'In Progress'. The 'COMPLETED' button is highlighted with a red box, indicating it has been clicked.



This screenshot shows the 'Change Sample Submission Status' section after the job has been closed. The 'Current Status' is now 'Completed', which is highlighted with a red box.

Re-opening a Job

Step B1:

If a Job is mistakenly moved to 'Completed', or needs to be re-opened for any other reason, you are able to do this from the inbox located at Technician> Inbox> Sample Submission/ Service Request. Select the job you wish to re-open and click on the 'Re-Open' button in the 'Actions' column.

Edits can now be made by opening the job.

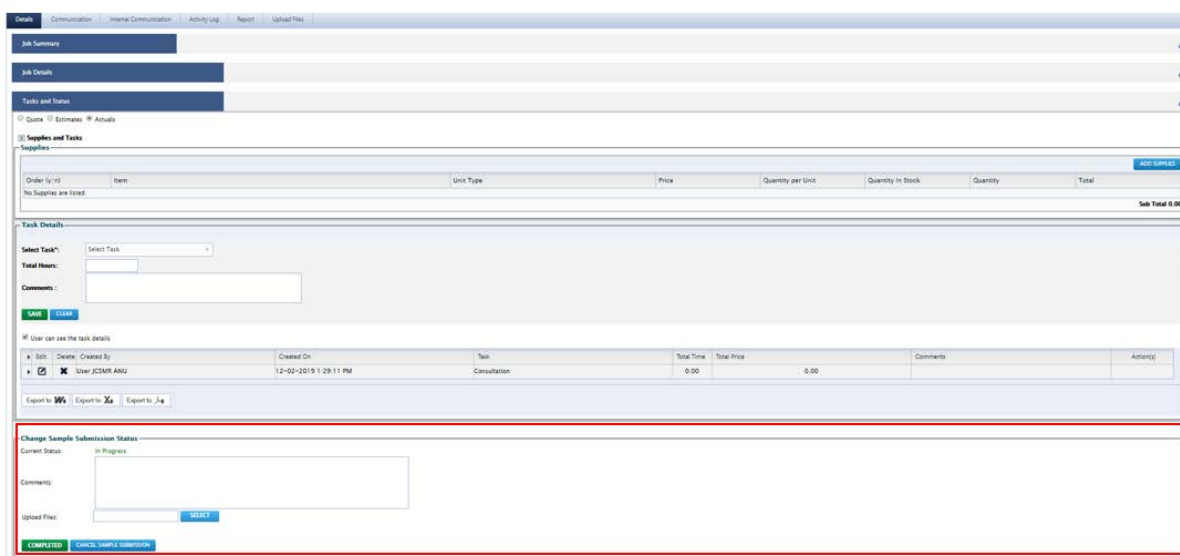
Date	ID	Form Name	Job Title	Summary	Client	Lab Name	Assigned To	Favorites	Status	Action(s)
11-02-2019 13:49	623	3_Consultation Request	Reopen Job		Richa Bhal	Default	User JCSMR ANU		Completed	Reopen

Canceling a Job

A job can be cancelled by a user before the job has been assigned, or by a technician at any stage of the process. If cancelling a job that has already been closed please reopen the job first.

Step C1:

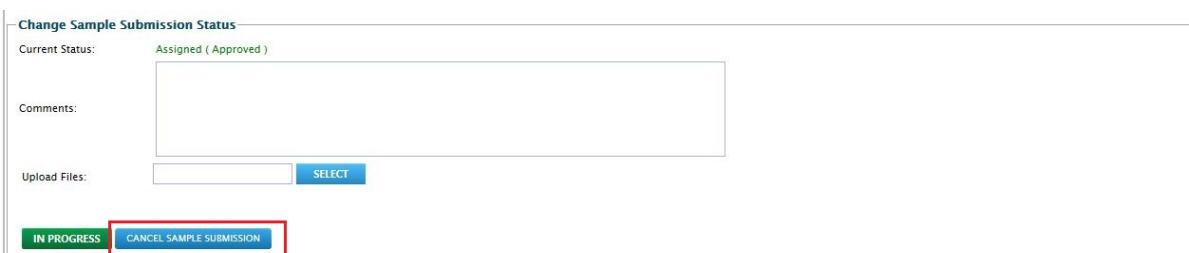
Navigate to Technician> Inbox> Sample Submission/ Service Request and click on the job ID or name to open the Job card. Find the 'Change Sample Submission Status' section.



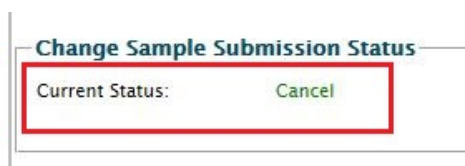
The screenshot shows the 'Job Card' interface with various sections like Job Summary, Job Details, Tasks and Status, and Supplies and Tasks. The 'Change Sample Submission Status' section at the bottom is highlighted with a red box. It contains a 'Current Status' dropdown set to 'In Progress', a 'Comments' text area, and an 'Upload Files' section with a 'SELECT' button. At the bottom of this section, there are two buttons: 'IN PROGRESS' and 'CANCEL SAMPLE SUBMISSION'.

Step C2:

To cancel the Job, click on the 'Cancel sample submission' Button, the status will update to 'Cancelled'. Please note that the job can be cancelled during any stage of the job, but hours already charged to the job will still be charged to the client.



This screenshot shows the 'Change Sample Submission Status' section with the 'Current Status' dropdown set to 'Assigned (Approved)'. The 'CANCEL SAMPLE SUBMISSION' button is highlighted with a red box.



This screenshot shows the 'Change Sample Submission Status' section with the 'Current Status' dropdown set to 'Cancel'. The dropdown menu is highlighted with a red box.