



User Manual

Quick Reference Guide

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Glossary of Terms

Attachment – Any uploaded document or attachment connected to a job. For example: Job Plans, OHS Procedures, Dial before You Dig Plans, Safe Work Method Statements etc.

Calendar – The Calendar displaying Blocks of time representing the various Jobs Scheduled

Category – *(An advanced feature that may not always be needed by every User)*

Tasks, Work Items, and Materials may be grouped by Category, so that searching the data base is streamlined

Comments – The field where Job Comments may be entered. A very useful tool when using JobStream

Customer – The customer is the client for whom a job is scheduled

Customer List – A list view off all Customers

Device – refers to the iPad, Laptop or Computer working with JobStream

Invoice – The Invoice generated by the System after Job Completion

Job – Any Job entered into the System, and Scheduled on the Calendar

Jobs List – A list view of scheduled Jobs

Job Number – A Job Number generated by the System during the Scheduling process

Materials – Materials that have been entered into the data base, or inserted by the user from a Suppliers Invoice that will be booked out on a Job

Schedule – The time allocated for Jobs in the scheduling stage will arrange Jobs in blocks of time on the Calendar.

Task – A brief description of the Job to be undertaken by the User (E.g. Repair, Inspection, Service Call, Check Leaks etc.)

Time – The Start and Finish Time scheduled for a Job

Time Tracking - The function enabling a User to start the automatic Time Keeping once on the Job

Tool Bars

First Tool Bar – When viewing a Job Detail Screen there are two tool bars at the top of the screen. Referring to the First Toolbar in this manual means the Tool Bar at the TOP of the page

Second Tool Bar - Referring to the Second Toolbar in this manual means the Tool Bar below the First Toolbar

Type – The type of Job. E.g. Do and Charge- Quotation - Quoted Job - Recall

Status – The Status of the Job. New, Quoted, Scheduled, In Progress, On Hold, Complete, Complete and Paid

User – all employees accessing JobStream with an iPad and included on the Calendar are referred to as Users

Work Items – (Advanced Feature) an expanded description of the Task/Work to be carried out on the Job. (E.g. the **Task** is be: *Check Leaks*. The **Work Item** then might be: *Investigate leak under Laundry Sink*)

RHS – Right hand side of the screen

LHS – Left hand side of the screen

PART 1.0

Viewing the Calendar

The Calendar in the **JobStream –Total Workflow Solutions** gives the user an instant snapshot of scheduled jobs for all users including location, Job Number times and dates scheduled. At any time the user may view today's scheduled jobs, job booked in for future dates, or Jobs that have been completed in the past.

By touching the **Calendar** button (top RHS of screen) all jobs scheduled for all users will be displayed on today's calendar. Each job will be represented by a solid block of blanked out time. Within this block is displayed the system generated **Job Number** and the **Suburb** location of the job. The next two working days of the week may be accessed to view the schedule simply by touching one of the other two dates displayed.

By touching a "block" of time on the Calendar, the Customers Home Page details of that particular Scheduled Job will be displayed and allows viewing of the Job Details

