JobStream
Total Workflow Solutions

Admin User Manual

Index

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 – W**hen viewing a Job Detail Screen there are two tool bars at the top of the screen. Referring to the First Toolbar in this manual *<u>means the Tool Bar at the TOP of the page</u>*
>
> **Second Tool Bar -** Referring to the Second Toolbar in this manual *<u>means the Tool Bar below the First Toolbar</u>*

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

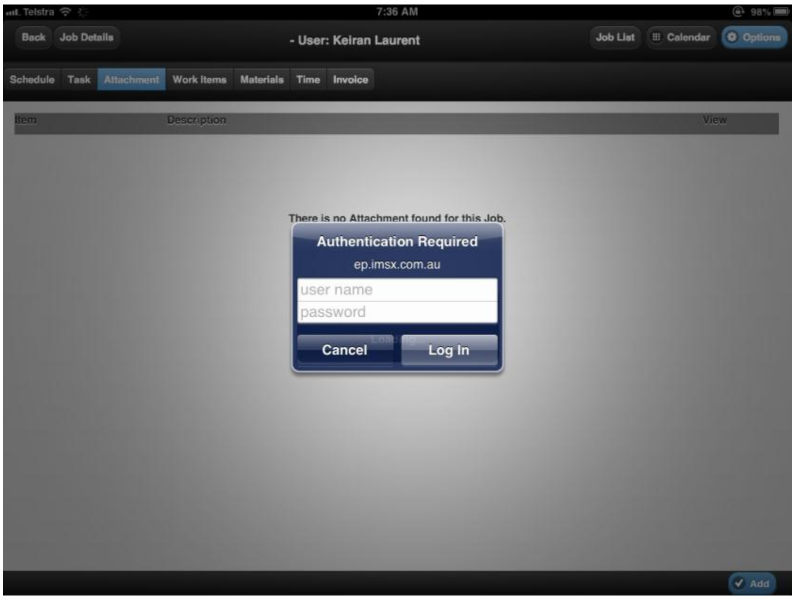
LHS – Left hand side of the screen

PART 1.0 The Admin Site - Getting Started

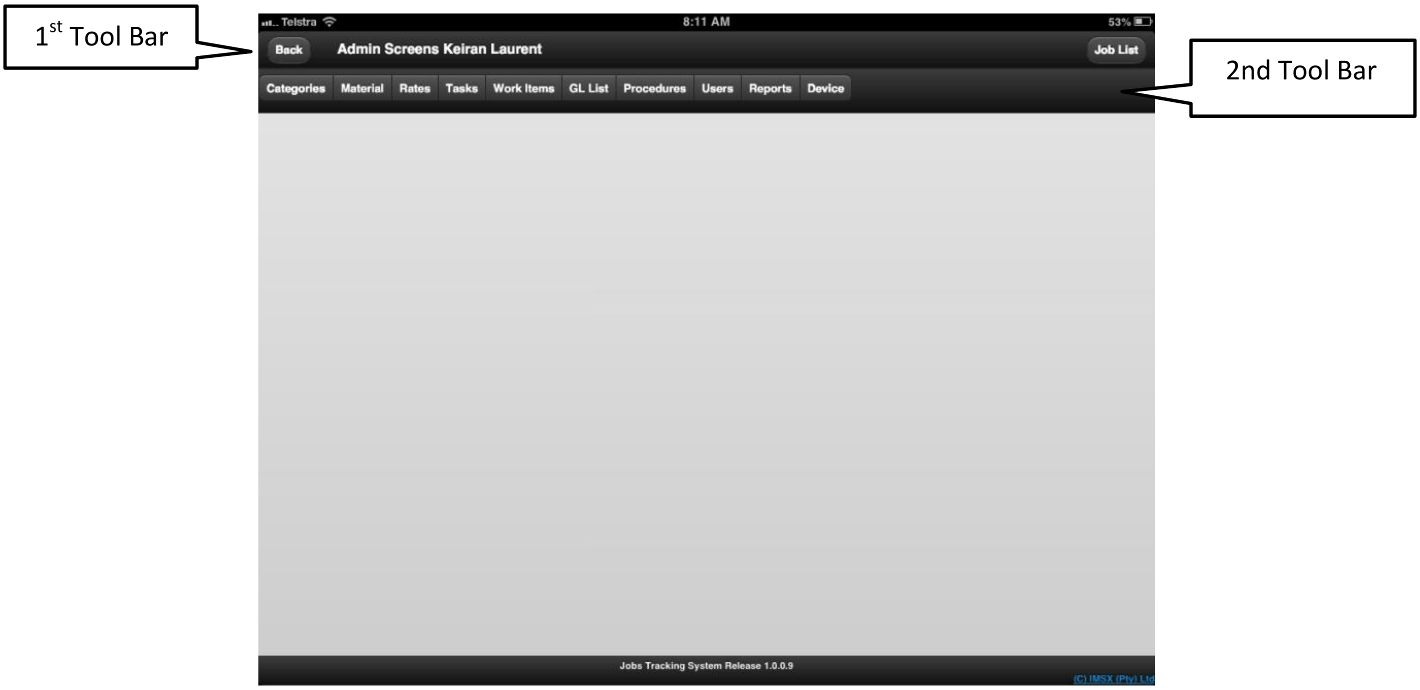
So as to immediately start using JobStream it will be necessary to first **launch the Admin Site**

1 On the **Main Menu** Page touch Launch Admin Site

2 Touch the **Options** button or **Launch Admin Site** , and the following screen appears:



3 In the **Authentication Required** Box enter the User Name and Password, and then touch **Log In.** The following screen then appears. You are now in the **Admin Site** where you can start building the Data Bases for the system very quickly and with relative ease!

