SWANSEA UNIVERSITY

MENG COMPUTING

CSM14 - INDIVIDUAL PROJECT

Glimpse Web - User Manual

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2.1 Creating Jobs

To create a job, you first need to navigate to the create job screen. This is found under the *Diary* section of the navigation panel and is highlighted in Figure 1.

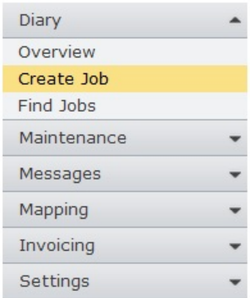

Figure 1: Location of the create job item in the navigation panel.

Once you have navigated to the *Create Job* screen the form shown in figure 2 will be presented to you. You will then be required to select a customer for the job from the drop down list. By selecting a customer, this will enable the site drop down list and it will be populated with the sites of the selected customer. You will now need to select a site for the job. The final drop down list will then be enabled to allow you to select an order for the job. The list will be populated with orders associated with selected customer and site.

Following the selection of a customer, site and order, you are required to complete the rest of the form. You must specify a site start and finish time, expected travel time, expected break time and a job rate. As well as this, it is possible to write comments against the job and state whether or not the job requires a signature.

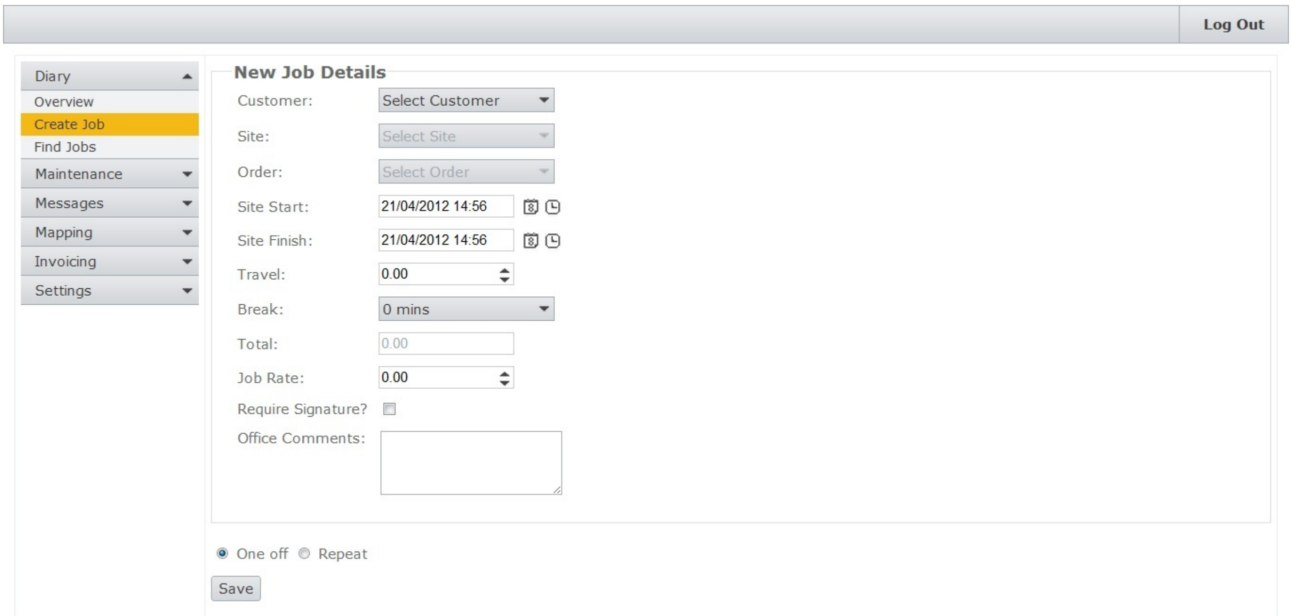

Figure 2: Create job form.

Now the main details for the job have been provided, all that is left to do is specify if the job will be a one off or if it is required to repeat. To do this, select the relevant radio button above the save button. If the job does not need to repeat then you can select the *One off* radio button. Otherwise select the *Repeat* radio button. In doing so, another form will be displayed which will allow you to define how the job should repeat. The repeat form is shown in Figure 3. It allows you to specify the repeat pattern and a repeat range. The pattern states whether the job should repeat daily, weekly or monthly. If you require the job to repeat weekly you must also specify whether the job should repeat every week, every 2 weeks, 3 weeks or 4 weeks and on which days of the week it should repeat. For monthly repeating jobs it is necessary to provide which day of the month the job should repeat on. The repeat range states how long the job should repeat. This can either be done by providing an end date or a number of jobs.

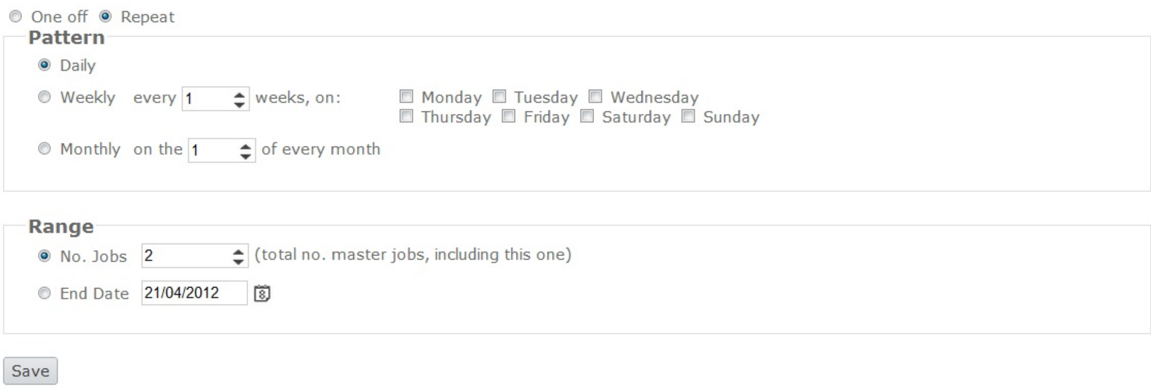

Figure 3: Job repeat details form.

To save the job, press the *Save* button. This will create the job and all repeating jobs. A message will be displayed informing you if the jobs were created successfully or not.

2.2 Finding Jobs

There are several ways in which a job can be found in the application. The first is by using the *Overview* screen and the second is by using the *Find Jobs* screen. Both of these methods will be discussed.

The *Overview* screen allows you to find jobs using the start date for the job. If you know what date the job has been booked for, then you can navigate to the date by either using the *Next Day* and *Previous Day* buttons or the calendar (highlighted in Figure 4). Once you have navigated to the required date, all jobs that have been booked for that date will be displayed in the tables. From here you can find the job you were looking for.

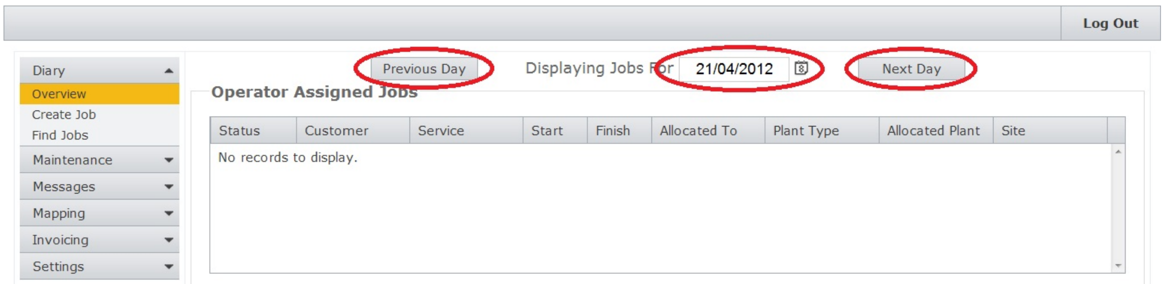

Figure 4: Date navigation on *Overview* screen.