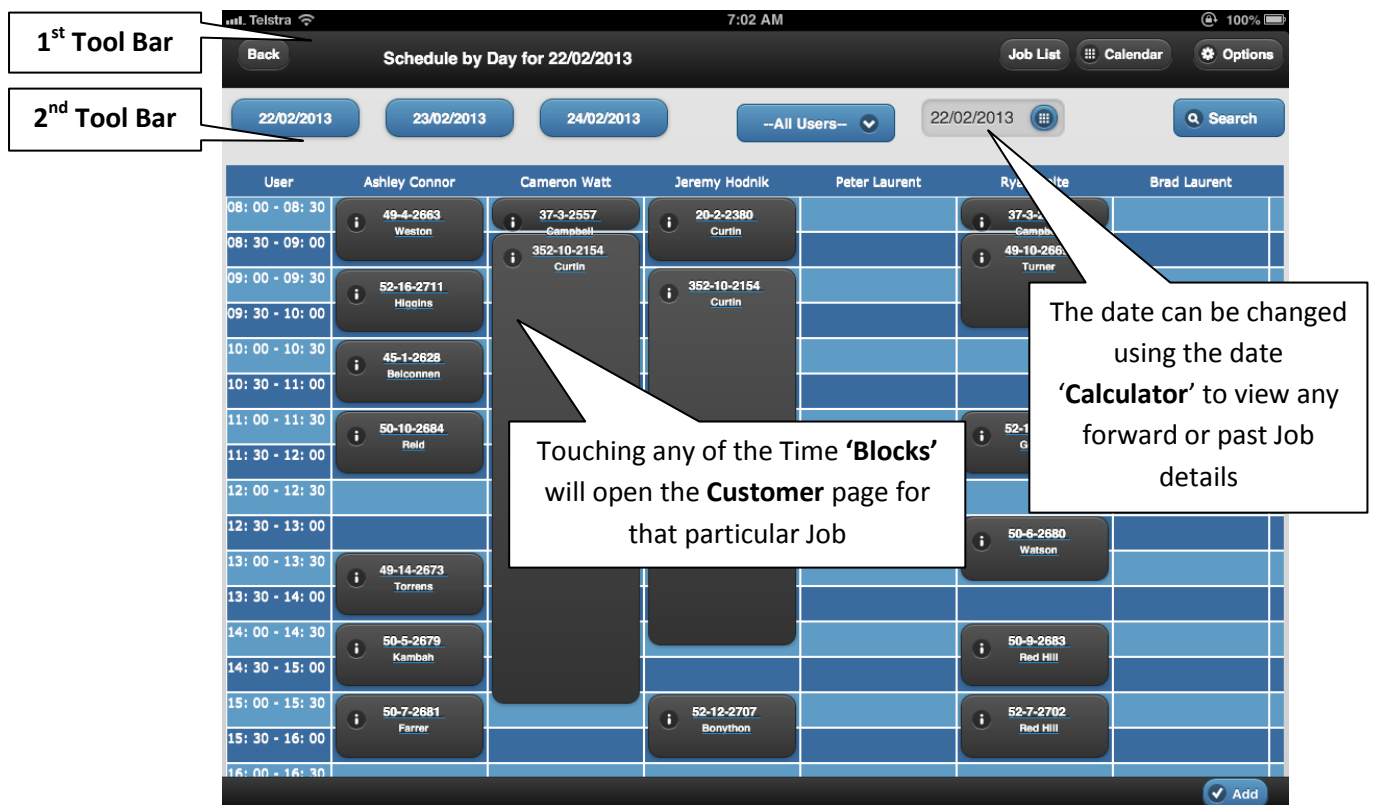


Fig. 1 the Calendar Displaying Scheduled Jobs

All time "blocks" on the Calendar in the above example are coloured Charcoal. This colouring informs the viewer that the jobs displayed have been scheduled, but not yet completed

Part 2.0 Selecting your Job for Today

On arrival at the Job, touch the 'Block' of time on the Calendar (**Fig. 1**) representing that particular job today, the Job Number and Customer Details page (**Fig. 2**) will open as shown below:

Once you have opened the **Customer** screen, and you are ready to commence the Job, touch the **Time** Button to commence **Automatic Time Tracking**

It's a good idea to use the **Comments** field as much as possible. It can give the **User** a full picture of what needs to be done on the Job

The screenshot shows the 'Job Details' screen for Job 54-1-2721. The top bar includes 'Back', 'Job Details', and 'Job List'. The main header displays 'Job 54-1-2721 : Workforce on tap : Job Details - User: Keiran Laurent'. Below this is a tab bar with 'Schedule', 'Task', 'Attachment', 'Work Items', 'Materials', 'Time', and 'Invoice'. The 'Time' tab is selected. The form contains fields for Customer (Workforce on tap), Contact Name, Phone (0438162382), Email (k.laurent@bigpond.com), Status (New), and Comments. There are also buttons for 'Change', 'ACT', 'Quotation', and 'Keiran Laurent'. At the bottom are 'Cancel' and 'Save' buttons.