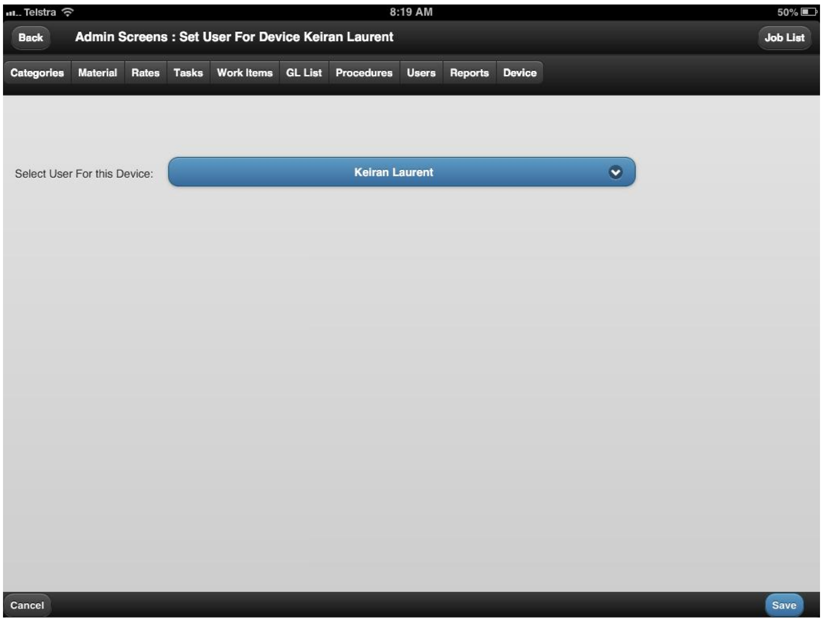


PART 1.1 Selecting a User for a Device

Once the Admin Screen has been accessed, the iPad that's being used will need to be identified for the System, so a **User** needs to be nominated to use this **Device**

Each time this device logs onto JobStream, the system will recognise the device as the **USER.** Therefore each different iPad will identified by a different **USER**

1. On the second tool bar of the Admin Screen touch **Device**, the following screen will appear
2. Now touch the **blue box** marked '**Select User for this Device'**, and from the drop down list that appears, select the **User** who will be using this device
3. Touch **Save** at the bottom RHS of the screen



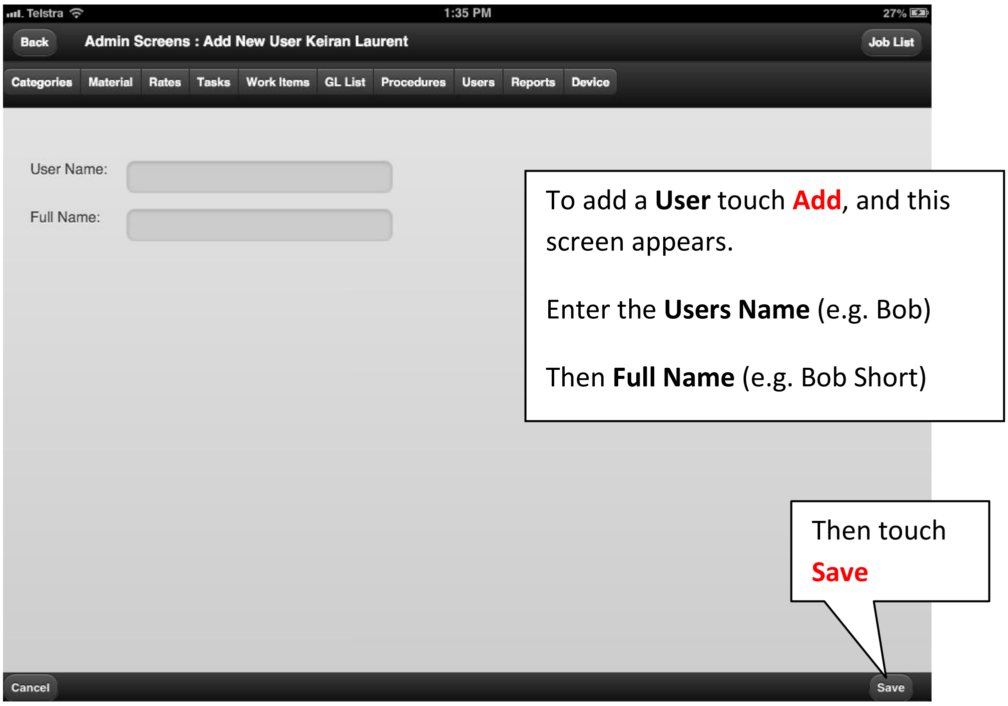
In the above example, the **User** for the **Device** is Keiran Laurent, and each time this iPad logs on to JobStream, it recognises Keiran Laurent

Once a **User** has been **Selected** for the **device**, commencement of building the various data bases can begin

<u>PART 1.2</u> Adding a User

Users quite simply, are the people who will be using JobStream in their daily routine. They will generally be accessing the System with an iPad

1. Touch **Users** on the Second Tool Bar, then touch **Add**



2. Now continue entering all **Users** by repeating the process, remembering to touch **Save** after each entry
3. Once all users have been entered into this data base, they can now be nominated as Device Users, for their individual iPad or computer

<u>Important Note:</u>

A **User** can be selected for <u>more than one</u> **Device**. For Example: Bob Green may be go using an iPad in the field, but also use his office computer when back at base. In this example Bob can be selected as the User on his iPad, and also his office computer

