



Idea Elan

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2018

ANU Technician

Support Guide

Comprehensive Online Solution for
Lab and Core Facility Management

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1. Introduction

Idea Elan Work Management System is a cloud based system used by researchers, academics, technical staff and students across the ANU to request services from the Mechanical, Electronic, Electrical and Refrigeration Workshops. The Technical Workshops using the system includes:

Research School	Technical Workshop Facility
Research School of Physics and Engineering	<ul style="list-style-type: none"> • Mechanical Workshop • Electronics Unit
Research School of Earth Sciences	<ul style="list-style-type: none"> • Mechanical Workshop • Electronics Group
RSB/RSC Joint Workshop	<ul style="list-style-type: none"> • Mechanical Workshop • Electronics / Electrical Workshop • Refrigeration
John Curtin School of Medical Research	<ul style="list-style-type: none"> • Mechanical Workshop • Electronic Workshop

2. Generic Functions



Annotation	Label	Description
1	Quick Links	Access other facilities and quick requests such as software functions and access the help guide portal.
2	Make as Homepage	Make the current page the first page seen when logging in.
3	My Homepage	View a homepage that has specified Favourite Instruments, Requests etc. plus submitted Requests, and profile.
4	Instruments	Request instruments in a facility (workshop) and make reservations. (not applicable)
5	Request Services	Submit Sample Submission and Service requests.
6	Supplies	Place orders for supplies with the workshops.
7	My Items	Quick links to Homepage icons, My Favourite Instruments, Favourite Requests, My Profile etc.

3. Submitting a Request

Submitting requests to the technical Workshops are managed under the 'Request Services' tab:



Annotation	Label	Description
1	Request Services	Select to request services.
2	Sample Submission Forms	Sample Submission Forms are where the Technical Workshop request forms are located.
3	Select Facility	If you are registered with more than one facility e.g. both a Mechanical and Electronic Workshop, you can use this section to select which facility your request will be sent to.
4	Form Name	<p>Click the form name to begin submitting a form. Choose that form that most closely fits your requirements:</p> <p>Customer Forms</p> <ul style="list-style-type: none"> • <u><i>New Build/Modification</i></u> – You would like the Technical Workshop to build a new instrument/device/component or to modify an existing instrument/device/component • <u><i>Repair/Maintenance</i></u> – You require repair or maintenance services for an instrument or piece of research or teaching infrastructure • <u><i>Consultation request</i></u> – You’re unsure what it is that you require but you would like to arrange a time to discuss your requirements with a technician <p>Technician Forms</p> <ul style="list-style-type: none"> • <u><i>Workshop Job</i></u> – All the internal workshop related job request will come under this form • <u><i>Material Order</i></u> – This form is for ordering parts and supplies for customers.
5	Favourite	If you have a form that you use on a regular basis, select this option to save the form in ‘My Favourite Requests’ under ‘My Homepage’.

3.1. New Build / Modification and Repair / Maintenance

1 Job Details

Job Title*

Job Description*

Response Required by

Expected Completion Date

Attachments

Related Job ID

2 Hazards

1. Are you providing any equipment/parts?*

2. Are you providing any raw materials?*

3. Is a site visit required?*

Hazards Declaration

I agree that the information provided is true and accurate to the best of my knowledge.*

3 Lab and Payment/Account Information

Please search for valid fund manager and Charge Code before being able to click submit.

Submitted Date: 19-12-2018 15:06

Clients: Rachael Morgan(rachael.morgan@uni-melb.edu.au)

Secondary Cores: Select Secondary Cores

Designation*: Project Manager

Department Name: Service Improvement Group

Research School: Service Improvement Group

Fund Manager*: West,Lakshmi-West,Lakshmi

Phone:

Lab/Group*: Default [Set as default](#)

Charge Code1: r 21131 Enter project Id 50.00 % Business Improvement Group

Charge Code2: s ph600 01 50.00 % ARC DP15 - Ext led by Uni Mel - Regulating Australia's retail grocery sector - goals, actors and techniques

[Add more](#)

Special Instructions:

4 **5** **6** **7**

SUBMIT SAVE AS DRAFT PREVIEW CANCEL

Annotation	Label	Description
1	Job Details	<p>Captures information relating to the request:</p> <ul style="list-style-type: none"> <u>Job Title</u> – Short description of request (50 characters max) <u>Job Description</u> – Provide more detail regarding the request <u>Response Required By</u> – Indicate to the Technician how soon you require to be contacted to discuss your request <u>Expected Completion Date</u> – If you have any dependencies or a date which you require the job to be completed by, please let the technicians know here <u>Attachments</u> – Upload any attachments here. File size limit is 10MB. You can upload more than one document.

