



**Idea Elan**

**Idea Elan**

**2018**

**ANU Customer**

**Support Guide**

Comprehensive Online Solution for  
Lab and Core Facility Management

13800 Coppermine Rd,

Herndon, VA 20171

Phone: 1-800-506-5905

Email: [support@IdeaElan.com](mailto:support@IdeaElan.com)

## Contents

1. Introduction .....	3
2. Generic Functions .....	3
3. Submitting a Request.....	4
3.1. New Build / Modification <i>and</i> Repair / Maintenance.....	5
3.2. Consultation Request.....	7
4. Your Requests .....	8
4.1. Viewing your requests .....	8
4.2. Managing your request.....	9
4.2.1 Job Summary.....	9
4.2.1 Job Details .....	10
4.2.1 Tasks, Purchases and Amount .....	10

## 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"> <li>Mechanical Workshop</li> <li>Electronics Unit</li> </ul>
Research School of Earth Sciences	<ul style="list-style-type: none"> <li>Mechanical Workshop</li> <li>Electronics Group</li> </ul>
RSB/RSC Joint Workshop	<ul style="list-style-type: none"> <li>Mechanical Workshop</li> <li>Electronics / Electrical Workshop</li> <li>Refrigeration</li> </ul>
John Curtin School of Medical Research	<ul style="list-style-type: none"> <li>Mechanical Workshop</li> <li>Electronic Workshop</li> </ul>

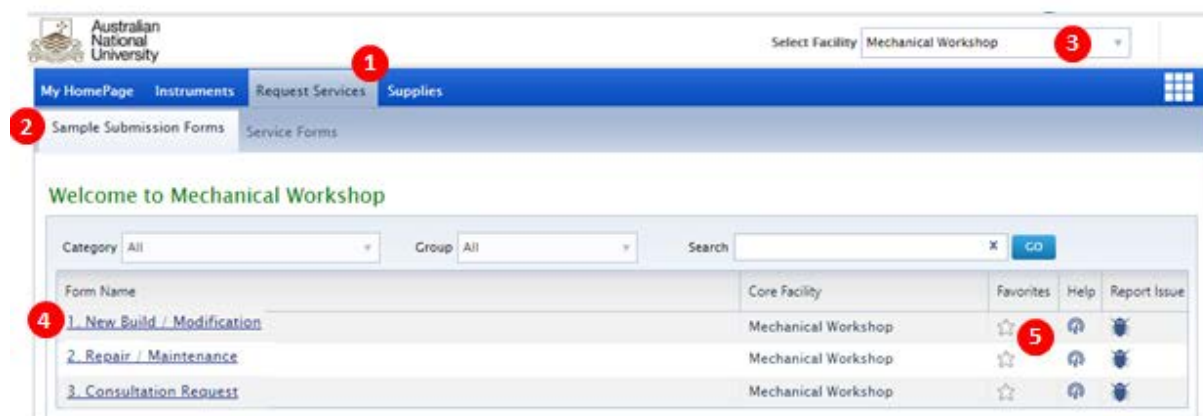
## 2. Generic Functions



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, then use this section to select the correct facility that you want to submit your request to
4	Form Name	Click the form name to begin submitting a form. Choose the form that most closely fits your requirements: <ul style="list-style-type: none"> <li><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</li> <li><u><i>Repair/Maintenance</i></u> – You require repair or maintenance services for an instrument or piece of research or teaching infrastructure</li> <li><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</li> </ul>
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\* 

B I U ... Times New R... 16px ...

Response Required by

Expected Completion Date

Attachments  [SELECT FILE](#)

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.

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 Code 1: Q 34510 2115 50.00 %  Discretionary Q - Batterham

Charge Code 2: R 14000 Enter project id 50.00 %  General Cash Float

[Add more](#)

Special Instructions:

**4** [SUBMIT](#) **5** [SAVE AS DRAFT](#) **6** [PREVIEW](#) **7** [CANCEL](#)

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

Annotation	Label	Description
		<ul style="list-style-type: none"> <li>• <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</li> </ul>
2	Hazards & Hazards Declaration	<p>These are conditional questions where you can provide additional information relating to:</p> <ul style="list-style-type: none"> <li>• Any equipment / parts being supplied as part of the request</li> <li>• Any raw materials being supplied</li> <li>• Site visits</li> <li>• 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.</li> </ul>
3	Lab and Payment / Account Information	<ul style="list-style-type: none"> <li>• <u>Secondary Cores</u> – Select additional facilities if you require your request to be submitted to more than one facility/workshop</li> <li>• <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</li> <li>• <u>Department Name &amp; Research School</u> – This information is related to the GLC Fund Manager</li> <li>• <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.</li> <li>• <u>Phone</u> – provide a contact number if you wish for the technicians to call you</li> <li>• <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</li> <li>• <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 than one Charge Code, ensuring that the total percentages add to 100%.</li> <li>• <u>Special Instructions</u> – Put any instructions relating to payment here.</li> </ul>