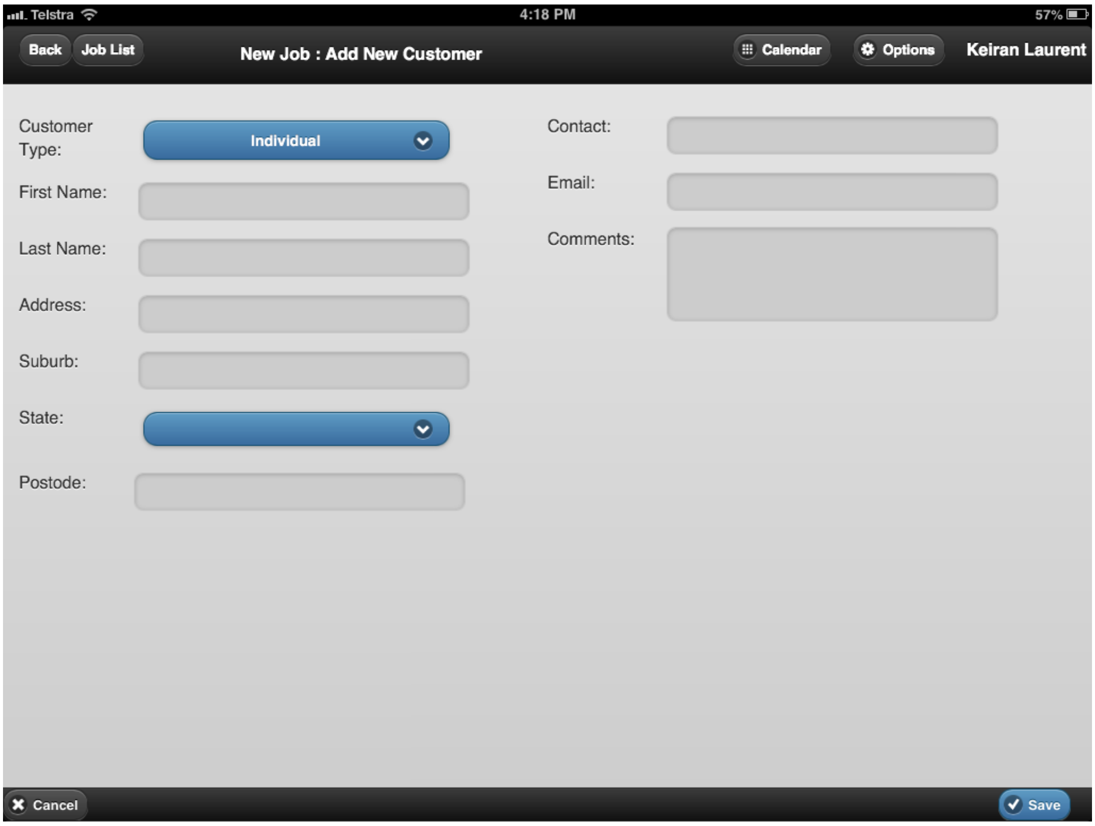
But only one User can be selected for each device

You have now started building your Data Base

<u>PART 1.3</u> Adding a New Customer to the Data Base

To add a New Customer the user needs to be on the Jobs List page. So on the Admin Page simply touch **Jobs List.** (This can also be done from the Main Menu Page)

1. On the Jobs List Page, touch the **Add Button**, bottom RHS of page
2. The Add New Job page appears. Touch the **Search** button beside the **Customer** field
3. The **Searching for Existing Customer** page appears. Touch the **Add** button once again
4. The **New Job: Add New Customer** Page appears
5. Touch Customer Type (**BLUE BOX**)and from the drop down menu select **Company** or **Individual**
6. Now simply fill in all required fields using the screen keyboard, and ensuring the email address is accurate. (This will enable the emailing of an invoice later as soon as the job is completed)



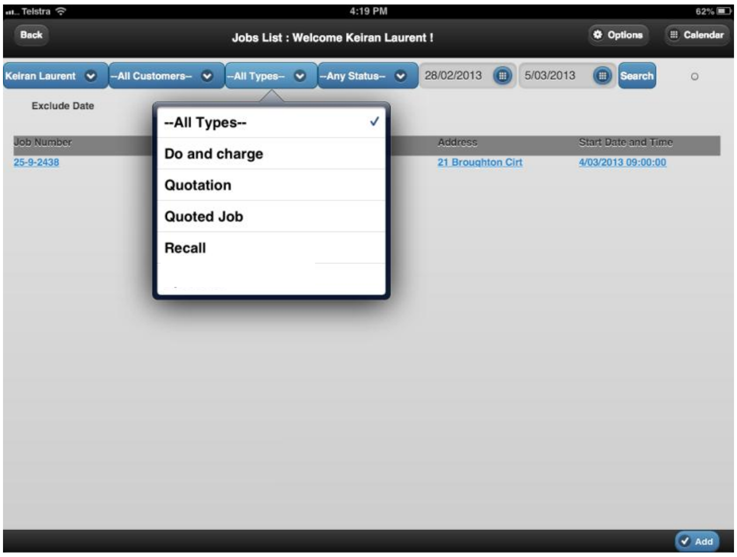
New Job: Add New Customer page

Continue to add Customers following the above process; remember to touch **Save** after each Customer entry

PART 1.4 Type of Job

JobStream allows the **User** to differentiate between Jobs to be scheduled.

On the Jobs List Page on the second tool bar, the third button from the LHS of page is titled All Types, by touching this button the following page appears:

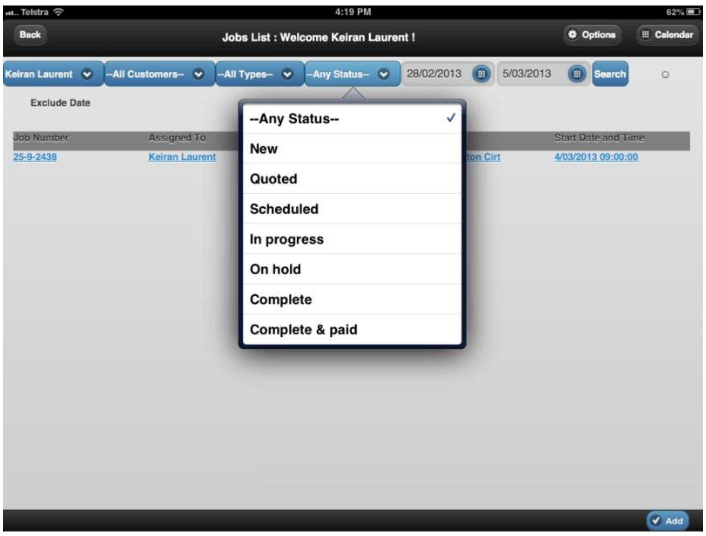


This Feature of JobStream allows the User to classify the type of Job when scheduling Jobs. The titles are self-explanatory. The Type classification will be used when adding or scheduling a Job into the system

PART 1.5 Status of the Job

By touching the **Any Status** button the following drop down menu appears:

Likewise the status of the Job is important. When viewing a list of Jobs, this feature allows the User to View ALL jobs, or just Jobs that meet the criteria of the drop down menu. This feature allows the user to follow-up quotes, to see why a job is not yet completed, etc.