Annotation	Label	Description
		<ul style="list-style-type: none"> • <u>Related Job ID</u> – If this request is related to a previous job request, select from your previous requests displayed in the drop down list.
2	Hazards & Hazards Declaration	<p>These are conditional questions where you can provide additional information relating to:</p> <ul style="list-style-type: none"> • Any equipment / parts being supplied as part of the request • Any raw materials being supplied • Site visits • In the Hazards Declaration section, you have to click on the checkbox to acknowledge that the information provided by you is correct to the best of your knowledge.
3	Lab and Payment / Account Information	<ul style="list-style-type: none"> • <u>Secondary Cores</u> – Select additional facilities if you require your request to be submitted to more than one facility/workshop • <u>Clients</u> – If you are submitting on behalf of a customer/client, you can select the name from this field drop down • <u>Designation</u> – Your designation is your ANU role. You may have more than one designation displayed, if this is the case, please select the designation that is most relevant to your capacity as a Technical Workshop customer. e.g. someone who has both a staff role and a PhD role might select the PhD role if they are submitting a request in their capacity as a PhD student • <u>Department Name & Research School</u> – This information is related to the GLC Fund Manager • <u>Fund Manager</u> – The Fund Manager is the lead chief investigator, or the business or project manager in charge of the General Ledger Code, or GLC, that will be provided with each request submitted to the Technical Workshops. Please note that the Fund Manager displayed is your Supervisor. If this is not correct for this request, use the search feature to update to the correct Fund Manager. After searching, the designation will be required to be selected. This will then update the Department Name and Research School details. • <u>Phone</u> – Provide a contact number if you wish for the technicians to call you • <u>Lab / Group</u> – The term Lab/Group in the system is used for the sub groups defined under each department. We are not currently using this feature and all users are given a 'Default' Lab/Group. • <u>Charge Code</u> – Provide the Charge Code that this job will be charged to and then validate that it is correct through clicking the search icon. You may add more

Annotation	Label	Description
		<p>than one Charge Code, ensuring that the total percentage adds to 100%.</p> <ul style="list-style-type: none"> • <u>Special Instructions</u> – Put any instructions relating to payment here.
4	Submit	Click to submit the request to the Technical Workshop
5	Save as Draft	Click to save as draft to save the details for submission later
6	Preview	Click to preview your request
7	Cancel	Click to cancel your request without saving or submitting

Note: Fields with an asterisk * are mandatory selections. You will not be able to proceed unless the information required for this field is provided

3.2. Consultation Request

Annotation	Label	Description
1	Job Details	<p>Captures information relating to the request:</p> <ul style="list-style-type: none"> • <u>Job Title</u> – Short description of request (50 characters max) • <u>Description</u> – Provide more detail regarding the request • <u>Related Job ID</u> – If this request is related to a previous job request, select from your previous requests displayed in the drop down list • <u>Attachments</u> – Upload any attachments here. File size limit is 10MB. You can upload more than one document.
2	Lab and Payment / Account Information	<ul style="list-style-type: none"> • <u>Secondary Cores</u> – Select additional facilities if you require your request to be submitted to more than one facility/workshop

Annotation	Label	Description
		<ul style="list-style-type: none"> • <u>Designation</u> – Your designation is your ANU role. You may have more than one designation displayed, if this is the case, please select the designation that is most relevant to your capacity as a Technical Workshop customer. e.g. someone who has both a staff role and a PhD role might select the PhD role if they are submitting a request in their capacity as a PhD student • <u>Department Name & Research School</u> – This information is related to the GLC Fund Manager • <u>Fund Manager</u> – The Fund Manager is the lead chief investigator, or the business or project manager in charge of the General Ledger Code, or GLC, that will be provided with each request submitted to the Technical Workshops. Please note that the Fund Manager displayed is your Supervisor. If this is not correct for this request, use the search feature to update to the correct Fund Manager. After searching, the designation will be required to be selected. This will then update the Department Name and Research School details. • <u>Phone</u> – Provide a contact number if you wish for the technicians to call you • <u>Lab / Group</u> – The term Lab/Group in the system is used for the sub groups defined under each department. We are not currently using this feature and all users are given a 'Default' Lab/Group • <u>Special Instructions</u> – Put any instructions relating to payment here.

3.3. Workshop Request

The screenshot shows a web-based form for submitting a workshop request. It is divided into two main sections:

- Job Details:** This section includes fields for 'Job Title', 'Job Description', 'Building #', 'Room # or Location', 'Equipment Name', 'Related Job ID', and 'Attachments'. A red circle with the number '1' is positioned to the left of this section.
- Lab and Payment/Account Information:** This section includes fields for 'Submitted Date', 'Clients', 'Secondary Codes', 'Designation', 'Department Name', 'Research School', 'Fund Manager', 'Phone', 'Lab Group', and 'Special Instructions'. A red circle with the number '2' is positioned to the left of this section.

