



Idea Elan

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2018

ANU Customer

Job Request Submission

Comprehensive Online Solution for
Lab and Core Facility Management

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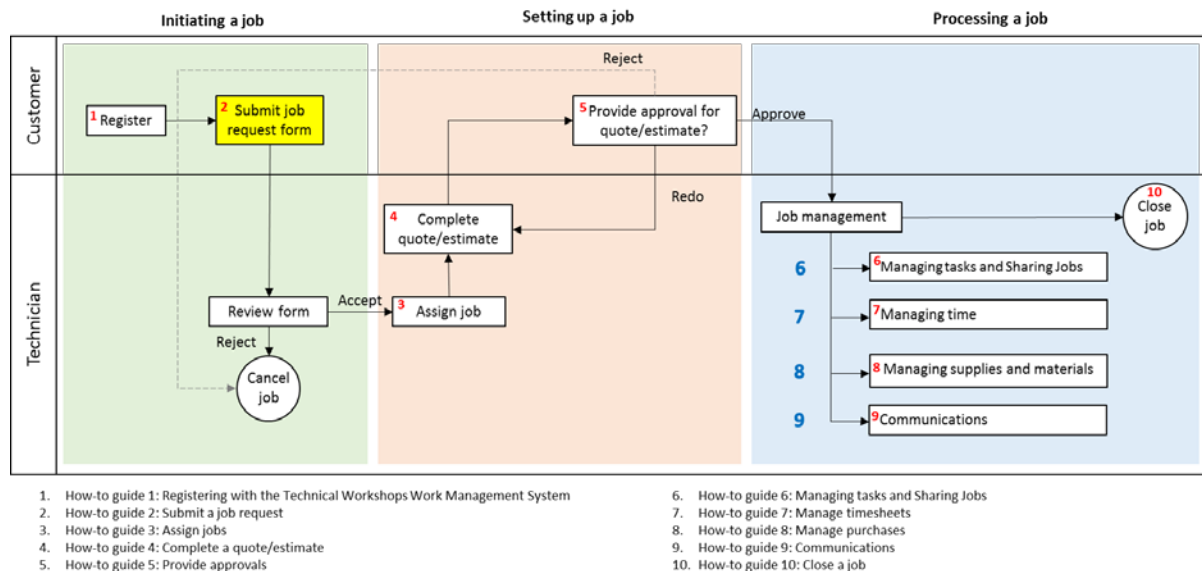
Email: support@IdeaElan.com

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.



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

Welcome to RSPE Mechanical

Form Name	Core Facility	Favorites	Help	Report Issue
1. New Build / Modification	RSPE Mechanical	☆	🔊	🐛
2. Repair / Maintenance	RSPE Mechanical	☆	🔊	🐛
3. Consultation Request	RSPE Mechanical	☆	🔊	🐛

Australian National University

Request Services

Select Facility: RSPE Mechanical

Welcome to RSPE Mechanical

Form Name	Core Facility	Favorites	Help	Report Issue
1. New Build / Modification	RSPE Mechanical	☆	🔊	🐛
2. Repair / Maintenance	RSPE Mechanical	☆	🔊	🐛
3. Consultation Request	RSPE Mechanical	☆	🔊	🐛

Select Facility: RSPE Mechanical

Step A3:

Complete the job details section.

Job Details

Job Title*

Job Description*

B *I* U Times New Roman 16px

Response Required By

Required Completion Date

Attachments

Related Job ID

- 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?*

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.*

Hazards

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

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?* ⓘ

i. Provide details of hazardous substances *

ii. What decontamination process have been undertaken* ⓘ

iii. Attach any evidence of the decontamination process ⓘ

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

2. Are you providing any raw materials?*

Yes

A. Raw material description:

B. Provide a Safety Data Sheet (SDS) or evidence of the provenance of the material if available **SELECT FILE** ⓘ

3. Is a site visit required?*

Yes

A. Is an induction or an onsite escort required?*

Select

B. Indicate potential site hazards:

Select

C. Please note any hazard not listed

- 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 your 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.