Again the Status titles are self-explanatory, and this feature helps when classifying jobs and maybe setting priority levels etc.

Part 2.0 Viewing the Calendar

This section jumps little ahead, but provides some idea of what **JobStream** offers in way of a visual tool once Jobs have been scheduled.

The Calendar in the **JobStream –Total Workflow Solutions** package is in itself a powerful visual aid that gives the user an instant snapshot of scheduled jobs for all users including location, Job Number and times scheduled. At any time the user may view today's scheduled jobs, and at any date in the future or any Job that has 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 are displayed again and allows viewing of the Job Details with the Function Buttons as in Part 1.3

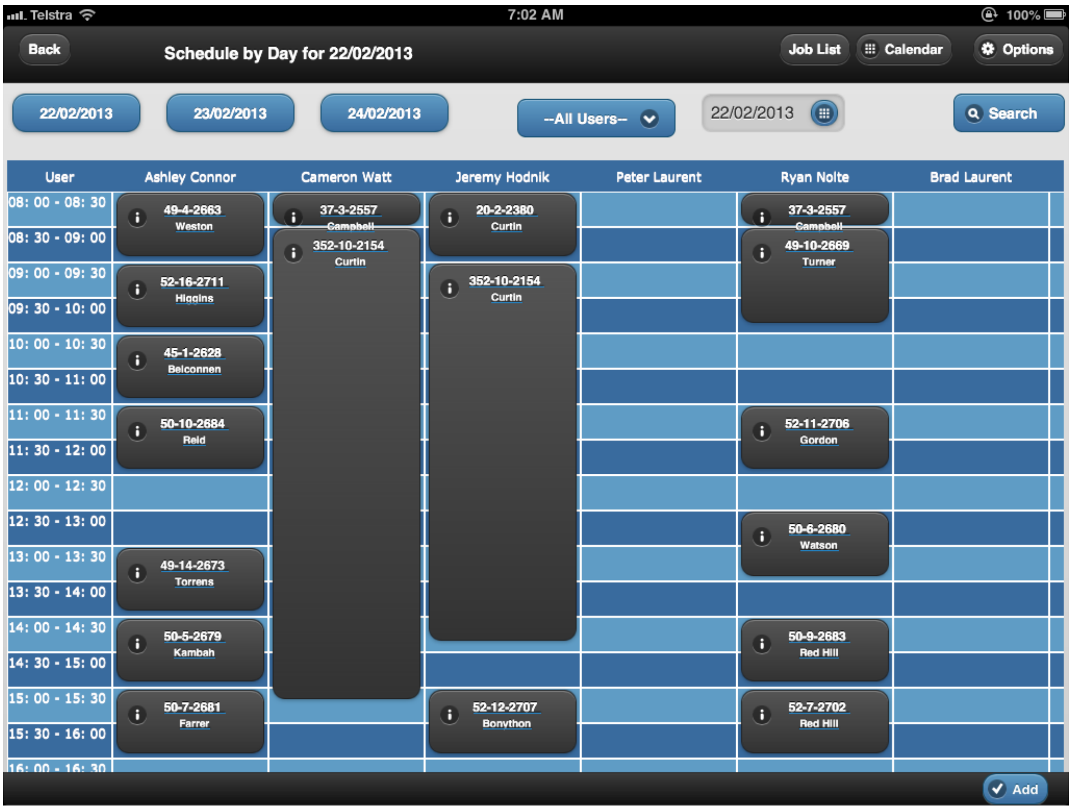


Fig. 4 The Calendar Displaying Scheduled Jobs

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

Part 2.1 Viewing the Calendar – Jobs Completed

The Calendar below (Fig. 5) shows Jobs displayed in Red

A Job displaying in Red indicates that ALL aspects of the Job have been completed, and an Invoice generated by the System