Annotation	Label	Description
1	Job Details	<p>Captures information relating to the request:</p> <ul style="list-style-type: none"> • <u>Job Title</u> – Short description of request (50 characters max) • <u>Description</u> – Provide more detail regarding the request • <u>Related Job ID</u> – If this request is related to a previous job request, select from your previous requests displayed in the drop down list • <u>Attachments</u> – Upload any attachments here. File size limit is 10MB. You can upload more one document.
2	Lab and Payment / Account Information	<ul style="list-style-type: none"> • <u>Secondary Cores</u> – Select additional facilities if you require your request to be submitted to more than one facility/workshop • <u>Clients</u> – If you are submitting on behalf of a customer/client, you can select the name from this field drop down. • <u>Designation</u> – Your designation is your ANU role. You may have more than one designation displayed, if this is the case, please select the designation that is most relevant to your capacity as a Technical Workshop customer. e.g. someone who has both a staff role and a PhD role, they would select the PhD role if they were submitting a request in their capacity as a PhD student • <u>Department Name & Research School</u> – This information is related to the GLC Fund Manager • <u>Fund Manager</u> – The Fund Manager is the lead chief investigator, or the business or project manager in charge of the General Ledger Code, or GLC, that will be provided with each request submitted to the Technical Workshops. Please note that the Fund Manager displayed is your Supervisor. If this is not correct for this request, use the search feature to update to the correct Fund Manager. After searching, the designation will be required to be selected. This will then update the Department Name and Research School details. • <u>Phone</u> – Provide a contact number if you wish for the technicians to call you • <u>Lab / Group</u> – The term Lab/Group in the system is used for the sub groups defined under each department. We are not currently using this feature and all users are given a 'Default' Lab/Group • <u>Special Instructions</u> – Put any instructions relating to payment here.

3.4. Material Orders Request

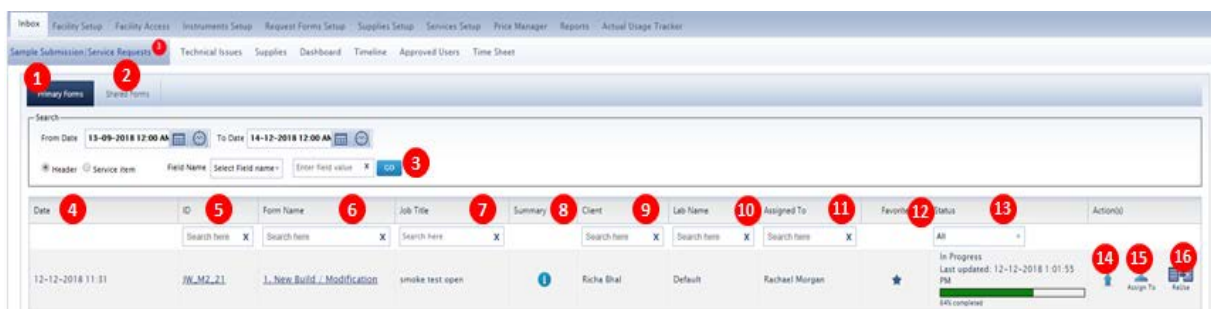
Annotation	Label	Description
1	Job Details	<p>Captures information relating to the request:</p> <ul style="list-style-type: none"> • <u>Job Title</u> – Short description of request (50 characters max) • <u>Description</u> – Provide more detail regarding the request.
2	Lab and Payment / Account Information	<ul style="list-style-type: none"> • <u>Secondary Cores</u> – Select additional facilities if you require your request to be submitted to more than one facility/workshop • <u>Clients</u> – If you are submitting on behalf of a customer/client, you can select the name from this field drop down • <u>Designation</u> – Your designation is your ANU role. You may have more than one designation displayed, if this is the case, please select the designation that is most relevant to your capacity as a Technical Workshop customer. e.g. someone who has both a staff role and a PhD role might select the PhD role if they are submitting a request in their capacity as a PhD student • <u>Department Name & Research School</u> – This information is related to the GLC Fund Manager • <u>Fund Manager</u> – The Fund Manager is the lead chief investigator, or the business or project manager in charge of the General Ledger Code, or GLC, that will be provided with each request submitted to the Technical Workshops. Please note that the Fund Manager displayed is your Supervisor. If this is not correct for this request, use the search feature to update to the correct Fund Manager. After searching, the designation will be required to be selected. This will then update the Department Name and Research School details • <u>Phone</u> – Provide a contact number if you wish for the technicians to call you.

Annotation	Label	Description
		<ul style="list-style-type: none"> <u>Lab / Group</u> – The term Lab/Group in the system is used for the sub groups defined under each department. We are not currently using this feature and all users are given a 'Default' Lab/Group <u>Special Instructions</u> – Put any instructions relating to payment here.

4. Submitted Requests

4.1. Viewing submitted requests

Your jobs, or jobs that are shared with you can be viewed under Inbox > Sample Submission/Service Requests.



Annotation	Label	Description
1	Primary Forms	Requests that are submitted for the current facility.
2	Shared Forms	Forms that are shared by a different facility.
3	Date Filter	Filter requests by searching within a date range.
4	Date	Date of submission.
5	ID	Unique ID given to each request.
6	Form Name	The type of request that was submitted.
7	Job Title	The title provided within the job details.
8	Summary	Click the 'i' to open a pop-up with the summary of the job details.
9	Client	Customer who submitted the job request. Field displays First Name and Last Name of the client.
10	Lab Name	Default.
11	Assigned To	The name of the facility which the request was submitted to.
12	Favourites	Selecting the star under the favourite's column will mark the form as a form used most often. The form will show at the top of the inbox as well as at the top of the list in the Timesheet Activity dropdown.
13	Status	Current status of the job. E.g. New, Assigned, In Progress, Completed. Time sheet selection. Each technician has the ability to make forms their favourite.
14	Arrow action	Allows user to upload documents directly to the request.
15	Assign To	Allows technician to assign job to other technicians or to himself by selecting a name from the dropdown.