Annotation	Label	Description
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"> <li>• <u>Job Title</u> – short description of request (50 characters max)</li> <li>• <u>Description</u> – Provide more detail regarding the request</li> <li>• <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</li> <li>• <u>Attachments</u> – Upload any attachments here. File size limit is 10MB. You can upload more one document.</li> </ul>
2	Lab and Payment / Account Information	<ul style="list-style-type: none"> <li>• <u>Secondary Cores</u> – Select additional facilities if you require you request to be submitted to more than one facility/workshop</li> <li>• <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</li> </ul>

Annotation	Label	Description
		<p>staff role and a PhD role might select the PhD role if they are submitting a request in their capacity as a PhD student</p> <ul style="list-style-type: none"> <li>• <u>Department Name &amp; Research School</u> – This information is related to the GLC Fund Manager</li> <li>• <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.</li> <li>• <u>Phone</u> – provide a contact number if you wish for the technicians to call you</li> <li>• <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</li> <li>• <u>Special Instructions</u> – Put any instructions relating to payment here.</li> </ul>

## 4. Your Requests

### 4.1. Viewing your requests

Your jobs, or jobs that are shared with you can be viewed under My Homepage> My Requests.

The screenshot shows the 'My Requests' page in a web application. The interface includes a navigation bar at the top with 'My Requests' selected. Below the navigation bar, there are tabs for 'My Requests' and 'Shared Requests'. A date range filter is set from '14-11-2018 12:00 AM' to '15-12-2018 12:00 AM'. The main content area is a table with columns: Date, ID, Form Name, Job Title, Summary, Description, Core Facility, Lab Name, Status, and Action(s). Two requests are listed: one for 'Repair seat' and another for 'test'. The 'Status' column shows progress bars and completion percentages (0% and 20%).

Annotation	Label	Description
1	My Requests	Requests that you have submitted or have been submitted for you (e.g. by a workshop technician)
2	My Lab Requests	Requests that are shared with you by someone else
3	Date Filter	Filter requests by searching within a date range
4	Date	Date of submission
5	ID	Unique ID given to each request



Annotation	Label	Description
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	Description	Not Applicable
10	Core Facility	The name of the facility that the request was submitted to
11	Lab Name	We are not currently using this feature and all users are given a 'Default' Lab/Group
12	Status	Current Status of the job. E.g. New, Assigned, In Progress, Completed.
13	Arrow action	Allows user to upload documents directly to the request
14	Delete action	To delete a draft request that has not been submitted to a workshop
15	Reuse action	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 your request

View the request by clicking on ID or Form Name to open the job details card.



Annotation	Label	Description
1	Status Tracker	See the status of your request
2	Details	This tab contains all the information regarding your request
3	Communications	Used by Workshop Technicians, yourself, and anyone who has access to the request to send messages to one another
4	Activity Log	Records all times-stamped activity related to the request
5	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

Job Summary

Sample Submission Id: 90\_560 Submitted Date: 04-12-2018 14:50

Client: Richa Bhal Client Phone No:

Department Name: Service Improvement Group

Research School: Service Improvement Group

Charge Code: Business Improvement Group(-21131-)

Fund Manager: Bhal, Richa

Submitted By: Richa Bhal

Estimated Amount: \$5k-\$10k AUD Actual Fee: 0.00 AUD

Estimated Completion Date:

Lab Group: Default

Special Instructions:

Share To: Select clients [SHARE]

Annotation	Label	Description
1	Estimated Amount	The estimated cost provided by the Technician
2	Actual Fee	The total cost of the request to-date

Annotation	Label	Description
3	Share To	Share the request with other users so that they can also manage the request

### 4.2.1 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 i

Job Description: 

- test

Response Required By: Within 2-3 Days

Required Completion Date:

Attachments:

Related Job ID: i

**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

### 4.2.1 Tasks, Purchases and Amount

Tasks and Status

**Service Items/Supplies and Milestones**

Service Items: No records to display. Link Service Items

Sub Total: 0.00

**Supplies**

Order Id	Item	Location	Price	Quantity per Unit	Quantity in Stock	Quantity	Total
1	Lights	Workshop 1 Bay 2	90.00	1	999	1	90.00
2	Connectors and Cables		89.33	406	457	2	178.76
3	Semiconductor		89.33	1	394	10	504.00
							Sub Total: 772.06

**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	Scope Research	1.00	100.00	
Morgan Rachael	14-11-2018 8:51:53 AM	Risk Assessment	1.00	250.00	

Export to WS Export to XLS Export to JSA

**Change Sample Submission Status**

Current Status: In Progress

**Files**

Uploaded By	Uploaded Date	File Name
No files to display		

Purchase Record And Material

**Purchase**

Order Id	Supplier Name	Description	Part #	Quantity	Unit Cost	UET mL	Total Cost	Comments	Order By	Delivered?
No records to display										

Amount and Discount

Sample Submission Fee: 1272.06 Discount: 0.00 (0 %) Amount: Actual Fee: 1272.06

Back
Home

<b>Annotation</b>	<b>Label</b>	<b>Description</b>
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
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