



Idea Elan



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2018

ANU Technician

How to Manage Tasks

Comprehensive Online Solution for
Lab and Core Facility Management

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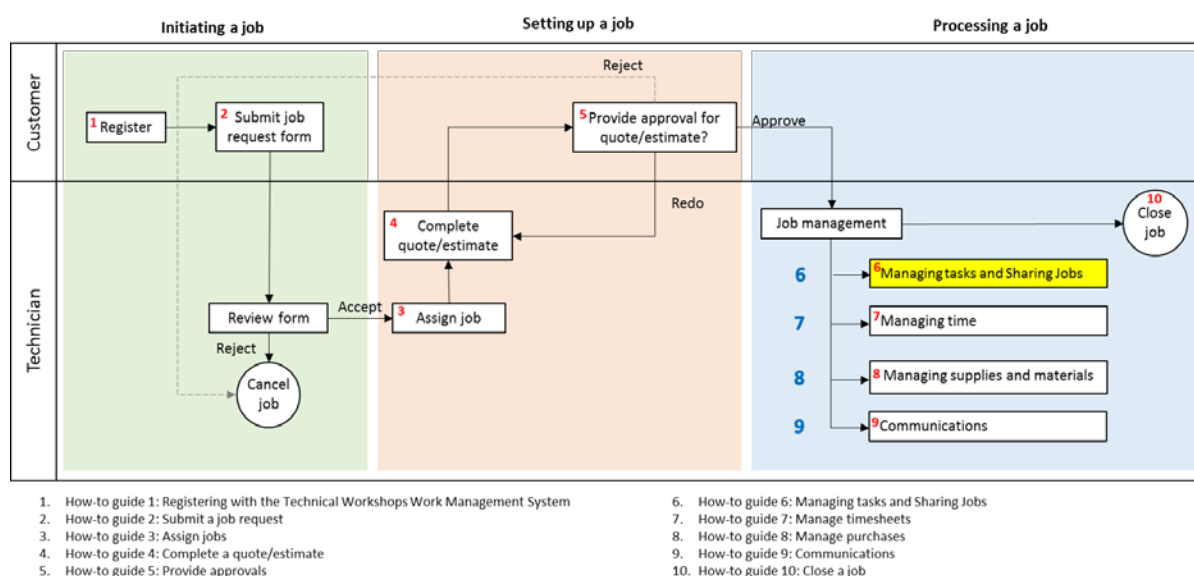
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How to Manage Tasks and Sharing Jobs

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how to use the tasks feature in the Technical Workshops Work Management System. This guide will also provide you steps on how to share jobs to other facilities. 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.

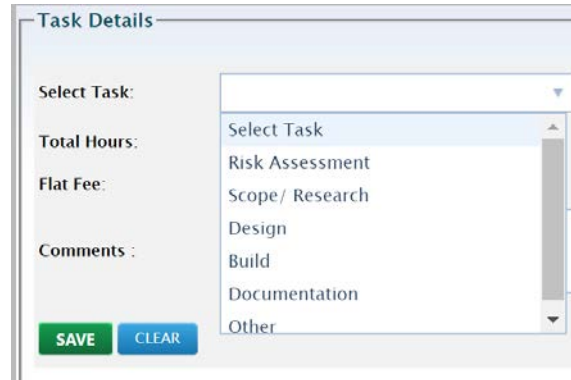


A. Managing Tasks

Step A1:

Note: The job will need to be 'In Progress' before you are able to manage and add tasks. This means that the job will have been assigned to at least one technician and that the customer has approved a quote or estimate (see other How-to guides in the series for detailed explanations).

When viewing a job in the Sample Submission Details, navigate to the 'Task Details' section in the Tasks and Status tab. Select a relevant task from the dropdown list:



Task Details

Select Task:

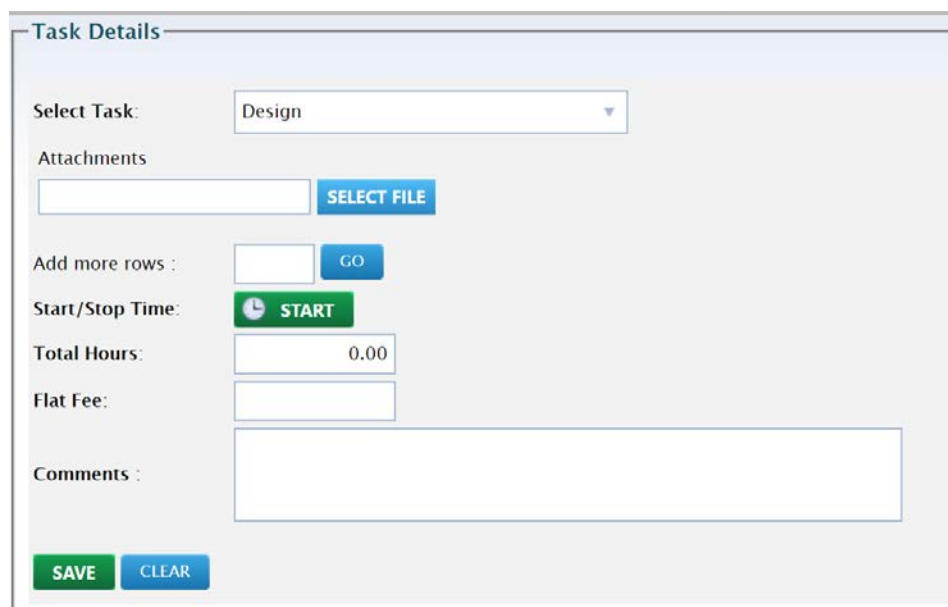
Total Hours:

Flat Fee:

Comments :

Step A2:

Once a tasks in selected, a number of additional fields are displayed.



Task Details

Select Task:

Attachments

Add more rows :

Start/Stop Time:

Total Hours:

Flat Fee:

Comments :

Step A3:


- a. You can add attachments to the tasks. Any file type can be uploaded and the maximum file size limit is 10mb. More attachments/ files can be uploaded by clicking entering the required number in the 'Add more rows' and clicking 'Go'.



Attachments




Add more rows :

- b. You can click 'Start' to begin logging your time using the timer. Click 'Stop' when finished.

Start/Stop Time: 

Start/Stop Time:  00h 00m 06s

If you wish to use the 'Start/Stop Time' but need to leave the page, click the 'Save' button at the bottom of the 'Task Details' panel and the tasks will be saved in the tasks log with the ability to stop the timer from the actions column

▶ Edit	Delete	Created By	Created On	Task	Flat Fee	Total Time	Total (Flat Fee + Price)	Comments	Action(s)
▶ 		Rachael Morgan	20-12-2018 2:28:25 PM	Design	0.00	0.00	0.00		 00h 02m 42s

- c. To log time without the 'Start/Stop Time' feature, enter time manually in the total hours field.


Total Hours:

- d. You can affiliate an additional flat fee with the task by entering a rate into the flat fee section.

Flat Fee:




- e. Comments can be added to a task as well.

Comments :

- f. When finished, click the  button
 g. Repeat for each milestone/ task.

Step A4:

Edit tasks in the tasks log. Click on the edit button in the 'Edit' column.

▶ Edit	Delete	Created By	Created On	Task	Flat Fee	Total Time	Total (Flat Fee + Price)	Comments	Action(s)
▶ 		Rachael Morgan	20-12-2018 2:28:25 PM	Design	0.00	0.00	0.00		 00h 02m 42s

Use the edit section to open the tasks fields. The 'Total Hours', 'Flat Fee' and 'Comments' can be edited.

Task fields
✕

Total Hours:

Flat Fee:

Comments :

UPDATE
CLOSE

Note: Tasks will only appear the in the tasks log once tasks have been saved. Step 3(f).

B. Sharing a Job with another Facility

Step B1:

Note: The shared job function can only be accessed once a quote or estimate has been approved by the client and the job has been assigned to a Technician. If you are unsure on how to assign a job, please view the [‘How-to guide 3 - Assign jobs’](#). If you are unsure on how to submit a quote or estimate please view the [‘How-to guide 4 - Complete a quote or estimate’](#).

When viewing a job in Sample Submission Details, navigate to the Task and Status Tab

Tasks and Status

Quote Estimates Actuals

Service Items/Supplies and Tasks

Service Items

No records to display. Sub Total: 0.00

Supplies

Order (y/n)	Item	Location	Unit Type	Price	Quantity per Unit	Quantity In Stock	Quantity	Total
No Supplies are listed. Sub Total: 0.00								

Task Details

Select Task:

Total Hours:

Flat Fee:

Comments :

SAVE CLEAR

User can see the task details

Edit	Delete	Created By	Created On	Task	Flat Fee	Total Time	Total (Flat Fee + Price)	Comments	Actions
No fields to display.									

Export to **W** | Export to **X** | Export to **J**

Change Sample Submission Status

Current Status: Assigned (Approved)

Comments:

Upload Files: SELECT

IN PROGRESS CANCEL SAMPLE SUBMISSION

Step B2:

Under the “Change Sample Submission Status”, select “In Progress”

Change Sample Submission Status

Current Status: Assigned (Approved)

Comments:

Upload Files: SELECT

IN PROGRESS
CANCEL SAMPLE SUBMISSION

Step B3:

Select the Workshop/Facility that you would like to share the job with and then click “Share”

Change Sample Submission Status

Current Status: In Progress

Comments:

Upload Files: SELECT

COMPLETED
CANCEL SAMPLE SUBMISSION
Submitted Successfully

Secondary Core

Secondary Cores: Mechanical Workshop SHARE

Check All

Mechanical Workshop

Electronic Workshop

Mechanical Workshop

Files

Uploaded By	Date	File Name
No files to display		

Note: If required, you are able to share the Job with multiple facilities.