Annotation	Label	Description
16	Reuse	Allows user to reuse the exact details of the job to a new job. Useful when a standing request is made to the workshop on a regular basis.

4.2. Managing submitted requests

View or modify the request by clicking on ID or Form Name.



Annotation	Label	Description
1	Status Tracker	See the status of the submitted request.
2	Details	This tab contains all the information regarding the request.
3	Communication	Used by Workshop Technicians, clients and other authorised individuals.
4	Internal Communication	Used by Workshop Technicians assigned to the job, to send messages to each other.
5	Activity Log	Records all time-stamped activity related to the request.
6	Report	Report builder tool, to generate template for reports.
7	Upload Files	All files uploaded to the request can be found here. Files can also be uploaded from this tab.

4.2.1 Job Summary

Annotation	Label	Description
1	Estimated Amount	The estimated cost provided by the Technician
2	Actual Fee	The total cost of the request to-date
3	Share To	Share the request with other users so that they can also manage the request

4.2.2 Job Details

This displays the answers that were provided within the request form when it was initially filled out. Workshop technicians can make modifications to this section.

Job Details

Job Details

Job Title: partial invoice 1 1

Job Description: • test

Response Required By: Within 2-3 Days

Required Completion Date:

Attachments:

Related Job ID: 1

Hazards

1. Does this job involve existing parts/equipment? No

2. Are you providing any raw materials? No

3. Is a site visit required? No

Hazards Declaration

I agree that the information provided is true and accurate to the best of my knowledge. True

4.2.3 Tasks, Purchases and Amount

Tasks and Status

1 Service Items/Supplies and Milestones

Service Items: No records to display. View Service Items Sub Total: 0.00

2 Supplies

Order Id	Item	Location	Price	Quantity per Unit	Quantity in Stock	Quantity	Total
01	Lights	Workshop 1 Bay 2	80.00	1	999	1	80.00
01	Connectors and Cable		89.18	406	407	2	178.36
01	Semiconductor		89.33	1	344	10	893.30
							Sub Total: 772.06

3 Task Details

Created By	Created On	Milestone	Total Time	Total Price	Comments
Andrew Wilson	14-11-2018 4:31:11 PM	Design	2.00	100.00	
Andrew Wilson	14-11-2018 4:31:01 PM	Setup/ Research	8.00	100.00	
Morgan Rachael	14-11-2018 8:51:53 AM	Risk Assessment	5.00	250.00	

Export to **MS** Export to **XLS** Export to **JPG**

4 Change Sample Submission Status

Current Status: In Progress

5 Files

Uploaded By: | Uploaded Date: | File Name: |
No files to display.

6 Purchase Record And Material

Purchase Items: No records to display.

Order Id	Supplier Name	Description	Part #	Quantity	Unit Cost	GST incl.	Total Cost	Comments	Order By	Delivered?
No records to display.										

7 Amount and Discounts

Sample Submission Fee: 1272.06

Discount: 0.00 % Amount

Actual Fee: 1272.06

8 **9**

Annotation	Label	Description
1	Service Items	This section displays any ad hoc costs that the technicians might need to add to the request
2	Supplies	Displays any costs associated with any materials that the workshops have used from their own stores
3	Task Details	Displays the labour time and costs entered by the technicians.
4	Change Sample Submission Status	Displays the current status. This is where the technicians update the status

Annotation	Label	Description
5	Files	Displays all attachments that have been uploaded to the request
6	Purchase Record and Material	Displays all parts and materials that were purchased from external suppliers for the request
7	Amount and Discount	Displays the running total cost of the request
8	Reuse	Allows user to re-use the exact details of the request to a new request. Useful when a standing request is made to the workshop on a regular basis
9	Close	Closes the request and returns the screen to the 'My Requests' view

4.3. Quotes and Estimates

Annotation	Label	Description
1	Quotes	Displays the quote screen to enter quoted amount.
2	Estimates	Displays the estimate ranges for the job request.
3	Actuals	Display Actual job cost of the job. This can only be viewed once an estimate or quote has been submitted and approved by the customer.

4.3.1 Quotes

Annotation	Label	Description
1	Amount(AUD)	Enter quoted amount.
2	Comments	You can enter any comments in this fields.
3	Upload Files	To upload any related files.
4	Submit Quote	To submit the quote to the customer.

4.3.2 Estimates

Annotation	Label	Description
1	Amount(AUD)	To select the estimate range.
2	Comments	You can enter any comments in this fields.
3	Upload Files	To upload any related files.
4	Submit Estimates	To submit the estimate to the customer.