Hazards Declaration

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

- 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

Lab and Payment/Account Information
Please search for valid fund manager and Charge Code before being able to click submit.

Designation*: Year 3 Management Cadet
Department Name: Directors Office
Research School: Human Resources
Fund Manager*: Morgan,Rachael-4439547
Phone:
Lab/Group*: Default [Set as default](#)

Charge Code1:	Q	34510	2115	50.00 %	Discretionary Q - Batterham
Charge Code2:	R	14000	Enter project id	50.00 %	General Cash Float

[Add more](#)

Special Instructions:

[SUBMIT](#) [SAVE AS DRAFT](#) [PREVIEW](#) [CANCEL](#)

- 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

Lab and Payment/Account Information
Please search for valid fund manager and Charge Code before being able to click submit.

Secondary Cores: Select Secondary Cores
Designation*: Project Manager
Department Name: Service Improvement Group
Research School: Service Improvement Group
Fund Manager*: West,Lakshmi-5222536 First Name*: Last Name*: Designation*:
Phone:
Lab/Group*: Default [Set as default](#)
Charge Code*: Enter fund code* Enter dept id* Enter project id

Special Instructions:

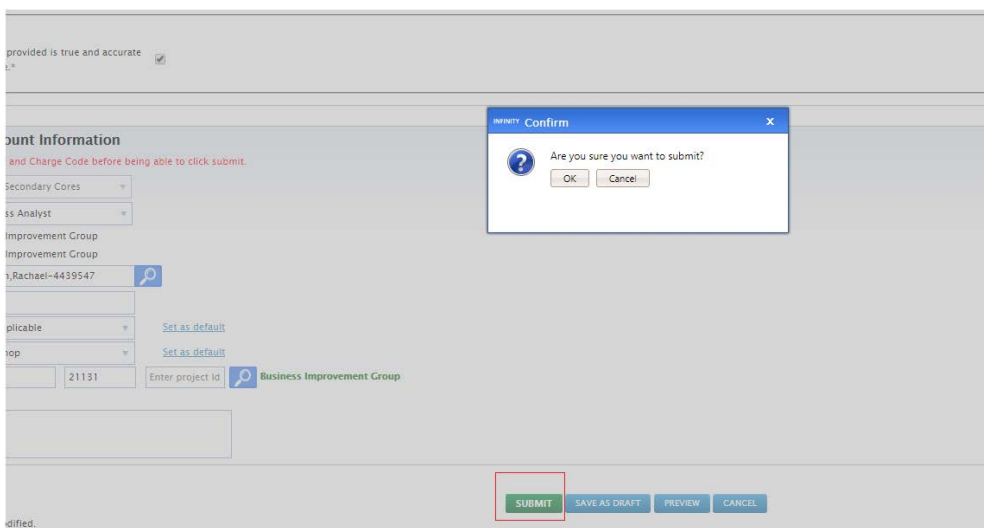
- In the Lab and Payment/Account information section, please check if the Fund Manager selected during the registration is correct for this job.
- If a different fund manager is required for this job, please click the search icon next to the ‘Fund Manager’ field.
- Enter the First Name , Last Name and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

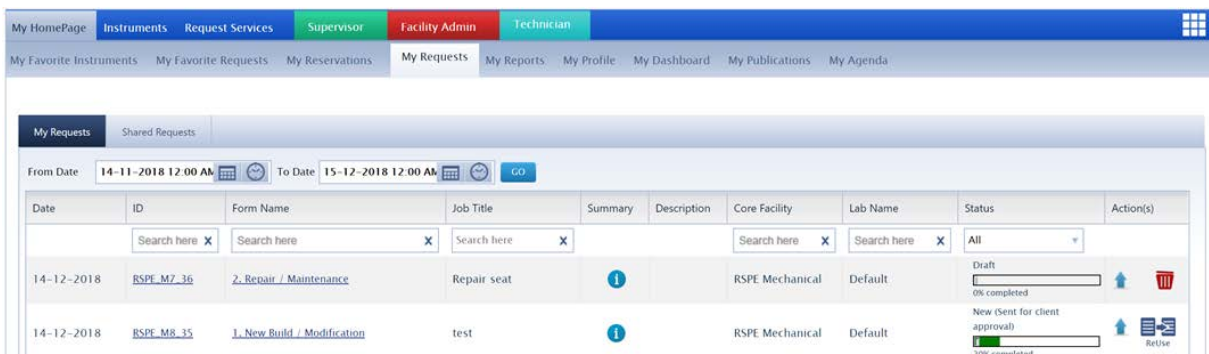
Click 'Submit' to submit the job request

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.