There is also a dedicated screen whose sole responsibility is to provide you with the ability to easily find jobs. This screen can be found under the *Dairy* section of the navigation panel and is called *Find Jobs*. It gives you the ability to search for jobs by job number, customer, operator, subcontractor, site, plant item and date booked. These can be seen in Figure 5.

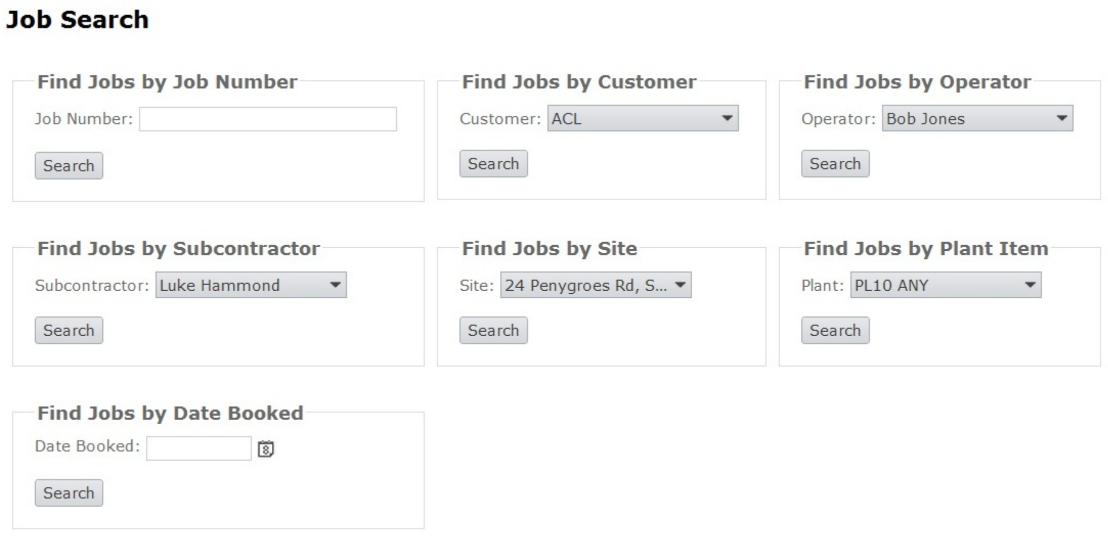

Figure 5: The *Job Search* screen.

Pressing the *Search* button will return a list of results related to your search criteria. The result list can be seen in Figure 6. Selecting one of the results in the list will take you to the job details page for the selected job.

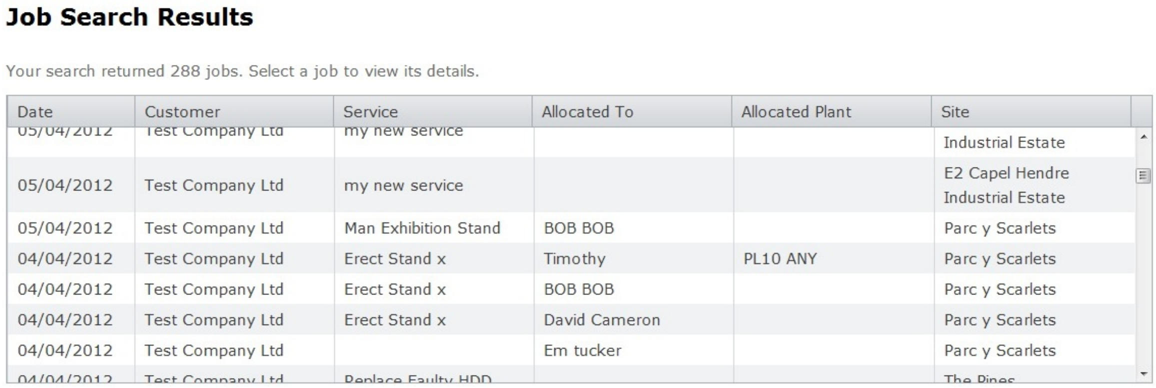

Figure 6: Job search results list.

2.3 Job Details

To view the details of a specific job, you can either select it from one of the lists on the *Overview* screen or from the search results screen. Selecting one of the jobs will display the screen shown in Figure 7.

The job details screen provides a lot of functionality related to manipulating the details of a job. To name a few, it allows you to update the general details of a job, update the allocation details of a job and delete a job. Each of these will be discussed in the following sections.

2.4 Job Manipulation

This section covers the tasks that can be performed from the job details screen.

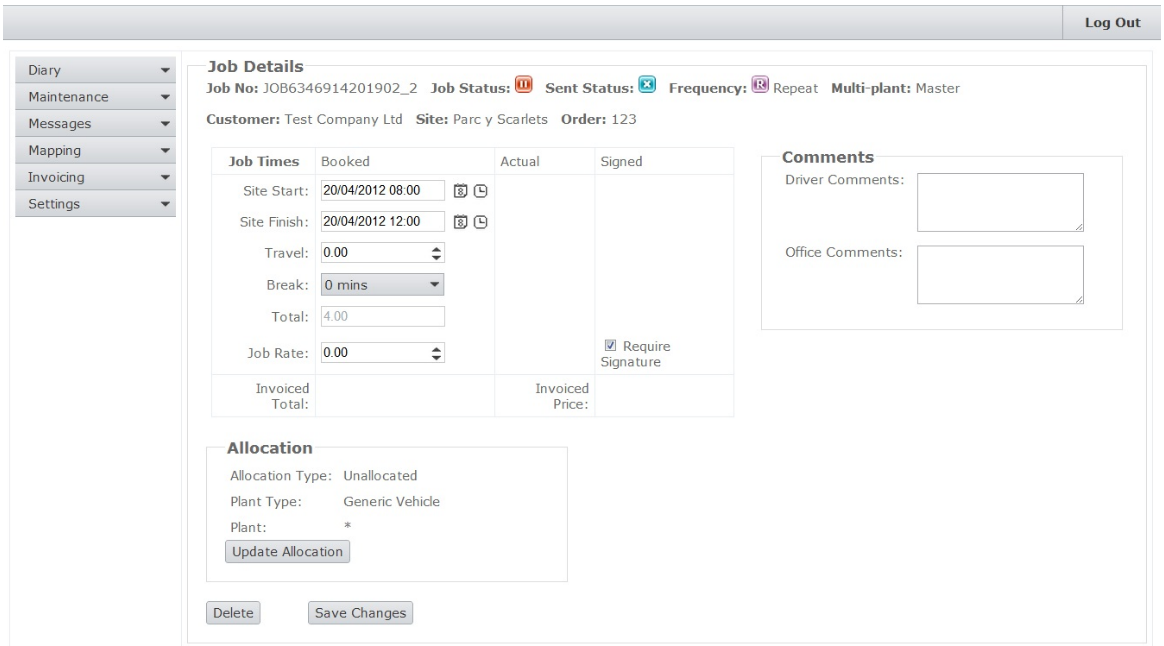

Figure 7: Job details screen.

2.4.1 Update Job Allocation

The allocation details for a job state who the job has been allocated to. It is possible to allocate a job to an operator or a subcontractor. If you don't want to allocate a job you can set the allocation type to be provisional or unallocated. To do this, you must first access the job details screen of the job you want to change the allocation details for. On this screen you must press the *Update Allocation* button. Doing this will present you with the form shown in Figure 8.