4.4. Tasks

Annotation	Label	Description
1	Select Task	To select the relevant task for the job
2	Attachments	Add attachments if necessary
3	Start Stop timer	Click Start to begin timer while working on the task. Click stop when finished with the task. This will automatically calculate the time spent.
4	Total Hours	Enter time manually if start/stop timer is not used.
5	Flat Fee	Flat fee of the task to be charged for the job

Annotation	Label	Description
6	Comments	To add any comments related to the selected task.
7	Save	Used to save and record the task completed
8	User can see this...	Check the textbox if you would like the user to see your tasks
9	Edit	Used to edit the saved task
10	Delete	Delete the saved task

4.5. Status and Secondary Core

The screenshot shows a web interface for changing the status of a sample submission. It is divided into two main sections: 'Change Sample Submission Status' and 'Secondary Core'. The first section contains a 'Current Status' field showing 'In Progress', a 'Comments' text area, and an 'Upload Files' section with a file input and a 'SELECT' button. Below these are two buttons: a green 'COMPLETED' button and a blue 'CANCEL SAMPLE SUBMISSION' button. The second section, 'Secondary Core', contains a 'Secondary Cores' dropdown menu with the text 'Select Secondary Cores' and a blue 'SHARE' button. Red circles with numbers 1 through 7 are overlaid on the interface to indicate specific elements: 1 points to the 'Current Status' label, 2 to the 'Comments' label, 3 to the 'Upload Files' label, 4 to the 'COMPLETED' button, 5 to the 'CANCEL SAMPLE SUBMISSION' button, and 7 to the 'Secondary Cores' label.

Annotation	Label	Description
1	Current Status	Display the current status of the job request.
2	Comments	Add comments, if necessary.
3	Upload Files	To upload any file related to the current status.
4	Completed	To 'Complete' the job request.
5	Cancel	To 'Cancel' the job request.
6	Secondary Core	If the job is related to any other facility, use the secondary core field to the select the facility and share the job request. Once shared the job request will appear in the shared job tab of the facility to which it's shared.

4.6. Service Items

The screenshot shows the 'Service Items' page. At the top right, there is a blue button labeled 'ADD SERVICE ITEM' with a red circle containing the number 1 next to it. Below the button, the text 'No records to display.' is centered. At the bottom right, the text 'Sub Total: 0.00' is displayed.

The 'Add Service Item' dialog box contains three dropdown menus: 'Category' (set to 'All'), 'Group' (set to 'All'), and 'Service Item' (set to 'Select Service Item'). Below these are two buttons: a green 'SAVE' button and a blue 'CANCEL' button. Red circles with numbers 2, 3, 4, and 5 are placed next to the Category, Group, Service Item dropdowns, and the SAVE button respectively.

Annotation	Label	Description
1	Add Service Item	Click to add service items to the job request
2	Category	Select category of the service item
3	Group	Select group of service item
4	Service item	Select the service item
5	Save	Used to update and save the service item

4.6.1 Service Item Description

The screenshot shows the 'Service Item Description' page. It features a table with columns for Description, Cost Per Unit, Quantity, Upload, and Total Cost. Two rows are visible: 'Sandpaper' with a cost per unit of 4.00 and quantity of 23.00, and 'white paint' with a cost per unit of 25.00 and quantity of 1.00. The total cost for Sandpaper is 92.00 and for white paint is 25.00. Red circles with numbers 1 through 9 are placed over various elements: 1 over a remove icon, 2 over the Description column, 3 over the Cost Per Unit column, 4 over the Quantity column, 5 over the Upload column, 6 over the Total Cost column, 7 over the 'Add more items...' button, 8 over the 'SELECT' button for the Upload column, and 9 over the 'Sub Total: 117.00' text at the bottom right.

Annotation	Label	Description
1		Remove service item line
2	Description	Description of the service item
3	Cost Per Unit	The cost per unit of the service item
4	Quantity	Quantity of the service item
5	Select File	Provide upload of details of the service item
6	Total Cost	Auto-calculation of the cost of the service item
7	Add more items...	Used to add more service items. Enter a number and additional empty rows will be displayed.
8	Select	Used to provide document uploads
9	Sub total	Summation of the total cost of the service item

4.7. Supplies

The screenshot shows the 'Supplies' window with an empty table. A red circle '1' highlights the 'ADD SUPPLIES' button in the top right corner. Below the table, an 'Add Supplies' dialog box is open, with red circles '2' and '3' highlighting the 'Select Category' dropdown (set to 'All') and the 'Select Supplies' list (showing 'Resistors' and 'Screws' with checkboxes).

Annotation	Label	Description
1	Add Supplies	Button to click to add supplies or materials that are in your inventory to a job
2	Select Category	Filter the supplies or materials by category (set using the Supplies Set Up tab)
3	Select File	Select the type of supplies or materials you want to add to the job

4.7.1 Adding Supplies

The screenshot shows the 'Supplies' window with a table containing two items. Red circles '1' through '9' highlight the columns: 'Order (y/n)', 'Item', 'Location', 'Unit Type', 'Price', 'Quantity per Unit', 'Quantity in Stock', 'Quantity', and 'Total'. A red circle '10' highlights the 'Sub Total 0.00' at the bottom right. The 'ADD SUPPLIES' button is also visible in the top right.