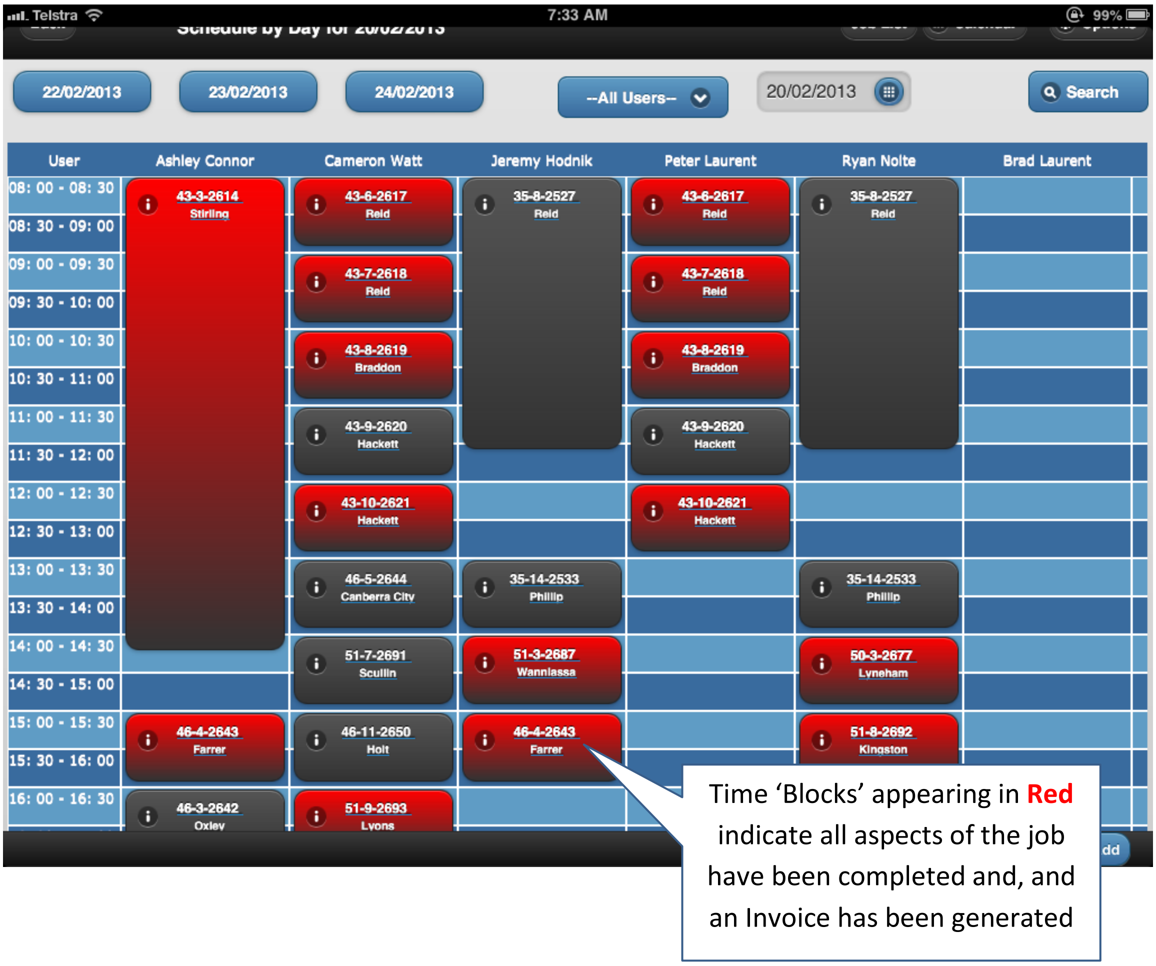


Fig. 5 Screen Displaying Completed Jobs

Part 2.2 Viewing the Calendar - Post or Predate

The Calendar can be viewed for the purpose of checking past Job Schedules or future dates for arranging schedules. This is done by simply touching the Calculator logo in displayed date field.

Simply scroll forward by Month and then select the day by date, or scroll backwards by month by and also selecting the day by date (Fig. 6)

The (-) button allows the user to scroll backwards through previous months and years to view jobs history

The (+) button allows the user to scroll forwards to schedule jobs in advance, and also to check user availibility

Fig. 6 Calendar - Showing the Date Calculator

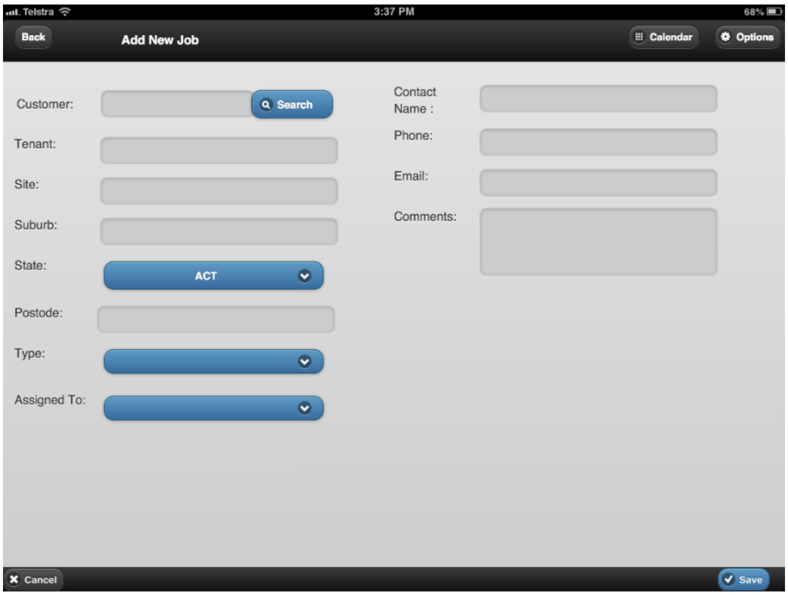
PART 3.0 Adding a New Job to the Calendar

Important Note:

To add a new Job to the Calendar, the Customer will need to have been created in the customer data base, and the User doing the Job, will need to have been selected as the User of a Device

Scheduling/Adding a New Job to the **Calendar**.

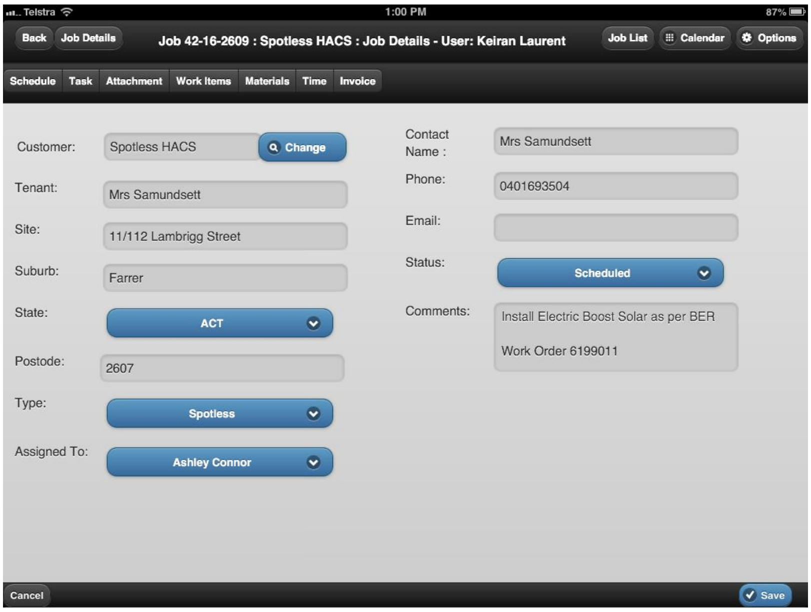
1. Touch **Calendar** button (top RHS of screen) to open and select the desired date (todays date will be currently on display)
2. From the bottom of the Calendar page touch **Add**
3. On the Add New Job Page touch **Search**



