Idea Elan

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2018

ANU Customer

Job Request Submission
Comprehensive Online Solution for
Lab and Core Facility Management

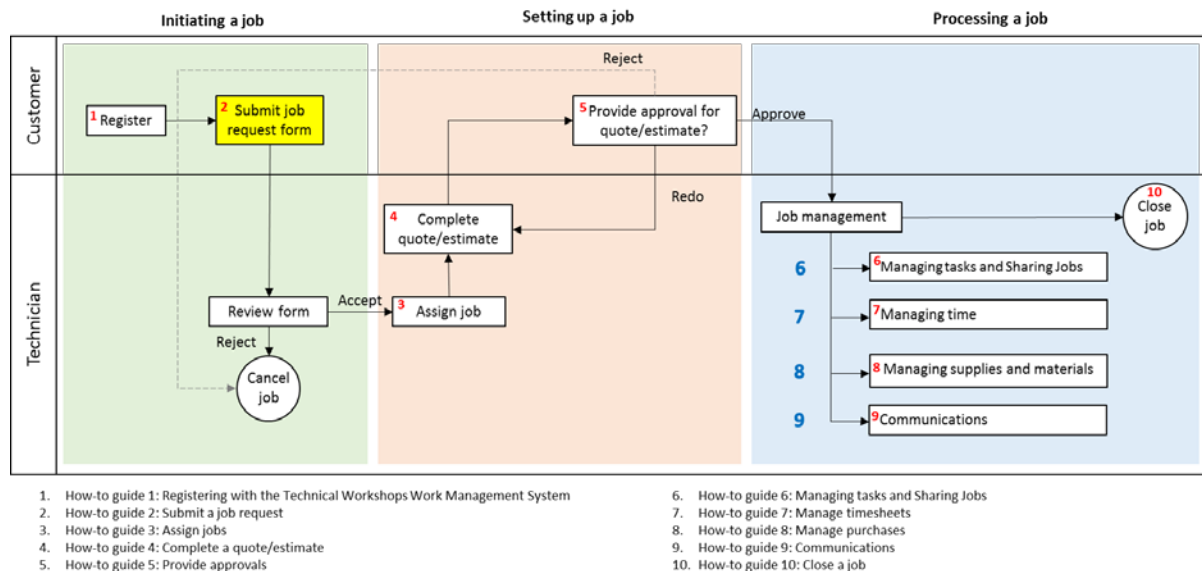13800 Coppermine Rd,
Herndon, VA 20171
Phone: 1-800-506-5905
Email: support@IdeaElan.com

How to Submit a Job Request

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how to submit a job request form to the Technical Workshops using the Technical Workshops Work Management System. This guide will also provide steps on how users can share job request with other users in the 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

A. Job Request

Step A1:

Click on the 'Request Services' tab in the menu bar.

Note – if the 'Request Services' tab is not visible, you will have to refresh the system. This is accomplished using the system refresh button which is located at the top right hand side of the screen, next to your name:

Step A2:

Select the type of the form and click on form name to open the form.

Note – Please note the name of the 'Core Facility' displayed to ensure that you are submitting the request to the correct workshop. If there are multiple duplicate forms or it is the wrong Workshop, select the correct Workshop using the 'Select Facility' dropdown from the top right corner of the screen

Step A3:

Complete the job details section.

- Enter the job title. Please note you can enter maximum 50 characters in the job title.
- Enter job description, you can use formatting tools provided in the top of the box.
- Select 'Response Required By' from the drop down.
- Select 'Expected Completion Date' by clicking on calendar icon next to the field.

- You can attach one or more documents by clicking on select file button. Please note that there is a maximum size limit of 10MB per file upload.
- If this request is related to a previous job request, select the 'Related Job ID' from your previous requests displayed in the drop down list

Step A4:

Complete the Hazards section. The Hazards section is only relevant to the "New Build and Modification" and "Repair / Maintenance" forms.

Hazards

1. Does this job involve existing parts/equipment?*   Select ▼

2. Are you providing any raw materials?*   Select ▼

3. Is a site visit required?*   Select ▼

Hazards Declaration

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

Hazards

1. Does this job involve existing parts/equipment?*   Yes ▼

A. Serial Number (if relevant):

B. Asset Number (if relevant):

C. Equipment or part description:

D. Has the equipment/part been in contact with any hazardous substances?*   Yes ▼ ⓘ

i. Provide details of hazardous substances *

ii. What decontamination process have been undertaken*   ⓘ

iii. Attach any evidence of the decontamination process   SELECT FILE ⓘ

E. Can the equipment/parts emit hazardous energy?*   Select ▼ ⓘ

- In the Hazards section, indicate if you are providing any equipment/parts or raw materials to the workshop.
- If you select 'Yes', then please enter further information below.
- Similarly please indicate if the job requires a site visit.
- If you select 'Yes', then please enter further information below.