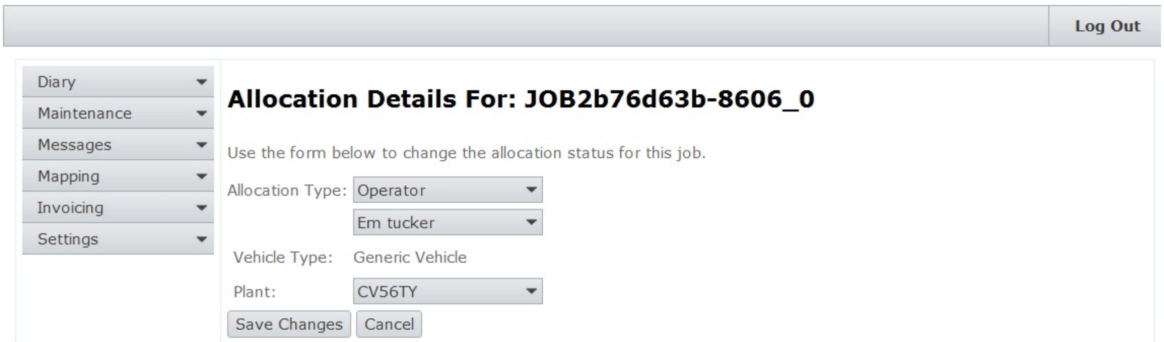

Figure 8: Job allocation details screen.

Use the form to select how you want to allocate the job. If you want to allocate the job to an operator, select *Operator* from the *Allocation Type* drop down list. You must then select the operator in the drop down list that appears below. If you want to allocate the job to a subcontractor, select *Subcontractor* from the *Allocation Type* drop down and then select the subcontractor you want to allocate the job to from the drop down list that appears below. When you allocate a job to a subcontractor you will also need to provide an agreed price for the job and an order number.

When the allocation type you choose is provisional, unallocated or operator, you can also select which plant item you want to allocate to the job. A plant list is provided which allows you to choose the desired plant item to allocate to the job. If you don't want to choose a particular plant item then you can select the * from the drop down list.

To save the allocation details, press the *Save Changes* button at the bottom of the screen. Alternatively, you can press the *Cancel* button to return to the job details without saving your changes.

2.4.2 Update Job Details

Certain details related to a job can be updated directly on the job details screen. The details that can be updated are the booked times and job rate, whether or not the job requires a signature and the office comments. These details are highlighted in red in Figure 9. Once you have made the changes you want to make to the job details, you can save the changes by pressing the *Save Changes* button at the bottom of the screen.

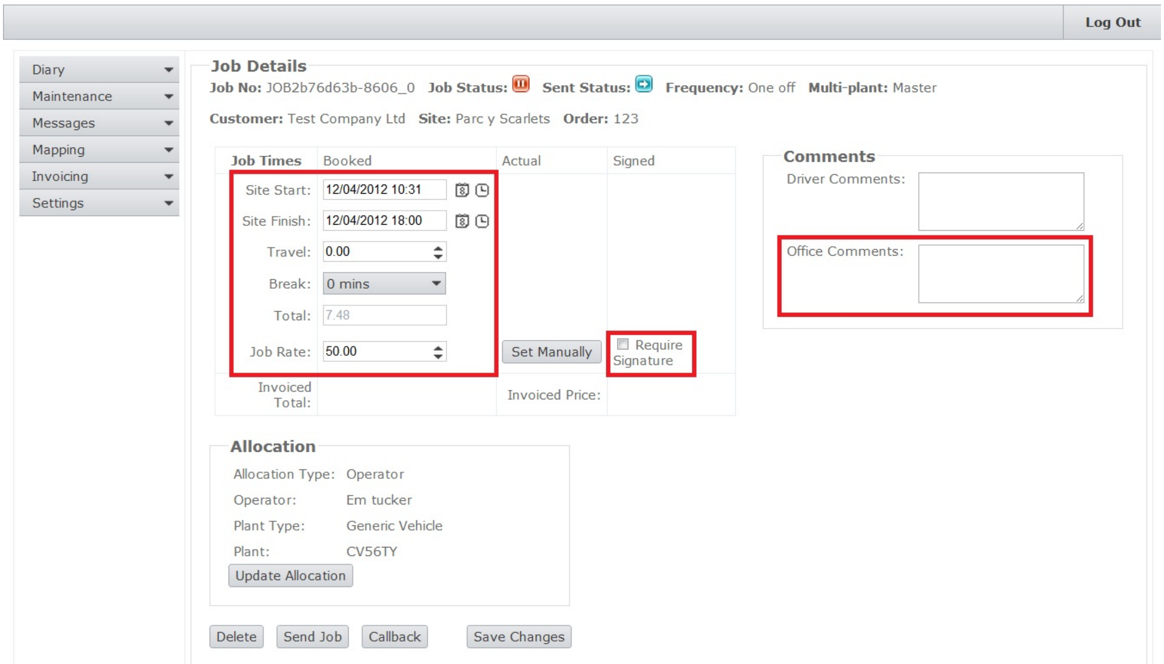

Figure 9: Job details that can be updated from the job details screen.

2.4.3 Manually Set Actual Job Times

Most of the time, the actual job times for a job will be recorded by the operator undertaking the job. However, if for some reason the actual times have not been recorded or are incorrect, it is possible to manually set these from the details screen. To do this, select the *Set Manually* button. This is highlighted in Figure 10.

After pressing the *Set Manually* button, you will be presented with the form shown in Figure 11. Firstly, fill in the form with the actual start time and the actual finish time for the job. Then press the *Save Changes* button to save the times for the job. If you do not want to save the times press the *Cancel* button and you will be returned to the job details screen.

2.4.4 Send Job to Operator

When a job has been allocated to an operator it is necessary to send the job to the allocated operators PDA/device. This can be done from the job details screen by pressing the *Send Job* button. You will then be presented with

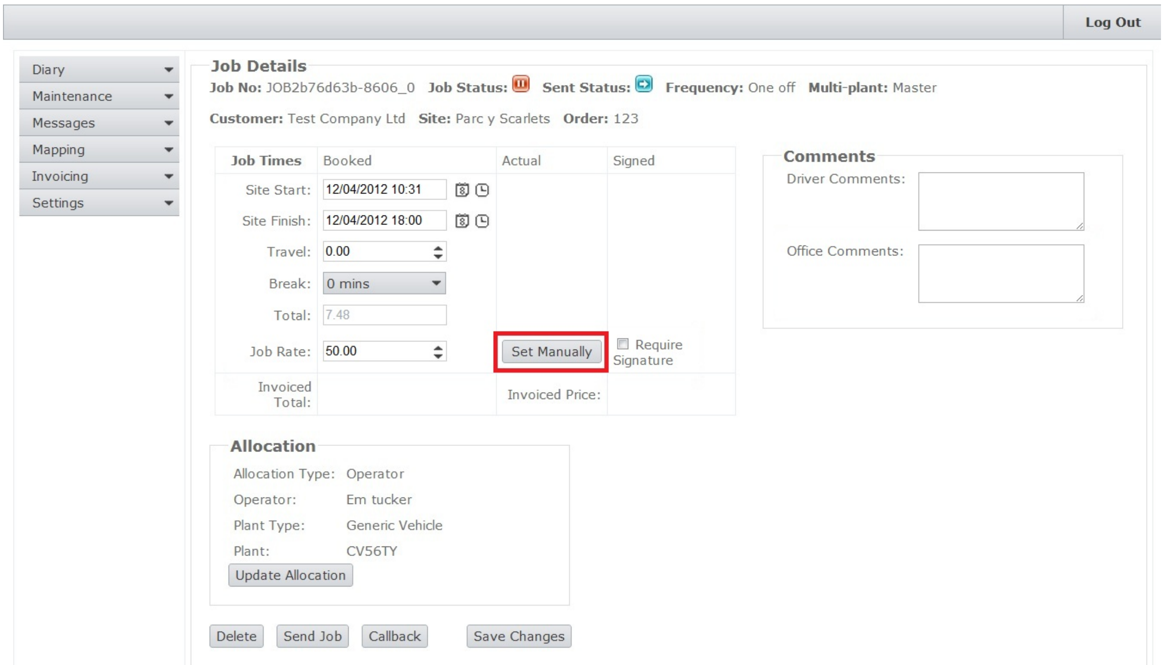

Figure 10: The button to allow the actual job times to be set manually.