4. On the Search **Existing Customer** page touch Search. A list of Customers will be displayed touch **Select** (LHS of page) adjacent to the desired **Customer** on the customer list. The customer will now be displayed on the Add New Job Page

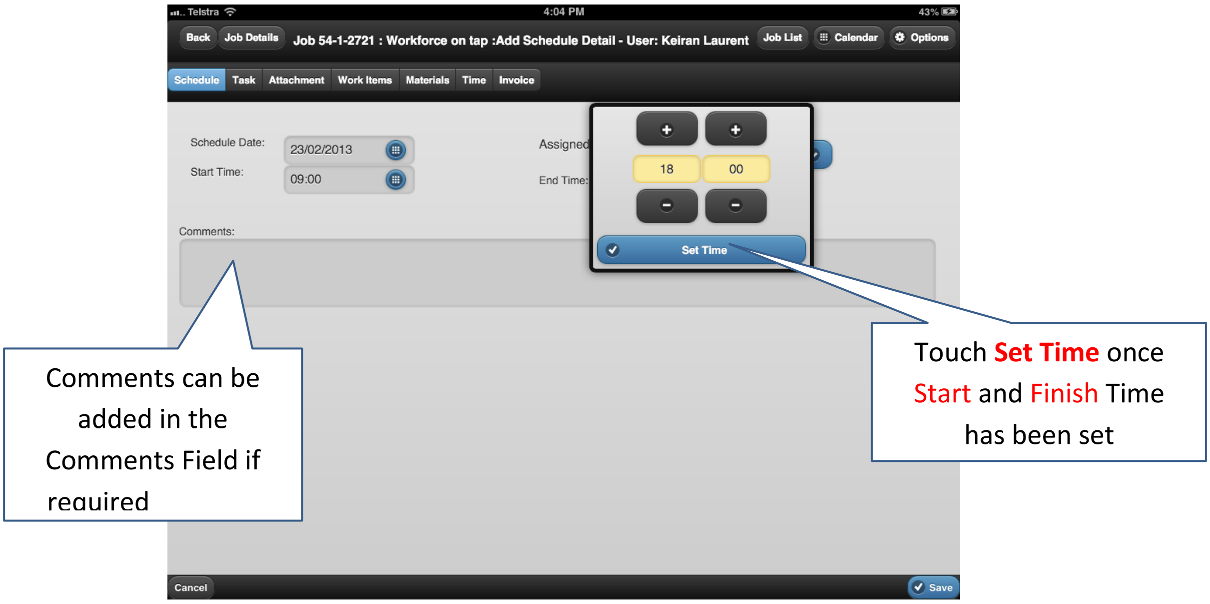
a) Select the type of job from the **Type:** **field** popup menu
b) Select a user for the **Assigned To** **field** popup menu
c) Add comments to the Comments field if required
d) NOW touch the **Save** button

Following these steps, at the top of the displayed page a **Job Number** has now been created along with the **Customer's Name** and the name of the **User** assigned to the job.



From the <u>second tool bar</u> on this page touch the **Schedule** button, then:

1. Reconfirm the user in the **Assigned To: field** <u>popup menu</u>, and this point ensure that the **Schedule Date** is correct by setting with system Date Calculator
2. Touch the **Add** button
3. Reconfirm the user in the Assigned to field by touching **Select**



4. Set **Start Time** and **End Time** by touching the calculator buttons and selecting the desired times. Touch **Set Time** on both calculators
5. Comments can be added in the Comments field if required
6. Touch **Save**

The Job will now appear in list view displaying the scheduled date, start and end times. Touching the Calendar button returns to the Calendar, the job now appears as a *'Block of Time'* coinciding with the scheduled time settings in the nominated user's column.

This job can now be accessed at any time from the Calendar simply by touching the “block of time” on the Calendar

Important Notes:

It is necessary that when creating a new Job, in the User must be continually re-confirmed, because it is possible to ‘invite’ other users to join a job at any time.

The Comments Field

The Comments field should not be underestimated as a useful tool when using JobStream. The comments entered into this field are referred to by the **Users** when a Job order has been scheduled prepared by someone else. Also when viewing historical jobs (jobs completed previously) the comments can be used to refresh memory in the event of a customer inquiry etc.

PART 3.1 Viewing Details of Jobs Scheduled for individual Users

1. Touch **All Users** and select a single User from the drop down menu, then touch **Search**
2. All jobs now displayed for the week, are now only for the selected user (**See Fig. 2**). All aspects of the job can be now viewed by navigating through the job with the use of the Function Buttons displayed on the second tool bar (see part 1.2)