Note – Depending on the nature of you responses you may be required to answer further questions on evidence of provenance or decontamination process. You can hover-over the information icon for assistance while entering your responses.

Step A5:

Provide Hazards Declaration.

- In Hazard declaration section, please click on the checkbox to acknowledge that the information provided by you is correct to the best of your knowledge.

Step A6:

Validate Charge Code

- In the Lab and Payment/Account Information section, please enter the General Ledger Code (Charge Code) that will be used to recover the charges for using the Technical Workshop services
- Please enter the "Charge Code" in the format: Fund Code, for example, R, Q or S; the "Department ID"; and the "Project ID" if applicable.
- Click on the search icon to validate the Charge Code.
- If the charge code is validated it will display the Charge Code description in green text.
- In case of an invalid Charge Code it will display 'Invalid Charge Code' in red text
- Please note, you will be able to submit the job only if you provide a valid charge code.
- You are able to provide multiple charge codes by selecting 'Add more,' ensuring that the total percentage adds to 100%.

Step A7

Validate Fund Manager

- In the Lab and Payment/Account information section, please check if the Fund Manager selected during the registration is correct for this job.
- If a different fund manager is required for this job, please click the search icon next to the 'Fund Manager' field.
- Enter the First Name , Last Name and click on the second 'Search' icon

- In the designation field select the relevant role from the drop down. There may be more than one result.
- Once selected the fund manager will be updated and their corresponding Department and Research School will be displayed.
- The Fund Manager can be updated each time a new request to the Technical Workshop is submitted.

Step A8

Click 'Submit' to submit the job request

If you select "Submit" without providing all mandatory information, the missing information will be highlighted in red at the bottom of the screen.
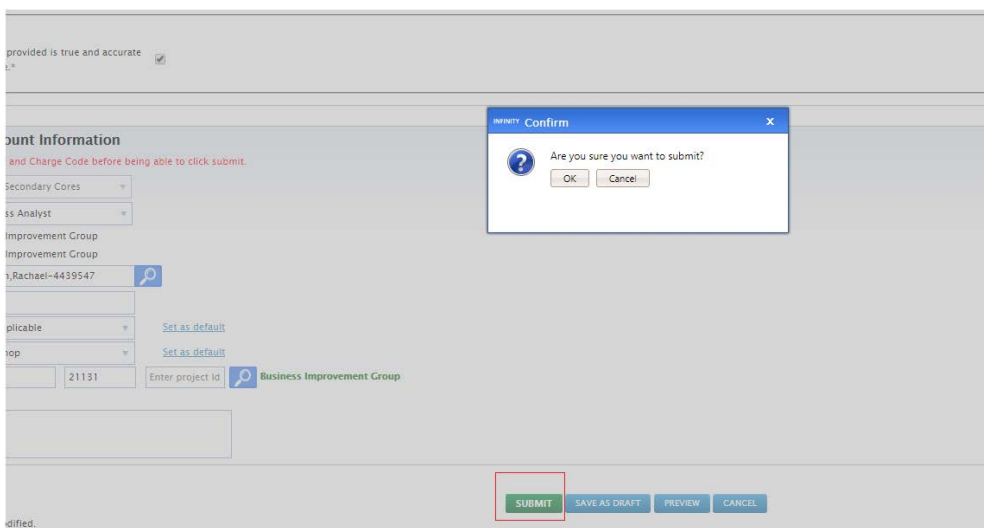
Step A9