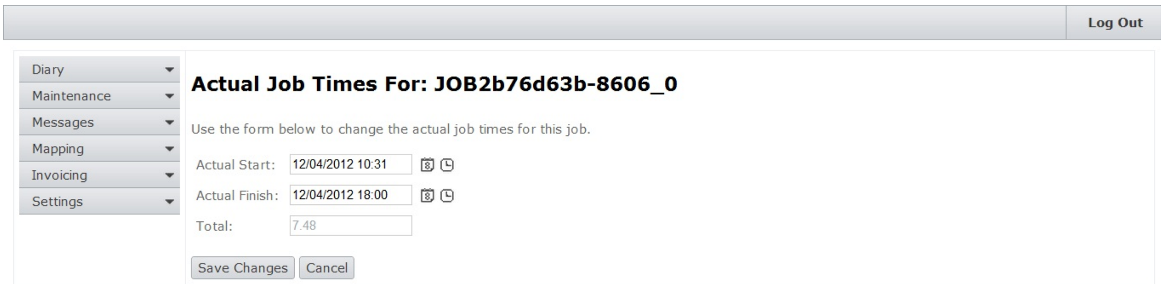

Figure 11: Manually setting the actual job times for a job.

a message stating whether it was possible to send the job to the operators device or not.

2.4.5 Callback Job from Operator

It may be necessary to remove a job from an operators device after it has been sent. This may be because you want to allocate the job to a different operator among other reasons. To do this, you can press the *Callback* button at the bottom of the screen. You will then be presented with a message stating whether it was possible to call the job back from the operators device or not.

2.4.6 Delete Job

To delete a job, you must select the *Delete* button at the bottom of the job details screen. You will then be presented with a message stating whether or not it was possible to delete the job.

3 Equipment and Services

This section of the document covers the functionality that is provided under the *Equipment and Services* item in the *Maintenance* section of the navigation panel.

3.1 Plant Types

All of the functions described in the following subsections are all found in the *Plant Types* tab on the *Equipment and Services* screen. The location of which is shown in Figure 12.

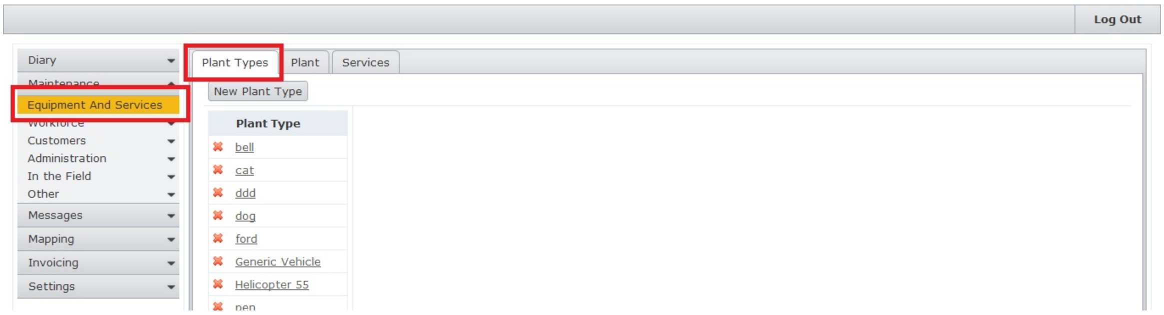

Figure 12: Location of the *Equipment and Services* item in the navigation panel and the *Plant Types* tab in the *Equipment and Services* screen.

3.1.1 Creating Plant Types

To add a new plant type to the system, you must first navigate to the *Plant Types* tab on the *Equipment and Services* screen. On this screen you will find a *New Plant Type* button. Select this button and you will be presented with the form shown in Figure 13. To create a new plant type, firstly complete the form by supplying a name and description for the plant type and then pressing *Create Plant Type*. The new plant type will then be added to the system.

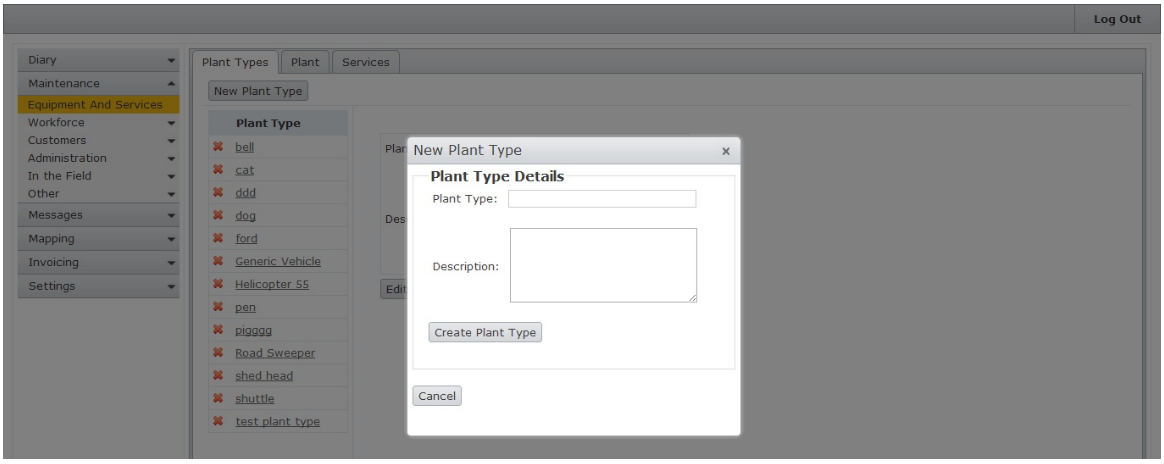

Figure 13: New plant type form.

3.1.2 Deleting Plant Types

To remove a plant type from the system, you must first navigate to the *Plant Types* tab on the *Equipment and Services* screen. On this screen you will find a list of plant types on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the plant type from the system. The cross/delete button has been highlighted for one of the plant types in Figure 14.