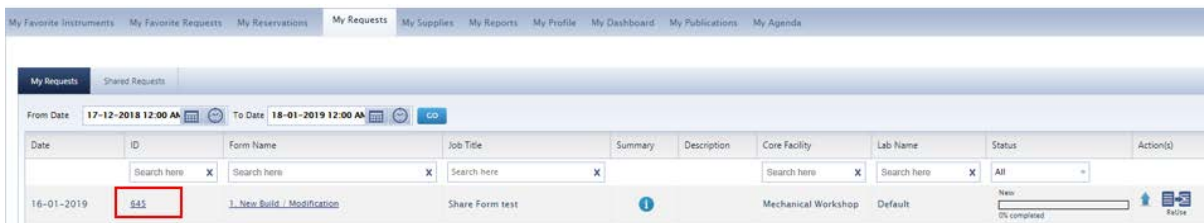
Step B1

Click ‘My Request’ to access your request inbox



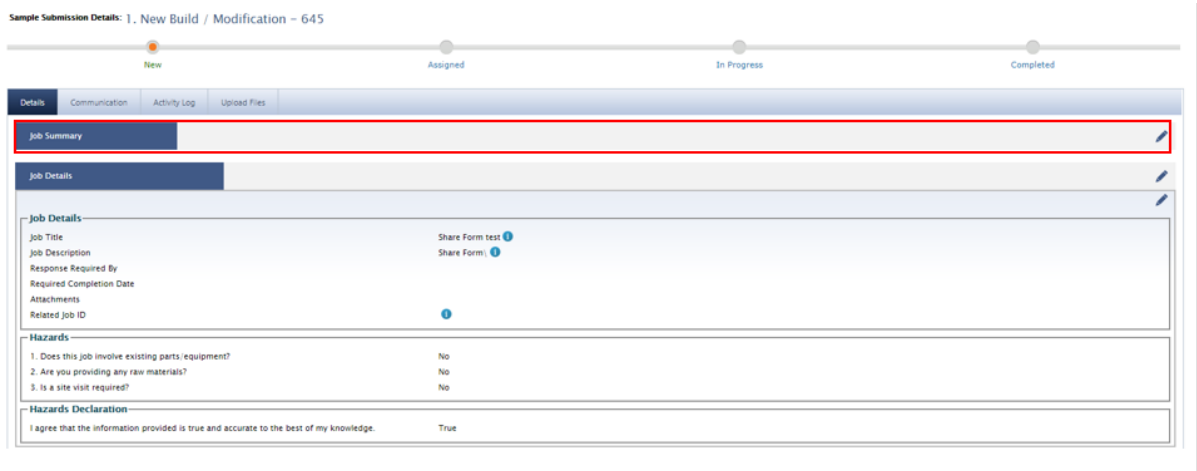
Step B2

Click the Job that you would like to share



Step B3

Click the “Job Summary” Tab



Step B4

Click the “Share To” dropdown box

Job Summary			
Sample Submission Id:	645	Submitted Date:	16-01-2019 14:52
Client:	Richa Bhal	Client Phone No:	
Designation:	Business Analyst	Department Name:	Service Improvement Group
Research School:	Service Improvement Group	Fund Manager:	Morgan,Rachael
Charge Code:	ARC DP15 – Ext led by Uni Mel – Regulating Australia's retail grocery sector – goals, actors and techniques(s-ph600-01)-100.00%	Submitted By:	Richa Bhal
Quoted Amount:	0.00 AUD	Actual Fee:	0.00 AUD
Estimated Completion Date:		Completion Date:	
Lab /Group:	Default	Secondary Cores:	
Special Instructions:			
Share To :	<input type="text" value="Select clients"/>	<input type="button" value="SHARE"/>	

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.