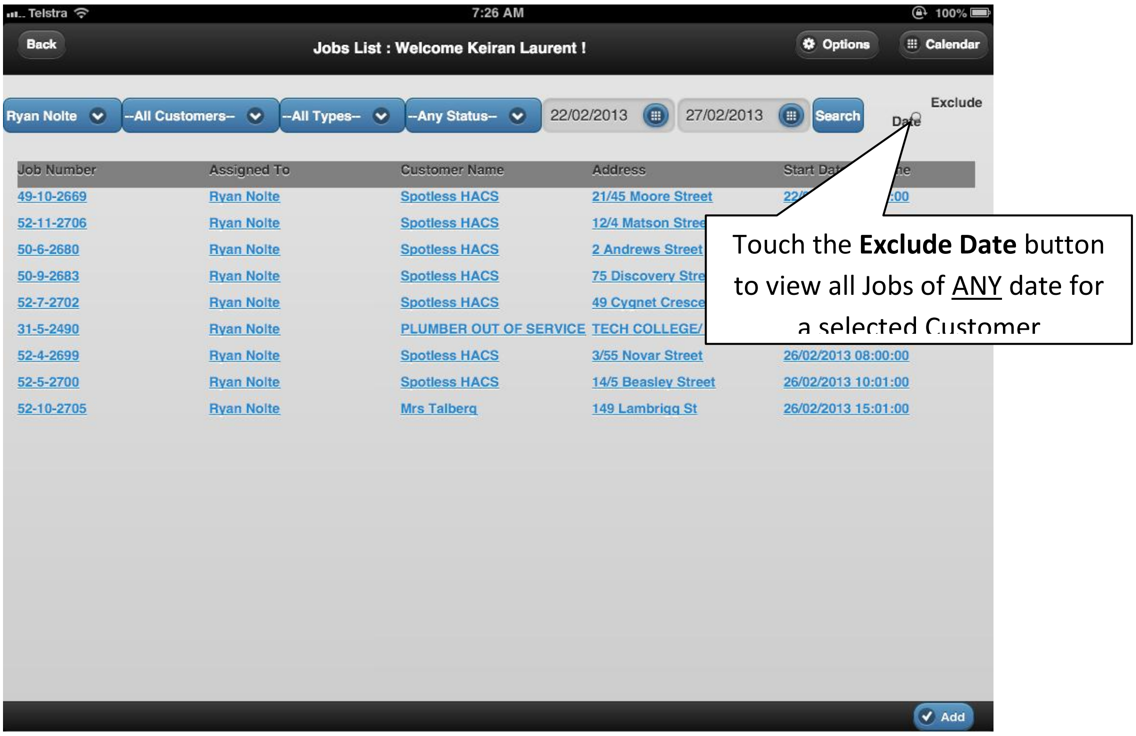


Fig. 2 Job List Displayed for individual User for the same period

PART 3.2 Viewing Jobs Scheduled for individual Customers

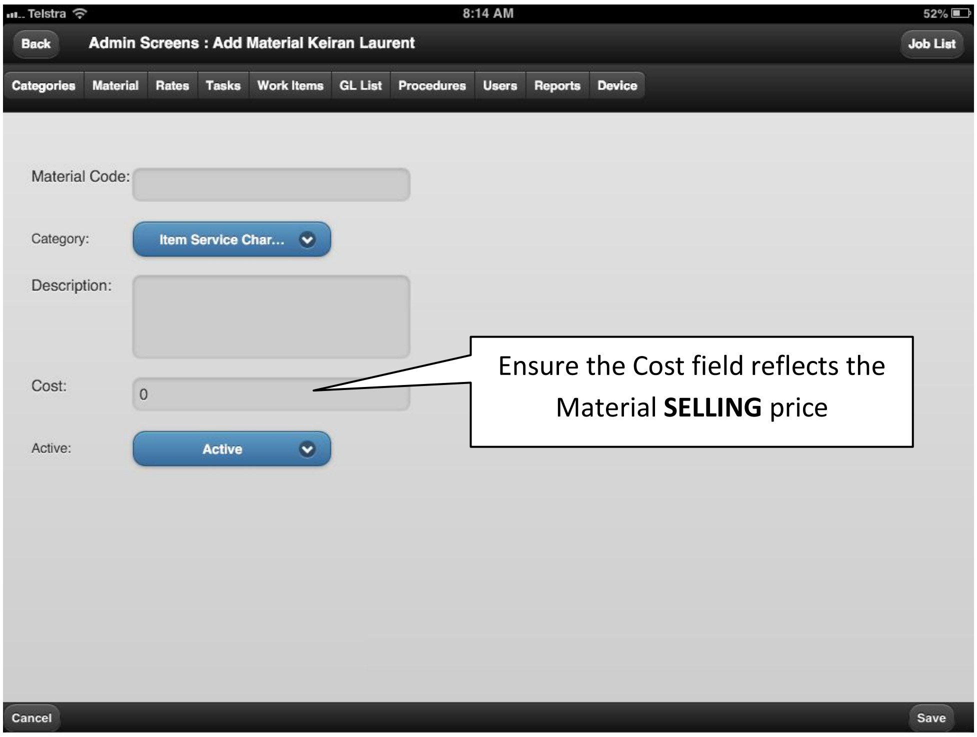
1. Touch **Customer** and select a customer from the drop down menu, then touch **Search**
2. All jobs now displayed are now only those that have been scheduled for the selected customer
3. Generally the date of the job would need to be known when jobs for selecting specific customers. However, to view ALL jobs that have been carried out for a particular client, select the **Customer** from the drop down menu, then touch the **Exclude Date** button on the top RHS of the Jobs List Screen. Then touch Search. Now all jobs ever undertaken, or jobs completed for a particular.
4. This feature is handy to quickly view a jobs history for a client at a single glance. Jobs undertaken for a Real Estate Agent for example where multiple addresses might be the case.

<u>PART 4.0</u> Adding Materials to the Data Base

In the Admin Screen Materials can be added to the data base.

1. On the second tool bar of the Admin Screen touch **Materials**
2. At the bottom RHS of the Material List screen touch **Add**

The following Screen will appear:



3. In the **Material Code** field type in the code for the material item. The code may be a Supplier Code from an invoice, or the **Users** own internal coding system
4. Next, touch **Item Service Char…** , and from the drop down menu select the relevant Item Service Charge
5. Next, in the **Description** field, type a brief description of the Material Item
6. Next, in the **Cost** field, enter the **<u>SELLING</u>** cost of the Material item
7. The Active button is an advanced feature of JobStream where a Material item may be nominated either **Active** or **Inactive**, for usage purposes. When entering new materials to the data base for the first time, ensure **Active** is selected
8. Now touch **Save**