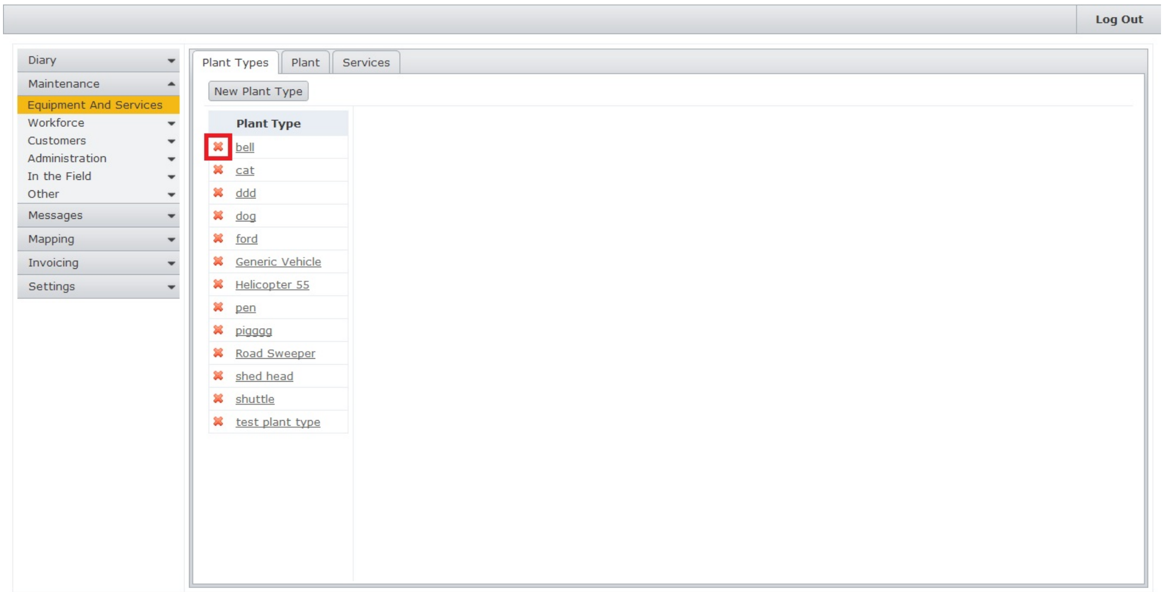

Figure 14: Delete plant type button.

3.1.3 Viewing Plant Type Details

Once you have navigated to the screen shown in Figure 12, you can view the details of any plant type that has been created. To do this, select the name of the plant type you want to view the details for in the plant type list, which is located on the left hand side of the screen. On selecting a plant type in the list, the details of the plant type will be shown to the right of the plant type list. This is highlighted in green in Figure 15. The plant type list is highlighted in red in Figure 15.

3.1.4 Editing Plant Type Details

To be able to edit a plant type you must first select the plant type in the plant type list. This will present you with the details for the selected plant type and two buttons. The only button that will be enabled initially is the *Edit* button. You must select this button to allow changes to be made to the details. Once you have made the relevant changes to the plant type details, press the *Save* button.

3.2 Plant

All of the functions described in the following subsections are all found in the *Plant* tab on the *Equipment and Services* screen. The location of which is shown in Figure 16.

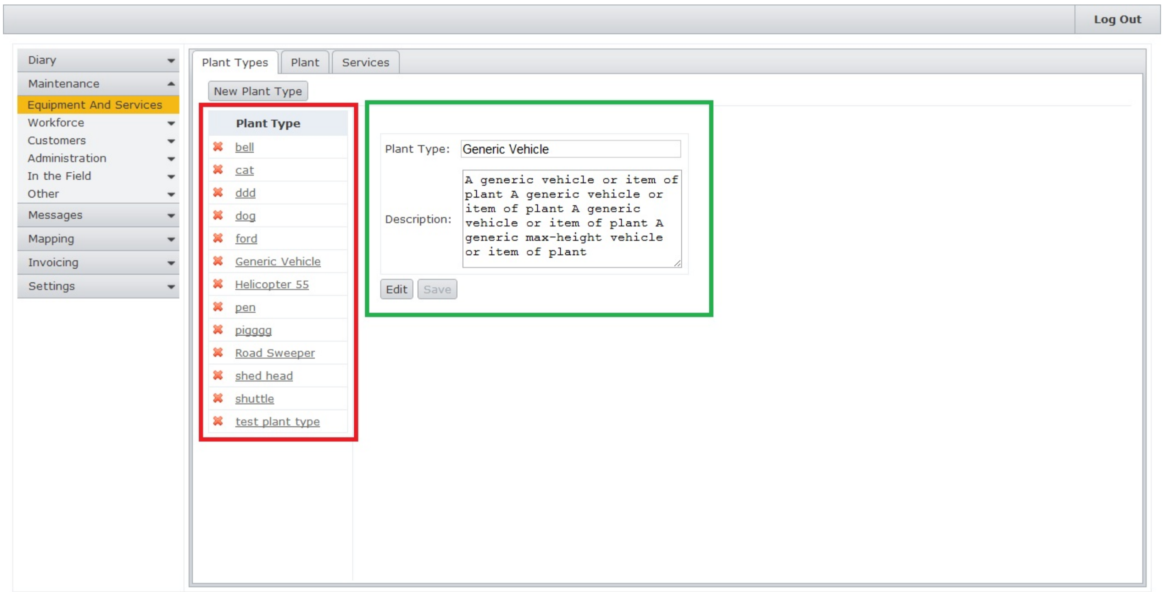

Figure 15: Plant type details (green) and plant type list (red).

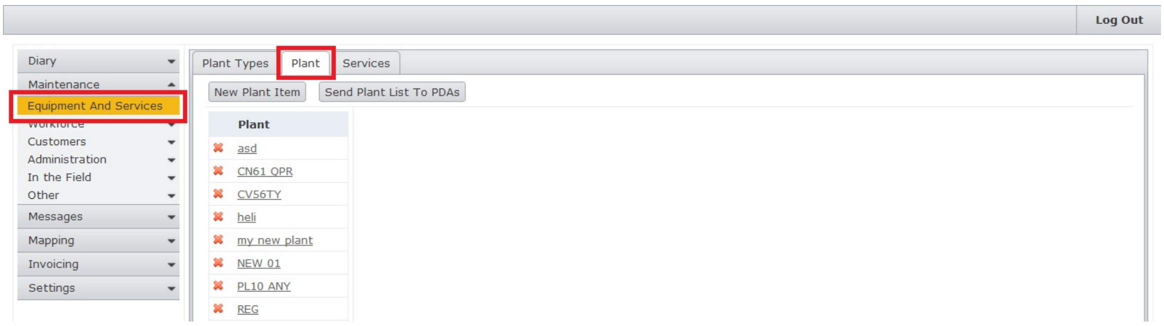

Figure 16: Location of the *Equipment and Services* item in the navigation panel and the *Plant* tab in the *Equipment and Services* screen.

3.2.1 Creating Plant Items

To add a new plant item to the system, you must first navigate to the *Plant* tab on the *Equipment and Services* screen. On this screen you will find a *New Plant Item* button. Select this button and you will be presented with the form shown in Figure 17. To create a new plant item, firstly complete the form and then press the *Create Plant Item* button. The new plant item will then be added to the system. You must supply a registration/ID for the plant item otherwise it will not be created. The form also lets you specify a maintenance schedule for the plant item if one is required, as well as being able to assign operators to the plant item. You can assign a maintenance schedule for the plant item by checking the box next to the text, *Maintenance Schedule*. This will enable the fields below, allowing you to enter dates for MOT, next service, next check and road tax expiry. You can also add comments for the maintenance schedule. Assigning operators to a plant item is done in a similar way. First check the box next to the text, *Assign Operator*, and then select the operators from the list you wish to assign to the plant item.