Fig. 2

1. When all is in readiness to start the Job, touch **Time**, and the following screen will appear (**Fig. 3**):

To start automatic time tracking, touch **Start Time Tracking**

The screenshot shows the 'Times Worked List' screen for Job 52-2-2697. The top bar includes 'Back', 'Job Details', and 'Job List'. The main header displays 'Job 52-2-2697 : Workforce on tap : Times Worked List - User: Keiran Laurent'. Below this is a tab bar with 'Schedule', 'Task', 'Attachment', 'Work Items', 'Materials', 'Time', and 'Invoice'. The 'Time' tab is selected. A 'Start Time Tracking' button is visible. Below it is a table with the following data:

Date	Hours : Minutes	Workers	Rate	Sub Total
21/02/2013	0 : 20	Peter Laurent	90.00	45.00

Fig. 3

2. Now touch **Start Time Tracking**, and automatic time tracking will commence

IMPORTANT NOTE: It is not necessary to Stop Time Tracking until **ALL** aspects of the Job have been completed

3. To add Materials to the Job and start building the invoice, Touch **Materials**, and the following screen appears (**Fig 4**):

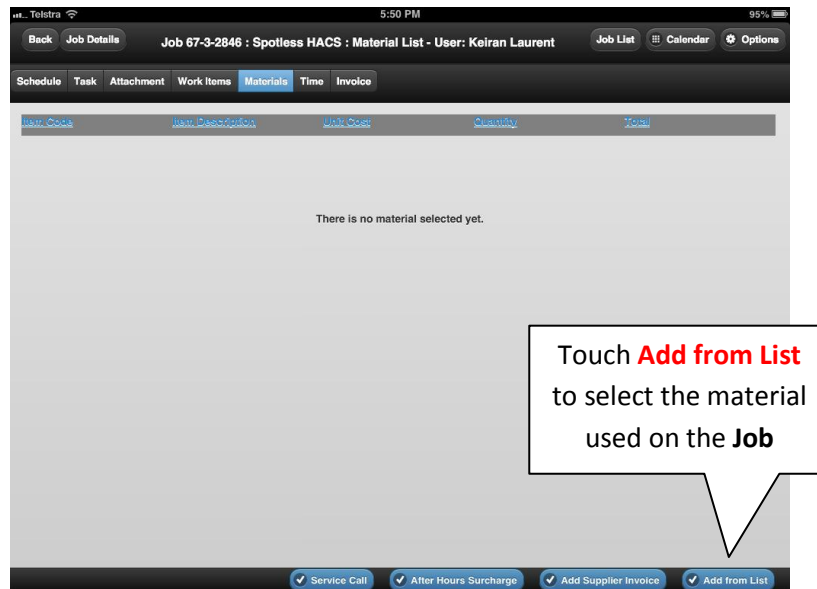


Fig. 4

4. Touch **Add from List** (**Fig. 4**), and then touch the **All Category** button, and from the drop down menu select the relevant Category for the materials

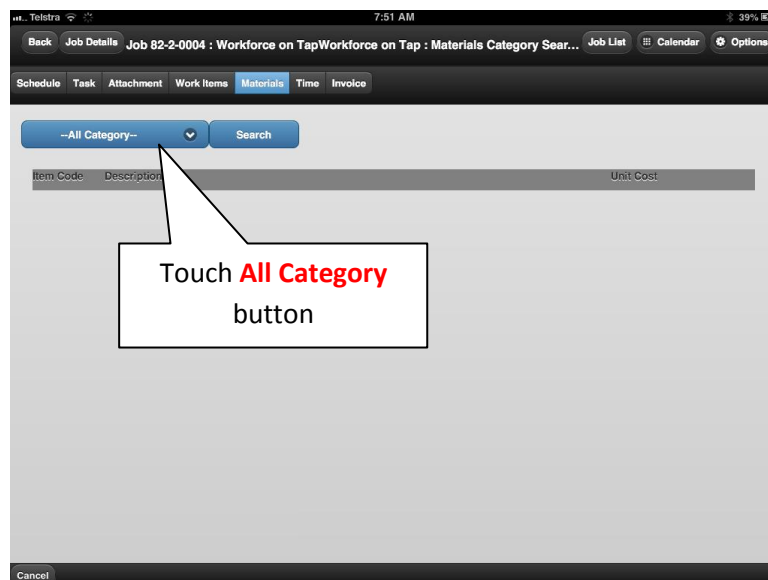


Fig. 4a

5. Once you have selected the desired **Category** from the drop down menu, then touch **Search** to find the Material to be added to the Invoice

6. Touch the Material to be selected, then you will be prompted to enter a quantity for that item on the following page (**Fig. 5**), once you have entered the quantity, then touch **Save**