Job Summary			
Sample Submission Id:	645	Submitted Date:	16-01-2019 14:52
Client:	Richa Bhal	Client Phone No:	
Designation:	Business Analyst	Department Name:	Service Improvement Group
Research School:	Service Improvement Group	Fund Manager:	Morgan,Rachael
Charge Code:	ARC DP15 – Ext led by Uni Mel – Regulating Australia's retail grocery sector – goals, actors and techniques(s-ph600-01)-100.00%	Submitted By:	Richa Bhal
Quoted Amount:	0.00 AUD	Actual Fee:	0.00 AUD
Estimated Completion Date:		Completion Date:	
Lab /Group:	Default	Secondary Cores:	
Special Instructions:			
Share To :	<input type="text" value="Select clients"/>	<input type="button" value="SHARE"/>	

Job Details	
<input type="checkbox"/> Check All	
<input type="checkbox"/> Elan Idea	
<input type="checkbox"/> External Account	
<input type="checkbox"/> Proctor Jessica	

Job Details	
Job Title	Share Form test
Job Description	Share Form

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

Job Summary			
Sample Submission Id:	645	Submitted Date:	16-01-2019 14:52
Client:	Richa Bhal	Client Phone No:	
Designation:	Business Analyst	Department Name:	Service Improvement Group
Research School:	Service Improvement Group	Fund Manager:	Morgan,Rachael
Charge Code:	ARC DP15 – Ext led by Uni Mel – Regulating Australia's retail grocery sector – goals, actors and techniques(s-ph600-01)-100.00%	Submitted By:	Richa Bhal
Quoted Amount:	0.00 AUD	Actual Fee:	0.00 AUD
Estimated Completion Date:		Completion Date:	
Lab /Group:	Default	Secondary Cores:	
Special Instructions:			
Share To :	<input type="text" value="Exter"/>	<input type="button" value="SHARE"/>	

Job Details	
<input type="checkbox"/> Check All	
<input type="checkbox"/> External Account	

Job Details	
Job Title	Share Form test
Job Description	Share Form

Step B6

Click "Share"

Details Communication Activity Log Upload Files

Job Summary

Sample Submission Id:	645	Submitted Date:	16-01-2019 14:52
Client:	Richa Bhal	Client Phone No:	
Designation:	Business Analyst	Department Name:	Service Improvement Group
Research School:	Service Improvement Group	Fund Manager:	Morgan,Rachael
Charge Code:	ARC DP15 - Ext led by Uni Mel - Regulating Australia's retail grocery sector - goals, actors and techniques(s-ph600-01)-100.00%	Submitted By:	Richa Bhal
Quoted Amount:	0.00 AUD	Actual Fee:	0.00 AUD
Estimated Completion Date:		Completion Date:	
Lab/Group:	Default	Secondary Cores:	
Special Instructions:			
Share To:	External Account	<input type="button" value="SHARE"/>	Shared successfully.

C. Viewing Shared Forms

Step C1

Click 'My Request' to access your request inbox

My HomePage Instruments Request Services

My Favorite Instruments My Favorite Requests My Reservations **My Requests** My Reports My Profile My Dashboard My Publications My Agenda

Step C2

Click 'Shared Request'

My Favorite Instruments My Favorite Requests My Reservations **My Requests** My Supplies My Reports My Profile My Dashboard My Publications My Agenda

My Requests **Shared Requests**

From Date: 17-12-2018 12:00 AM To Date: 18-01-2019 12:00 AM GO

Date	ID	Form Name	Job Title	Summary	Description	Core Facility	Lab Name	Status	Action(s)
	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>			<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	All	
No request's to display									

My Requests **Shared Requests**

From Date: 17-12-2018 12:00 AM To Date: 18-01-2019 12:00 AM GO

Date	ID	Form Name	Job Title	Summary	Description	Core Facility	Lab Name	User	Status
16-01-2019	645	1. New Build / Modification	Share Form test			Mechanical Workshop	Default	Richa Bhal	New (sent for client approval) <input type="text"/> OK completed