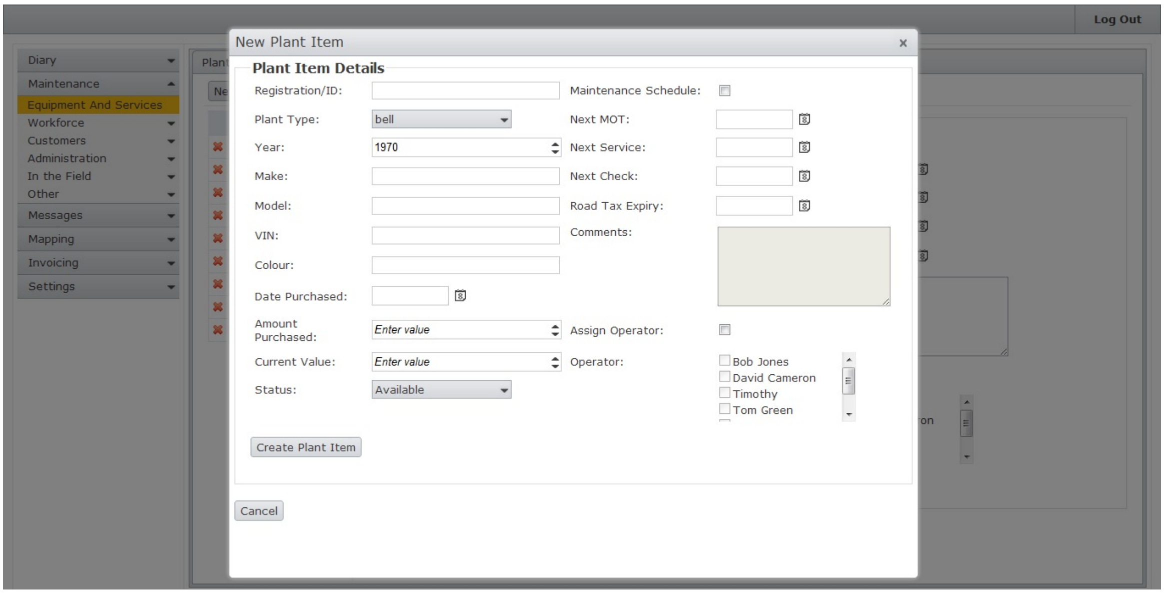

Figure 17: New plant item form.

3.2.2 Deleting Plant Items

To remove a plant item from the system, you must first navigate to the *Plant* tab on the *Equipment and Services* screen. On this screen you will find a list of plant items on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the plant item from the system. The cross/delete button has been highlighted for one of the plant items in Figure 18.

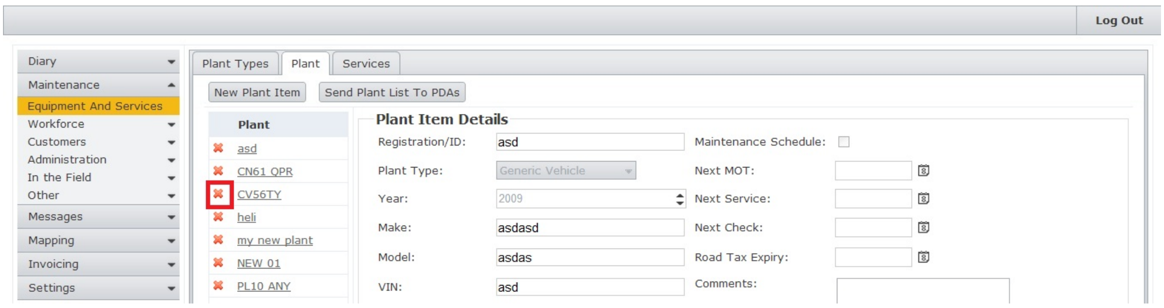

Figure 18: Delete plant type button.

3.2.3 Viewing Plant Item Details

Once you have navigated to the screen shown in Figure 16, you can view the details of any plant item that has been created. To do this, select the name of the plant item you want to view the details for in the plant list, which is located on the left hand side of the screen. On selecting a plant item from the list, the details of the plant will be shown to the right of the plant list. This is highlighted in green in Figure 19. The plant type list is highlighted in red in Figure 19.

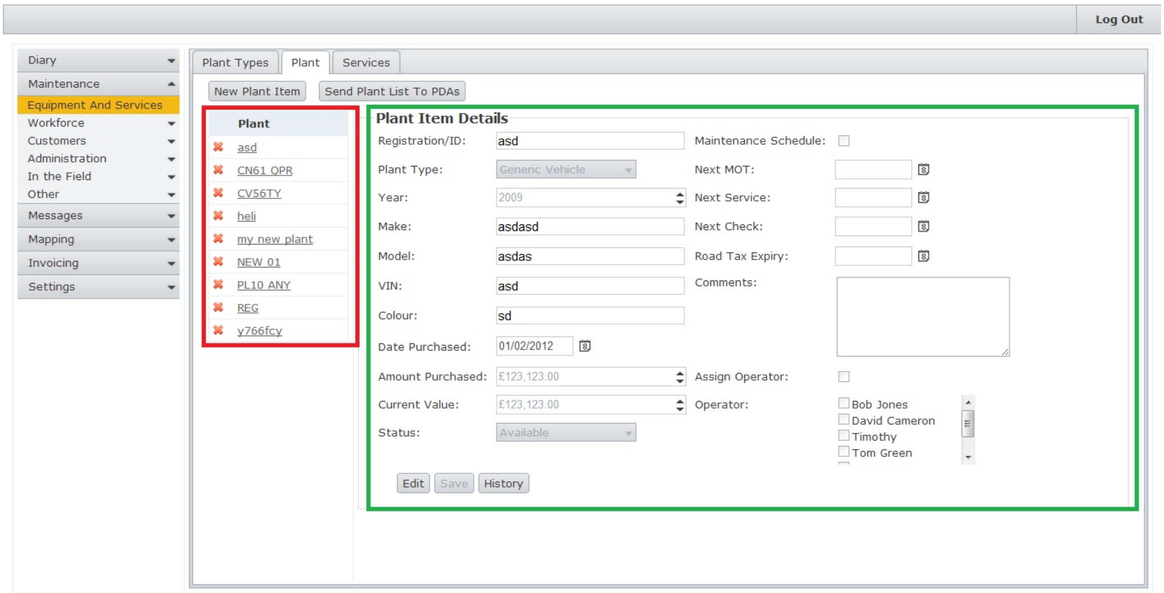

Figure 19: Plant details (green) and plant item list (red).

3.2.4 Editing Plant Item Details

To be able to edit a plant item you must first select the plant item in the plant item list. This will present you with the details for the selected plant item. There will also be an *Edit* button at the bottom of the plant item details. You must select this button to allow changes to be made to the details. Once you have made the relevant changes to the details of the plant item, press the *Save* button to commit your changes.

3.2.5 Plant Item History

When you view the details for a specific plant item, there is a *History* button at the bottom of the screen. Pressing this button will take you to a screen that allows you to record, view, edit and delete events concerning the plant item. The plant history screen is shown is Figure 20. If you want to record an event against the plant item, press the *Add new record* button located at the top of the table of events. This will create a new record in the table, in which you can provide the details for the event. When events have been created, it is possible to edit it by pressing the edit button (highlighted in yellow in Figure 20) next to the relevant record. When you have made the changes you require, press the OK button which is marked with a tick on the right of the grid. Alternatively, you can discard your changes by pressing the cancel button which is marked with a cross. You can remove events from the system by pressing the cross next to the relevant record in the table.

3.2.6 Send Plant List to PDAs

When changes have been made to the plant list, it is necessary to update the plant lists that are stored on the PDA devices out in the field. This can be done by pressing the *Send Plant List to PDAs* button located at the top of the *Plant* screen. You will then be presented with a message stating whether it was possible to send the list to the PDAs or not.