Category: Item Service Charges
Code: M1C002
Description: Service Call
Cost: 60.00
Quantity: 0

Enter Quantity

After you enter the Quantity of Materials touch **Save**

Cancel Remove Save

Fig. 5

7. Enter the Quantity, then touch **Save**
8. The following page (**Fig. 6**) will appear and this is the beginning of the list of service charges, materials and work items that the system will use to build the invoice

Item Code	Item Description	Unit Cost	Quantity	Total
M1C002	Service Call	\$ 60.00	1	\$ 60.00

Touch **Add from List** each time a new Material is added to the job, touching **Save** after every entry

Service Call After Hours Surcharge Add Supplier Invoice Add from List

Fig. 6

9. Continue to touch **Add From List** to select next the items for the invoice. Continue adding from the **Materials List**, until all items that need to be invoiced have been included
10. Once all Materials have been added to the Job, and **ALL WORK HAS FINISHED**, touch Stop Time Tracking

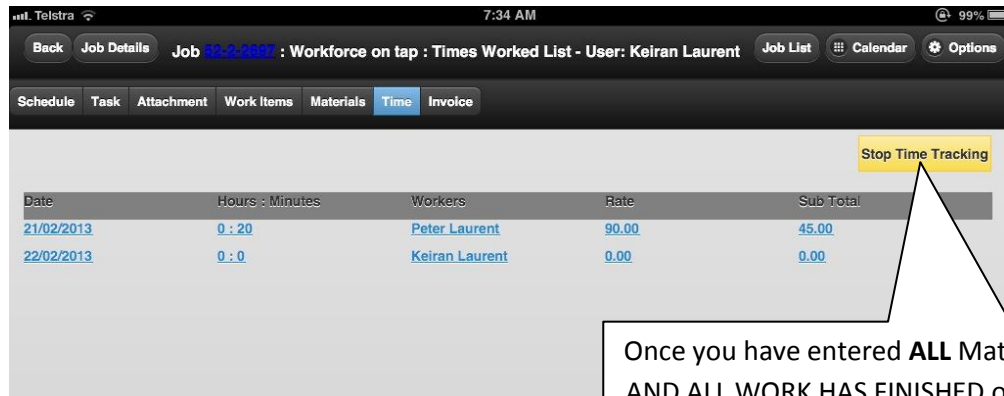


Fig. 7

IMPORTANT NOTE: Even though all materials may have been added to the Job, **DO NOT** touch **Stop Time Tracking** until **ALL WORK HAS FINISHED**

11. At this point a touch **Job Details** at top RHS of the screen (Fig. 8), to return to the Customer Job Screen (Fig. 9)