Once the job has been shared, the Job card will be updated to indicate the relevant shared facilities.

Change Sample Submission Status

Current Status: In Progress

Comments:

Upload Files:

Sample submission shared successfully to selected secondary cores

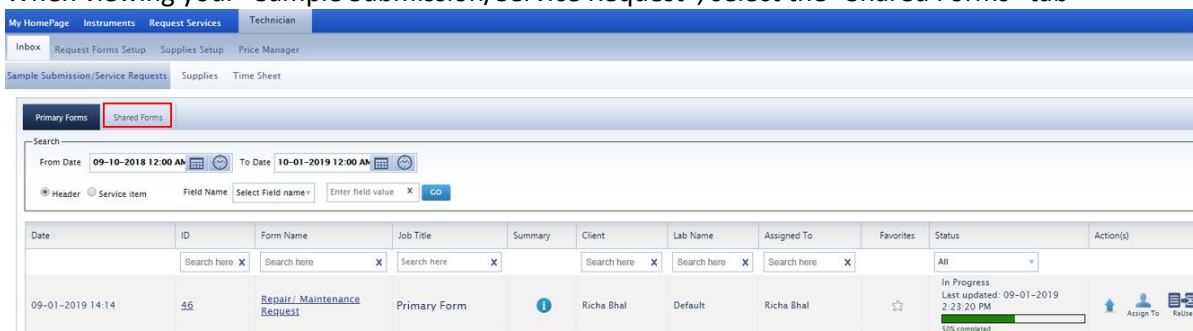
Secondary Core

Secondary Cores: Mechanical Workshop **Shared Cores:** Mechanical Workshop

C. Viewing a Shared Form

Step C1:

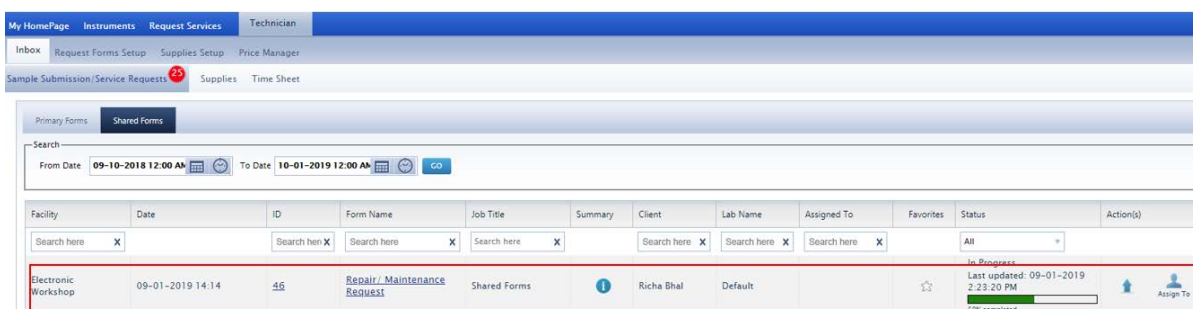
When viewing your “Sample Submission/Service Request”, select the “Shared Forms” tab



Date	ID	Form Name	Job Title	Summary	Client	Lab Name	Assigned To	Favorites	Status	Action(s)
09-01-2019 14:14	46	Repair / Maintenance Request	Primary Form	i	Richa Bhal	Default	Richa Bhal	<input type="checkbox"/>	In Progress Last updated: 09-01-2019 2:23:20 PM <div style="width: 50%; background-color: green; height: 5px;"></div> 50% completed	<input type="button" value="Assign To"/> <input type="button" value="Raise"/>

Step C2:

Jobs that have been shared to your facility will be displayed in the “Shared Forms” tab



Facility	Date	ID	Form Name	Job Title	Summary	Client	Lab Name	Assigned To	Favorites	Status	Action(s)
Electronic Workshop	09-01-2019 14:14	46	Repair / Maintenance Request	Shared Forms	i	Richa Bhal	Default		<input type="checkbox"/>	In Progress Last updated: 09-01-2019 2:23:20 PM <div style="width: 50%; background-color: green; height: 5px;"></div> 50% completed	<input type="button" value="Assign To"/>

Note: A Technician must be assigned to work and record time against the job. Please view the ‘How-to guide 3 - Assign jobs’ if you are unsure on how to assign a Job.