All requests, including drafts, will be saved in your "My Requests" tab, under the "My Homepage" heading.
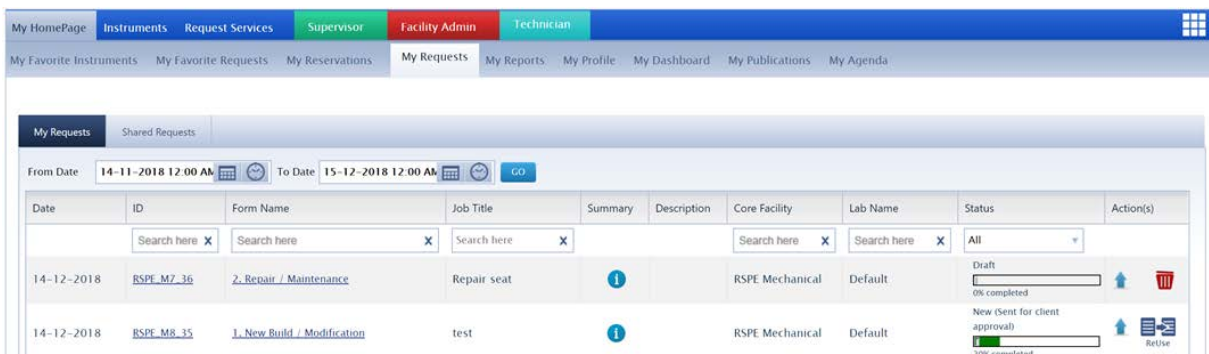
Following submission of a request to the Technical Workshop, a technician will contact you to discuss your request further.

B. Sharing Form

The "Share To" function allows you to share job requests with other users in the system.

Step B1

Click 'My Request' to access your request inbox

Step B2

Click the Job that you would like to share
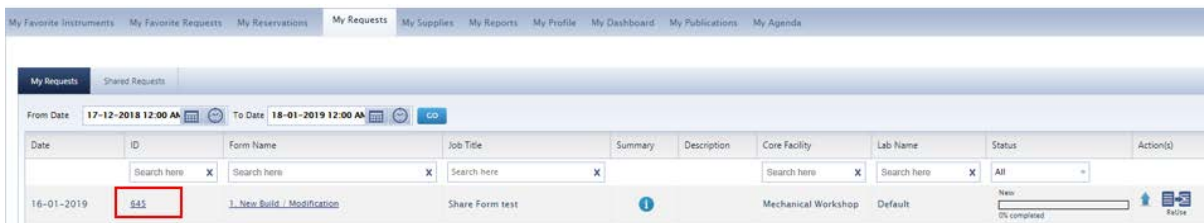
Step B3

Click the "Job Summary" Tab
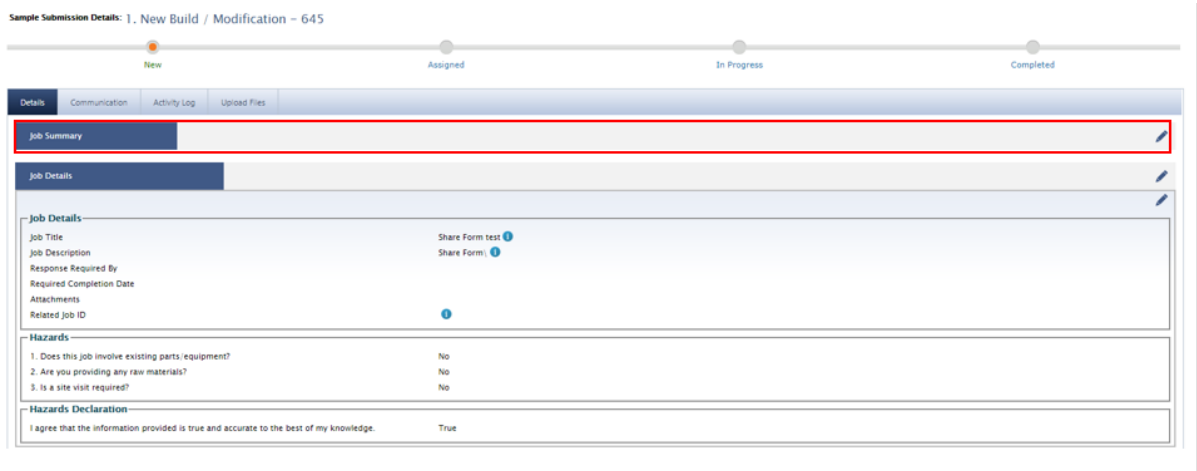
Step B4

Click the "Share To" dropdown box

Step B5

Select the user that you would like to share the form with

Note – *Only Users that are affiliated to your Research School will appear in the dropdown list. You can also select from more than one user.*

Tip – You can type in the dropdown box to filter the user

Step B6

Click "Share"

C. Viewing Shared Forms

Step C1

Click 'My Request' to access your request inbox

Step C2

Click 'Shared Request'