Annotation	Label	Description
1	Order (y/n)	Select to add the part to the job or not
2	Item	The item name
3	Location	Will display where the item is located if it is recorded in the system
4	Unit Type	If the item is sold by a measurement rather than an individual unit e.g. kg then the unit type will be displayed here
5	Price	The price per unit in AUD
6	Quantity per Unit	Displays how many are sold per unit
7	Quantity in Stock	Displays how many are in stock
8	Quantity	Technician can enter the quantity required. Number can be up to three decimal places
9	Total	The total cost of the individual line item
10	Sub Total	The total costs of all the supplies added to the job

4.8. Communication

[PRINT SAMPLE SUBMISSION FORM PDF](#)

Annotation	Label	Description
1	Subject	Enter the subject matter of your communication
2	Comments	Provide further detail of the subject matter
3	Select File	To upload any related files
4	Need client approval	Select the box if the communication request client's approval
5	Post	Updates the communication and provides email notification of the message

4.9. Internal Communication

Annotation	Label	Description
1	Subject	Enter the subject matter of your communication
2	Comments	Provide further detail of the subject matter
3	Select File	To upload any related files
4	Post	Updates the communication and provides email notification of the message

4.10. Upload Files

Date	File Name	File Uploaded By	Download
17-12-2018	Customer SC bugs.docx	Daniel Lee	DOWNLOAD
17-12-2018	Customer SC bugs.docx	Daniel Lee	DOWNLOAD

Annotation	Label	Description
1	Attach	Used to attach any relevant document(s)
2	Upload	Used to upload the relevant document(s) to the system
3	Download	Download previously uploaded document

5. Timesheet

5.1 Timesheet (Week)

Annotation	Label	Description
1	Day	Change the timesheet to view by each day of the week
2	Week	Change the timesheet to view by week
3		Add new activity
4		Used to skip to the previous or following week's timesheet
5	Activity	Description of the type of work done
6	Task	Description of work relevant to the activity
7	Comments	Provide notes related to the activity
8	<input type="text" value="0.00"/>	Enter the time used to perform the task
9	Save	Save the changes made to the timesheet
10	Submit	Submit your time sheet

5.2 Timesheet (Day)

Annotation	Label	Description
1	Day	Change the timesheet to view by each day of the week
2	Week	Change the timesheet to view by week
3		Add new activity
4		Used to skip to the previous or following day's timesheet
5	Activity	Description of the type of work done
6	Task	Description of work relevant to the activity
7	Comments	Provide notes related to the activity

8	<input type="text" value="0.00"/>	Enter the time used to perform the task
9	Start	Click to start the timer to track the time used for the task
10	Save	Save the changes made to the timesheet

6. Supplies Setup




Annotation	Label	Description
1	Order Supplies	Tab technician can use to record supplies ordered from external suppliers
2	Products	Tab where technician can view their inventory and add new products or update existing ones
3	Product Suppliers	Tab where technician can create a list of their supplier(s)
4	Product Categories	The tab where technicians can create categories in order to group Products

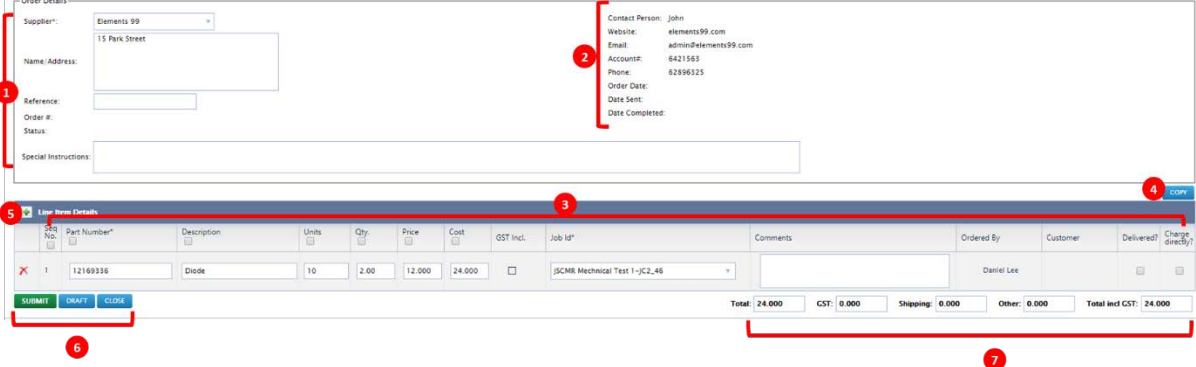
6.1 Order Supplies

Order Number	Order Date	Last Updated Date	Supplier Name	Contact Name	Created By	Last Updated By	Status	Action(s)
SR56	18-12-2018 11:43	18-12-2018 11:43	Hannah's test supplier	Test supplier	Hannah Cheney	Hannah Cheney	Sent	
SR55	12-12-2018 15:27	12-12-2018 15:35	test Supplier	test	Rachael Morgan	Rachael Morgan	Sent	
SR54	12-12-2018 09:13	12-12-2018 09:13	test Supplier	test	Rachael Morgan	Rachael Morgan	Sent	
SR53	11-12-2018 10:21	12-12-2018 08:50	test Supplier	test	Rachael Morgan	Rachael Morgan	Sent	