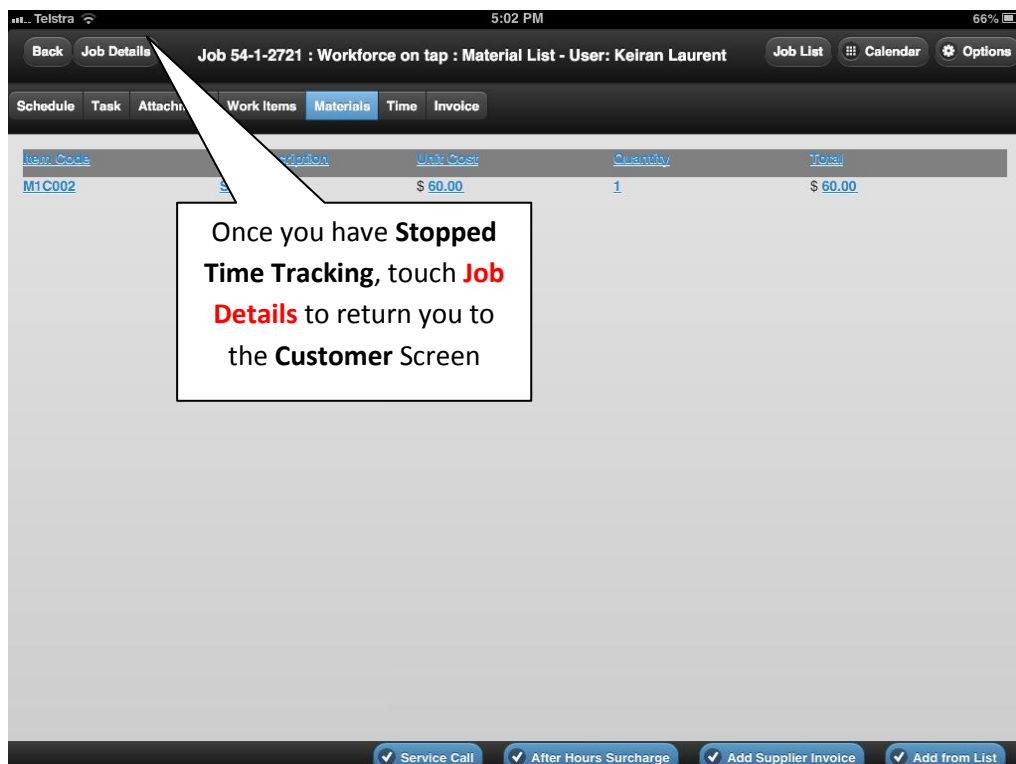


Fig. 8

12. On returning to the Customer Screen, touch the BLUE Status Bar (**Fig. 9**), and from the drop down menu, select Complete, then touch Save.
13. The Job is now COMPLETE and an Invoice has been generated by the system.

The screenshot shows the 'Job Details' screen for 'Job 34-1-2721 : Workforce on tap'. The user is 'Kelran Laurent'. The screen has tabs for 'Schedule', 'Task', 'Attachment', 'Work Items', 'Materials', 'Time', and 'Invoice'. The 'Status' dropdown menu is highlighted with a callout box.

Customer: Workforce on tap **Change**

Tenant: Workforce on tap

Site: 21 Broughton Cirt

Suburb: Murrumbateman

State: ACT

Postcode: 2582

Type: Quotation

Assigned To: Kelran Laurent

Contact Name:

Phone: 0438162382

Email: k.laurent@bigpond.com

Status: New

Comments:

Once you've returned to the **Customer Page**, touch the **BLUE Status** bar, and from the drop down menu, select **Complete**, then touch **Save**

Cancel Save

Fig. 9

PART 3.0 Emailing the Invoice to the Customer

1. Now that the **Job** has been completed, all that's left is to email the **Invoice** to the **Customer**. From the Customer Information page, open the invoice. Check that all materials and Time that need to be charged out are listed.

Customer: Spotless HACs [Change](#) Contact Name: Mrs Samundsett
Tenant: Mrs Samundsett Phone: 0401693504
Site: 11/112 Lambrigg Street
Suburb: Farrer
State: ACT
Postcode: 2607
Type: Spotless
Assigned To: Ashley Connor

Cancel Save

2. At the bottom LHS of the invoice screen, touch **Send**

Customer: Janice Laurent
Contact No: Janice
Address: 21 Broughton Circuit Murrumbateman Email: janice.laurent@bigpond.com Select GL Code: 41000
Site Address: 21 Broughton Circuit

	Value	Rate per Hour	Sub-Total	GST-10%	Total Inc GST
Total Time	0.45	95.00	\$ 166.25	\$ 16.63	\$ 182.88
Total Materials	-	0.00	\$ 285.00	\$ 28.50	\$ 313.50
Grand Total				\$ 451.25	\$ 496.375

Invoice Comments :

Item Code	Item Description	Unit Cost	Quantity	Total
TRAV 001	TRAVEL CHARGE			\$ 95.00
TRUCK 001	TRUCK HIRE PER HOUR			\$ 190.00

Date	Hours : Minutes	Workers
27/03/2013	0 : 33	1
27/03/2013	0 : 0	1

Cancel Complete Send

PART 4.0 Viewing the Calendar of Completed Jobs

Once you have Selected **Complete** from the drop down menu on the **Customer Job Screen**, when you return to the **Calendar** (Fig. 10), (touch Calendar top RHS of **Job Details** screen), you will see that the 'Block' of time, for this Job will have turned **RED**. This signifies that the **Job** has been **Completed** and an Invoice generated by the system, as shown below:

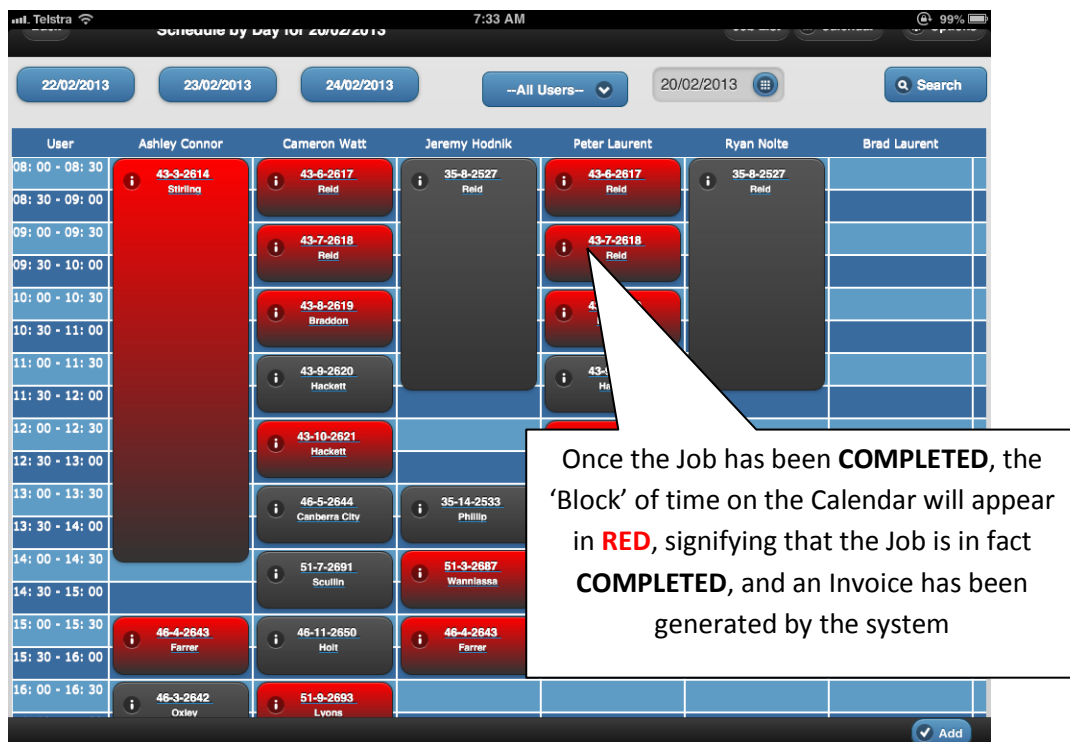
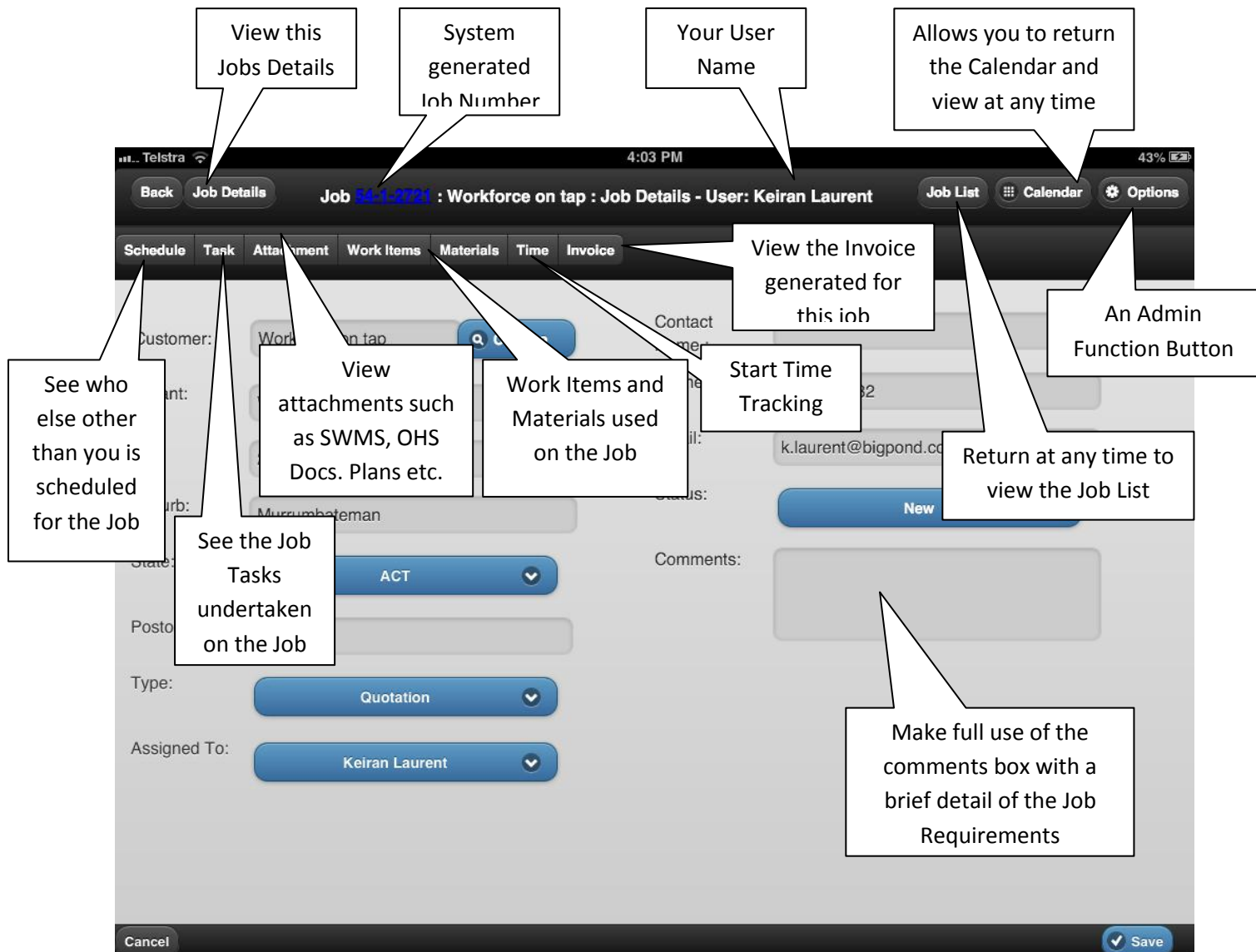