Repeat this process for all items to entered into the data base

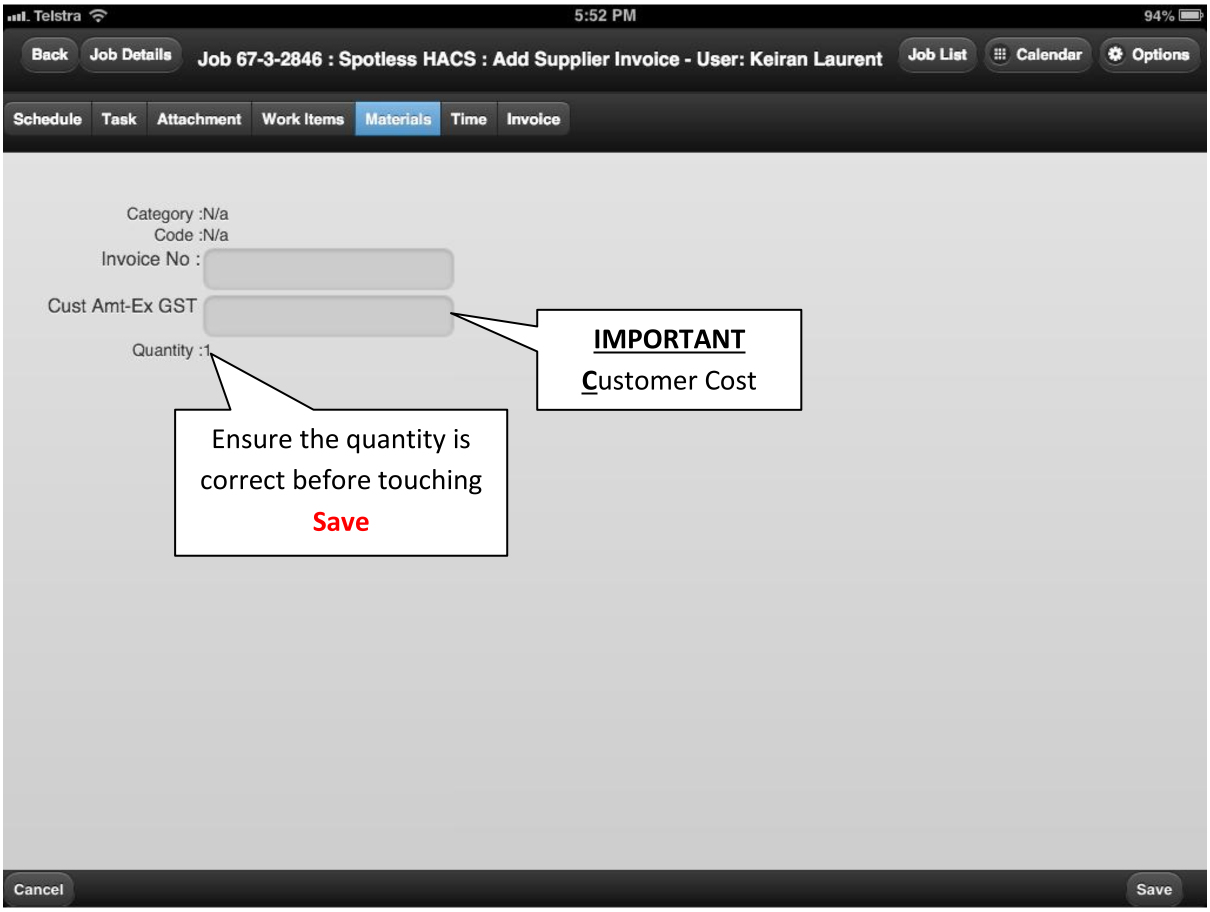
PART 4.1 Adding Materials to the Job - from a Supplier Invoice

The flexibility of JobStream allows **Materials** to be added to the data base at any time. One advantage of JobStream is that Materials can be added to the data base directly from a suppliers invoice

On occasions a User may purchase material/s specifically for a client job, that supplier invoice can be used to add the materials as the **User** is building the Invoice.

When viewing the Job details page:

1. Touch **Materials** on the second tool bar
2. Then touch **Add Supplier Invoice** bottom RHS of screen
3. The following screen appears and allows the user to enter the Supplier Invoice Number
4. Enter cost of material in the Cust Amt-Ex GST field. **IMPORTANT:** the material cost must reflect the cost to the **Customer**
5. Finally, indicate the number of items by changing the **Quantity** field
6. Then touch **Save**



<u>PART 4.2</u> Category – Materials, (an Advanced Feature)

Why Set up Categories?

Materials, Tasks and Work Items can be designated a **Category** code.

The following examples illustrate the why a Category for <u>**Materials, Tasks and Work Items**</u> might be helpful when establishing your data base, so that the System links the Task, Work Item and Materials with a common Category Code.

	<u>BUILDER</u>		
<u>Example 1</u> -	Assume the **Category** is:	**Doors**	Category **DOORS**
	The **Task** might be:	Hang Door	
	The **Work Item** might be:	Decorative Front Door	
	The **Materials** might be:	Hardy's Colonial Entrance Door	

	<u>PLUMBER</u>		
<u>Example 2</u>-	Assume the **Category** is:	**Cisterns**	Category **CISTERNS**
	The **Task** might be:	Repair Cistern in Main Bathroom	
	The **Work Item** might be:	Repair leaking inlet	
	The **Materials** might be:	Fluid Master Side Inlet Valve	

So, searching for a **Task, Work Item** or **Materials** is much easier when the aforementioned headings have been linked to a **Category**, as the user does not have to search the <u>ENTIRE database</u> for materials.

<u>For example</u>:

When the builder searches for the actual door in his **Materials** database under the Category – **DOORS,** there might only be six or seven doors in his list. So searching for the door and adding it to the Job, is quick and simple! The same applies as he searches for his Task, Work Item and Materials under the **DOORS** Category

Setting up Categories is not an essential requirement of establishing the data base. However in the event that a **Materials** data base might become very large over a period of time, an early decision to employ a **Category** classification system for **Materials**, **Tasks** and **Work Items** may assist **Users** at a later date. (JobStream Help will be pleased to assist with this feature)

<u>PART 5.0</u> 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

PART 5.1 Function Buttons – on the Customer Home page