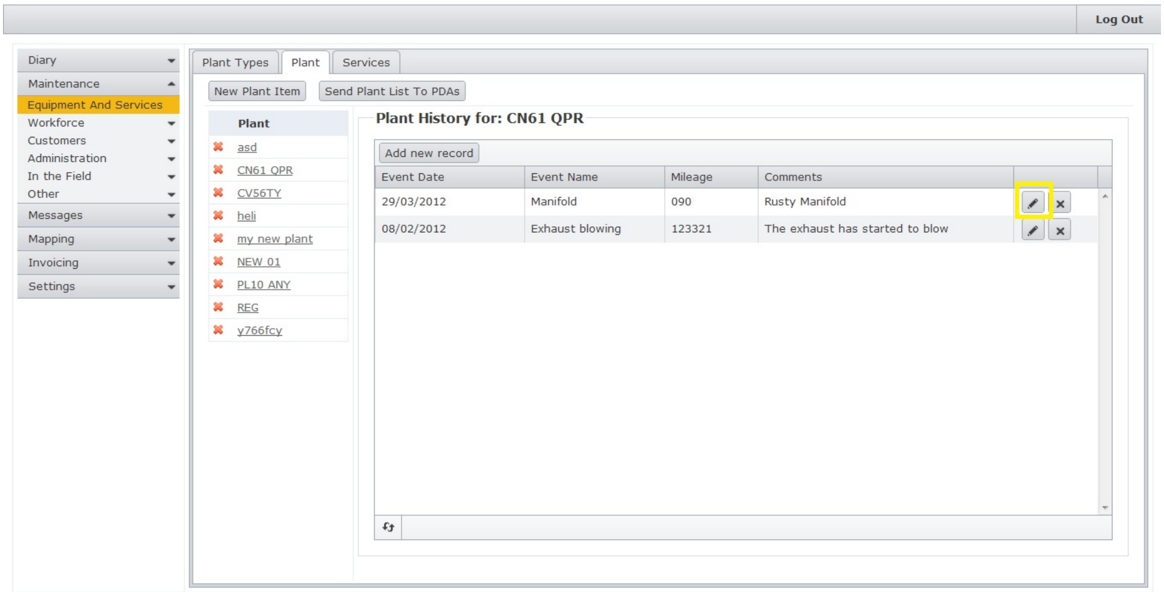

Figure 20: The plant history screen.

3.3 Services

All of the functions described in the following subsections are all found in the *Services* tab on the *Equipment and Services* screen. The location of which is shown in Figure 21.

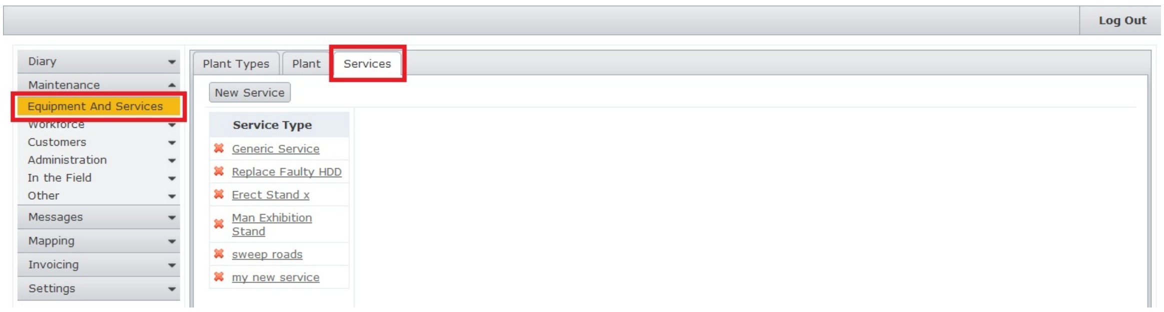

Figure 21: Location of the *Equipment and Services* item in the navigation panel and the *Services* tab in the *Equipment and Services* screen.

3.3.1 Creating Services

To add a new service to the system, you must first navigate to the *Services* tab on the *Equipment and Services* screen. On this screen you will find a *New Service* button. Select this button and you will be presented with the form shown in Figure 22. To create a new service, firstly complete the form and then press the *Create Service* button. The new service will then be added to the system.

When completing the form, you will be required to supply a name and description for the service. You must also specify the hire type for the service. This can either be hourly or unit hire. If the latter is chosen a text description must be provided in the box next to the *Unit hire* text. It is important that you specify rates for the service in the *Rates* section of the form. Only the rates relevant to the hire type selected will be enabled.

In the final part of the form, *Required Plant*, you must specify what plant items are required to carry out the service you are creating. To do this, select the plant item from the drop down list, input the quantity of plant item that is required and then press the *Add* button. This will add the selection to the list of required plant. If you want to remove plant items from the list, select it in the list and press the *Remove* button.

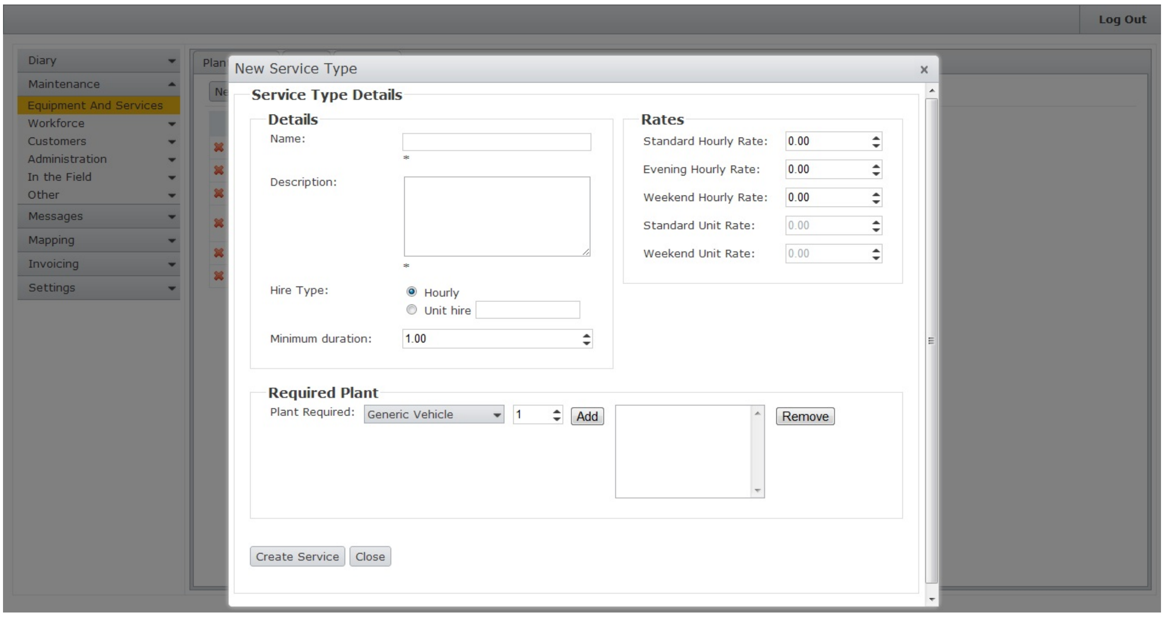

Figure 22: New service form.

3.3.2 Deleting Services

To remove a service from the system, you must first navigate to the *Services* tab on the *Equipment and Services* screen. On this screen you will find a list of services on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the service from the system.

3.3.3 Viewing Service Details

Once you have navigated to the screen shown in Figure 21, you can view the details of any service that has been created. To do this, select the name of the service you want to view the details for in the service list, which is located on the left hand side of the screen. On selecting a service from the list, the details of the service will be shown to the right of the service list. This is highlighted in green in Figure 23. The service list is highlighted in red in Figure 23.

3.3.4 Editing Service Details

To be able to edit a service you must first select the service in the services list. This will present you with the details for the selected service and two buttons. The only button that will be enabled initially is the *Edit* button. You must select this button to allow changes to be made to the details. Once you have made the relevant changes to the plant type details, press the *Save* button.