Annotation	Label	Description
1	Create New Supplier Order	Used to create a new supply order
2	Order Number	Sequential ID of the order placed. Technicians can use the search box to filter the order number
3	Order Date	Date when the order was placed. Technician can use the search box to filter the order date
4	Last Updated Date	The date that the order was last updated
5	Supplier Name	Description of the name of the supplier. Technician can use the search box to filter the supplier name
6	Contact Name	Description of the contact name of the supplier. Technician can use the search box to filter the contact name of the supplier.
7	Created By	Description of the user that created the supply order. Technician can use the search box to filter by the user that created the supply order.
8	Last Updated By	Description of the user that last updated the supply order. Technician can use the search box to filter by the user that last updated the supply order.


Annotation	Label	Description
9	Status	Description of the status of the supplier order. Technician can use the dropdown box to filter the supply orders depending on its status.
10		Used to delete supply orders

6.1.2 Creating New Supply Order

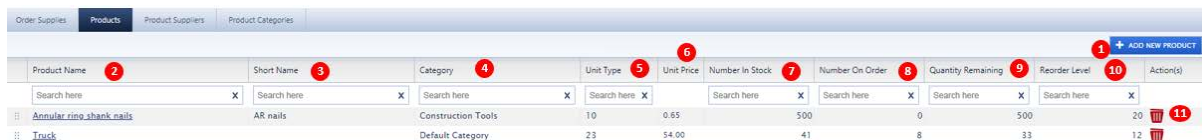








The screenshot shows a web form for creating a new supply order. It is divided into two main sections: 'Order Details' and 'Line Item Details'. The 'Order Details' section includes fields for Supplier (a dropdown menu), Name/Address, Reference, Order #, Status, and Special Instructions. A 'Contact Person' section is also present with fields for Name, Website, Email, Account#, Phone, Order Date, Date Sent, and Date Completed. The 'Line Item Details' section is a table with columns for Seq No, Part Number, Description, Units, Qty, Price, Cost, GST Incl., Job Id, Comments, Ordered By, Customer, and Delivered. A summary row at the bottom shows Total, CST, Shipping, Other, and Total Incl GST. Red circles with numbers 1 through 7 highlight specific elements in the form.

Annotation	Label	Description
1	Order Detail	Provides information of the supplier/supply order <ul style="list-style-type: none"> • <u>Supplier</u> – Dropdown box to select Supplier • <u>Name/Address</u> – Address of Supplier (Pre-populated) • <u>Reference</u> – Reference number of the order • <u>Order #</u> – System generated figure once order has been submitted • <u>Special Instruction</u> – Comment box to provide additional information of the order
2	Order Detail	Provides information of the supplier/supply order <ul style="list-style-type: none"> • <u>Contact Person</u> – Contact person of the supplier (Pre-populated) • <u>Website</u> – Supplier’s website details (Pre-populated) • <u>Email</u> – Supplier’s email details (Pre-populated) • <u>Account#</u> – Supplier’s account number (Pre-populated) • <u>Phone</u> – Supplier’s phone number (Pre-populated) • <u>Order Date</u> – Date the order was created (system generated) • <u>Date Sent</u> – Date the order was submitted (system generated) • <u>Date Completed</u> – Date the order is complete (system generated)
3	Line Item Details	Supply order details <ul style="list-style-type: none"> • <u>Seq No.</u> – Sequential number of each line (system generated) • <u>Part Number</u> – Part number of the order (mandatory field) • <u>Description</u> – Description of the order


Annotation	Label	Description
		<ul style="list-style-type: none"> • <u>Units</u> – Units of the order (free text) • <u>Qty</u> – Quantity of the order (mandatory field) • <u>Price</u> – Price of the order • <u>Cost</u> – Cost of the order (system generated) • <u>GST Incl.</u> – Select whether cost includes GST • <u>Job Id</u> – Select the relevant Job ID for the supply order (mandatory) • <u>Comments</u> – Additional comments regarding the line item • <u>Ordered By</u> – Technician that places the order • <u>Customer</u> – Customer that the order is for (system generated) • <u>Delivered?</u> – Select if the order has been delivered • <u>Charge directly?</u> – Select if the order is to be charged directly to the customer
4	Copy	Allows Technician to copy values from the supply order by selecting the tick box in the columns of the line item details
5		Add new line item
6	Submit order	Actions relevant to the supply order <ul style="list-style-type: none"> • <u>Submit</u> – Submit the supply order request • <u>Draft</u> – Save the supply order • <u>Close</u> – Close the supply order. Returns Technician to the Supply Setup page
7	Total	Summary of the total cost <ul style="list-style-type: none"> • <u>Total</u> – Summation of the cost of all line items (system generated) • <u>GST</u> – GST amount (system generated) • <u>Shipping</u> – Shipping cost of the supply order (editable field) • <u>Other</u> – Other associated cost of the supply order (editable field) • <u>Total incl GST</u> – Summation of Total, Shipping and Other costs
8		

6.2 Products




Product Name	Short Name	Category	Unit Type	Unit Price	Number In Stock	Number On Order	Quantity Remaining	Reorder Level	Action(s)
Annular ring shank nails	AR nails	Construction Tools	10	0.65	500	0	500	20	  
Truck		Default Category	23	54.00	41	8	33	12	  

Annotation	Label	Description
1	Add New Product	Select to add new product to inventory
2	Product Name	Description of full product name. Technicians can use search box to filter by product name
3	Short Name	Description of the short product name. Technicians can use search box to filter by short product name.