Fig.10

PART 5.0 Function Buttons – on the Customer Home page



PART 6.0 Function Buttons – Detailed Description

The second tool bar displays the following buttons on the **Jobs Details** page

- **Schedule** – Touching the **Schedule** button opens the screen displaying the user/s who've been assigned to the JOB
- **Task** – Touching the **Task** button opens the Task screen where tasks relevant to the job can be selected from the drop down menu accessed by touching the **All Category** field and making a selection from the list
- **Attachment** – Touching the **Attachment** button opens the screen displaying any attachments pertinent to the individual job such as: site plans; dial before you dig plans; official Customer Job Order etc. These attachments are added by the System Administrator. An attachment can be opened simply by touching the desired Attachment
- **Work Items** – Touching the **Work Items** button opens the screen displaying a further, more detailed description of actual tasks carried out on the job. Again, by touching the **All Category** button on this page will display a list of Work Items which may be selected
- **Materials** – Touching the **Materials** button opens the screen displaying materials used on a job. This screen also displays the material Item Code, the Material Item Description and the price of the item.
This screen also allows the user to select such items as Service Call Charges, After Hours Surcharge, and the ability to select materials form a hard copy of a Suppliers Invoice. (These buttons are located at the bottom of the Materials page)
- **Time** – Touching the **Time** button allows the commencement of the automatic time keeping feature by touching the **Start Time Tracking** button, immediately the user arrives at the job. Time keeping will stop by touching the **Stop Time Tracking** button. This is usually done when all work and data entries have been completed, and the job is considered finished.
- **Invoice** – Touching the **Invoice** button will display a copy of the Invoice that has been generated by the System, reflecting all chargeable Time and Materials consumed by the Jobe
- **Tasks** – touching the **Tasks** button allows entry for a description of the task to be undertaken
- **Work Items** – touching the **Work Items** (may best be described as a subset of the Tasks button) allows a more specific detail of the Job to be entered(e.g. a specific task at a specific location on the job)
- **GL List** – touching the **GL List** button allows Job Codes to be added to differentiate between Job Types
- **Procedures** – touching the **Procedures** button allows to upload a Procedure for later attachment to any Job
- **Users** – touching the **Users** button allows the adding of Users (employees using the various iPads) to the System.
- **Reports** – touching the **Reports** button opens
- **Device** – touching the **Device** button allows pairing of a device (iPad or computer) to the System