Idea Elan

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ANU Technician

How to Use Communications

Comprehensive Online Solution for
Lab and Core Facility Management

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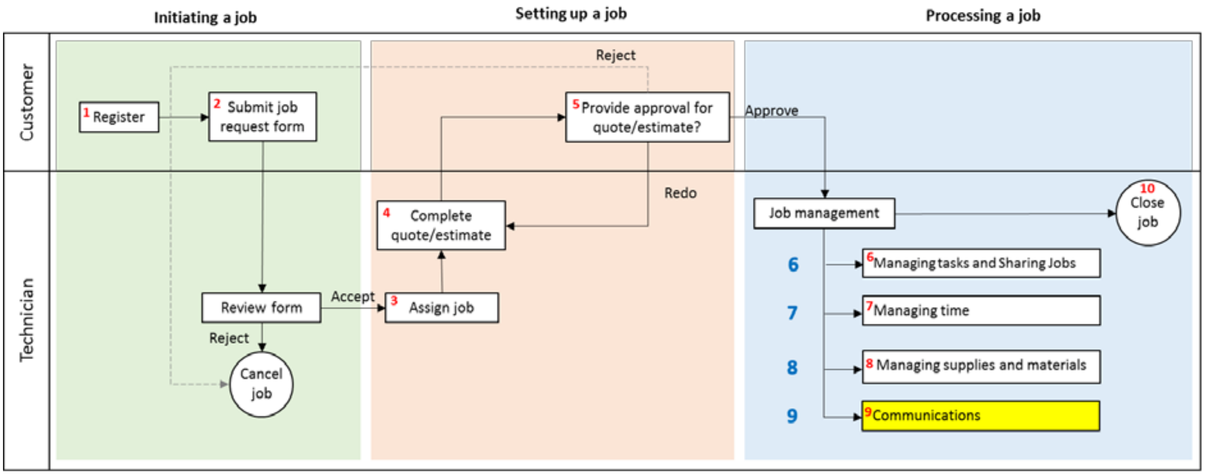
How to Use Communications

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how Communications are used in each job card as a way to discuss and track approvals in the Technical Workshops Work Management System. 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

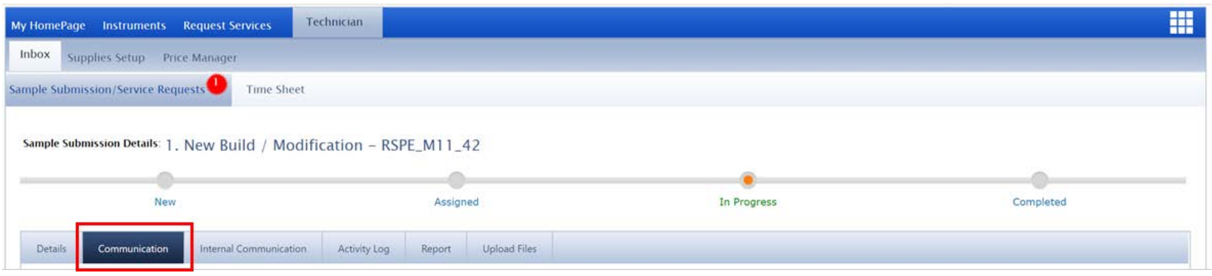
Please see the workflow chart below for more information on the system workflow and the associated 'how-to guide' for each step.



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

Step 1:

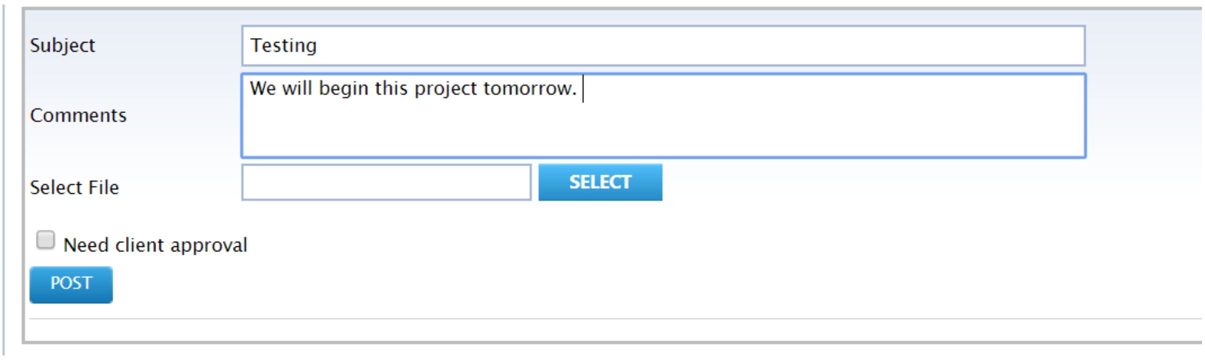
Navigate to Technician> Inbox> Sample Submission/ Service Request and click on the job ID or name to open the Job card. To communicate with a customer, select the 'Communication' tab. This will begin a communications thread between the customer and all the assigned technicians.



Note: The 'Internal Communications' can be used for discussions between the technicians only, the customers will not see this.

Step 2:

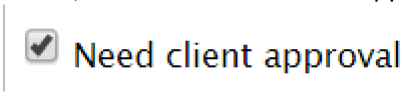
Enter a subject and comment. The subject is the email subject and comments are the body of the email.



Upload any relevant documentation. Any file type is permitted and the maximum size limit is 10mb.

Step 3:

If the communication requires formal approval e.g. for a customer to approve a design document or approve the purchase of materials etc., check the ‘Need client approval’



Step 4:

Click post to send the communication. A record of the communication always be stored in the communication tab.

Step 5:

If the communication requires approval. The customer will receive an email to approve or reject the request.

Step 6:

After approval, technicians assigned to the job will receive an email notification. All communication and approvals will be stored in the communications tab.