4	Category	Description of the category of the product. Technicians can use search box to filter by category
5	Unity Type	Description of the unit type of the product. Technicians can filter search box to filter by unit type
6	Unit Price	Description of the price per unit of the product
7	Number In Stock	Description of the amount in stock of the product. Technicians can filter search box to filter by number in stock
8	Number On Order	Description of the number of units that are on order of the product. Technicians can filter search box to filter by the number products that are on order.
9	Quantity Remaining	Description of the quantity remaining in inventory. Technicians can filter search box to filter by the quantity remaining
10	Reorder Level	Description of the reorder level of the product. Technicians can filter search box to filter by reorder level
11		Function to delete product from the system. Technicians cannot delete products that are currently on order.

6.2.1 Creating New Product


Annotation	Label	Description
1	Add New Product	Select to add new product to inventory
2	Product Name	Description of full product name. Technicians can use search box to filter by product name
3	Short Name	Description of the short product name. Technicians can use search box to filter by short product name.
4	Category	Description of the category of the product. Technicians can use search box to filter by category
5	Unity Type	Description of the unit type of the product. Technicians can filter search box to filter by unit type
6	Unit Price	Description of the price per unit of the product
7	Number In Stock	Description of the amount in stock of the product. Technicians can filter search box to filter by number in stock
8	Number On Order	Description of the number of units that are on order of the product. Technicians can filter search box to filter by the number products that are on order.


9	Quantity Remaining	Description of the quantity remaining in inventory. Technicians can filter search box to filter by the quantity remaining
10	Reorder Level	Description of the reorder level of the product. Technicians can filter search box to filter by reorder level
11		Function to delete product from the system. Technicians cannot delete products that are currently on order.

6.3 Product Suppliers

Order Supplies | Products | **Product Suppliers** | Product Categories

1 + ADD NEW SUPPLIER

Supplier Name 2	Contact Name 3	Email 4	Designation 5	Phone 6	Home Page 7	Action(s)
Search here X	Search here X	Search here X	Search here X	Search here X	Search here X	
Elements 99	John	contact@elements99.com		0265285475	elements99.com	 8


Annotation	Label	Description
1	Add New Supplier	Click to add a new supplier to the product suppliers list
2	Supplier Name	Description of the name of the supplier. Technicians can click the name of the supplier to edit details. Technicians can use search box to filter by the supplier name
3	Contact Name	Description of the contact name of the supplier. Technicians can use search box to filter by the contact name
4	Email	Description of the email details of the supplier. Technicians can use search box to filter by the email address
5	Designation	Description of the role/designation of the supplier. Technicians can use search box to filter by the designation
6	Phone	Description of the phone number of the supplier. Technicians can use search box to filter by the phone number
7	Home Page	Description of the supplier's website. Technicians can use search box to filter by supplier's website
8		Click to delete the supplier from the product suppliers list

6.3.1 Adding New Supplier

Annotation	Label	Description
1	Supplier Name	Description of the supplier's name (mandatory)
2	Contact Name	Description of the contact name of the supplier (mandatory)
3	Designation	The role of the contact person
4	Email	Description of the email address of the supplier (mandatory)
5	Account#	Description of the account number of the supplier
6	Website	Description of the supplier's website
7	Supplier Information	Contact information of the supplier <ul style="list-style-type: none"> • <u>Address</u> – Address of the supplier • <u>City</u> – City that the supplier is located • <u>State</u> – State that the supplier is located • <u>Zip Code</u> – Zip/Postal code of the supplier • <u>Country</u> – Country that the supplier is located • <u>Fax</u> – Fax number of the supplier • <u>Phone</u> – Phone number of the supplier
8	Save	Click to save supplier details
9	Close	Click to close the screen. Information will not be save if screen is closed.

6.4 Product Categories

Annotation	Label	Description
1	Add New Category	Click to add a new category

2	Category Name	Description of the category name. Technicians can click the category name to edit details. Technicians can use search box to filter by category name
3	Description	Description of the category type
4		Click delete the category from the product categories list

6.4.1 Adding New Category



1 Category*
2 Description*
3 Is Active?
SAVE CLOSE
4 5

Annotation	Label	Description
1	Category	Description of the category name of the product (mandatory)
2	Description	Description of the category (mandatory)
3	Is Active?	Tick box whether the category is active. If inactive, users will be unable to select the category when adding a new product
4	Save	Click to save the category
5	Close	Click the close the screen. Details will not be saved if user closes the screen