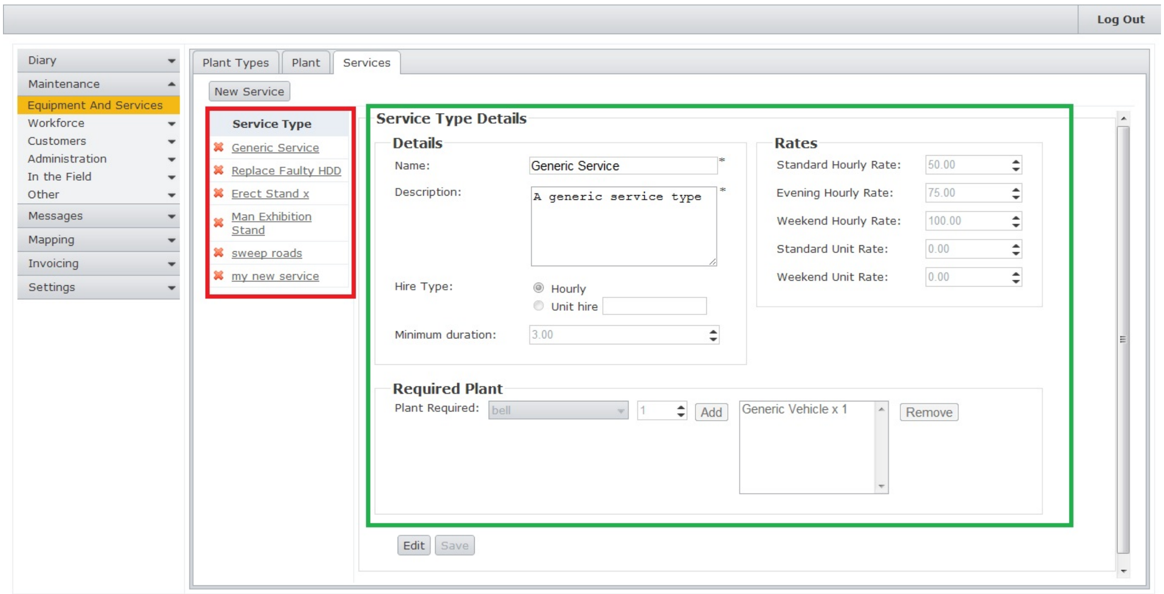

Figure 23: Service details (green) and service list (red).

4 Workforce

This section of the document covers the functionality that is provided under the *Workforce* item in the *Maintenance* section of the navigation panel.

4.1 Users

When you select the *Users* item on the navigation panel you will be presented with the users screen. It consists of a list of users on the left hand side of the screen and a *New User* button at the top of the screen. From this screen you can create new users for the system, remove users from the system, view the details stored for a particular user and edit user details. Each of these functions will be discussed in the following subsections.

4.1.1 Creating Users

To create a new user, you must select the *New User* button which is located at the top of the users screen. On selecting the button, the form shown in Figure 24 will be presented to you. Complete the form by entering a first name, surname, login name, phone number, mobile number and email address for the user. You must then decide the rights level you want to give to the user from the drop down list. The rights level can be read only, read and write or full rights. A user must be associated with an address and you can select an address for the user by pressing the *Select Address* button. This will bring up a window that will allow you to search through all addresses held in the system. You can also add an address if needs be. Once you have found the address for the user, select the address and press *OK*. The address details on the new user form should be filled automatically with the selected address details. The final part of creating a user is to create a password. The password must be at least 6 characters long and you must re-enter the password successfully. Now you can press the *Save* button to add the new user to the system. If there are any errors with the details you supplied on the form you will be notified and allowed to correct the errors. You can then re-submit the form.

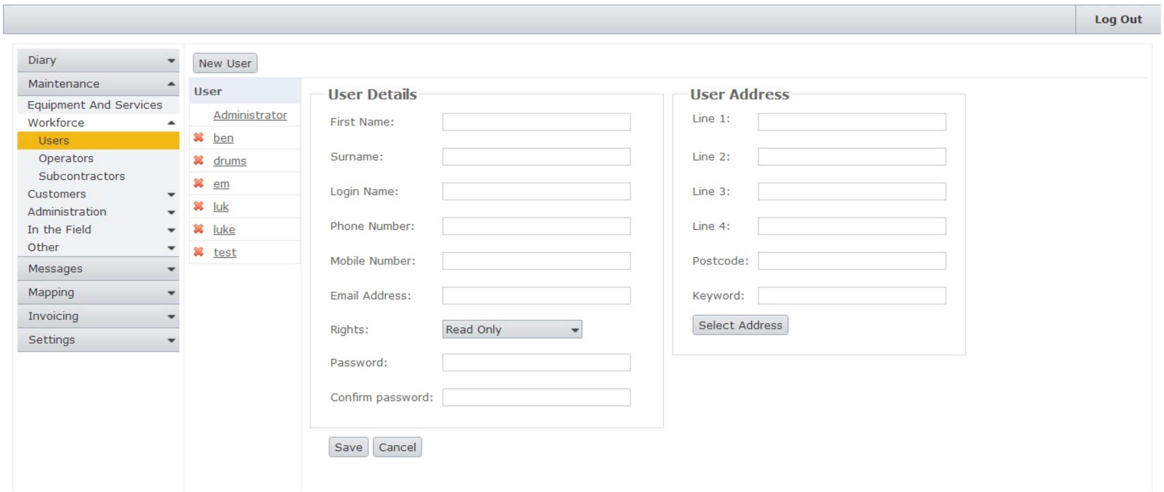

Figure 24: The new user form.

4.1.2 Deleting Users

To remove a user from the system, you must first navigate to the *Users* screen by selecting the *Users* item under the *Workforce* section of the navigation panel. On this screen you will find a list of users on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the user from the system.

4.1.3 Viewing User Details

Once you have navigated to the *Users* screen, you can view the details of any user that has been created. To do this, select the name of the user you want to view the details for in the user list, which is located on the left hand side of the screen. On selecting a user from the list, the details of the user will be shown to the right of the user list. This is highlighted in green in Figure 25. The user list is highlighted in red in Figure 25.

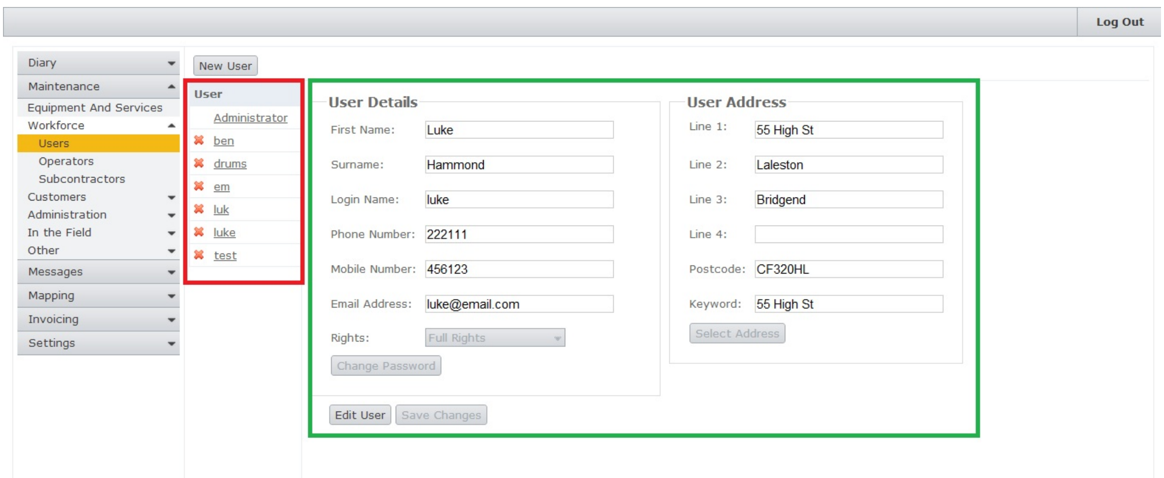

Figure 25: User details (green) and user list (red).

4.1.4 Editing User Details

To be able to edit a user, you must first select the user in the users list. This will present you with the details for the selected user and a few buttons. The only button that will be enabled initially is the *Edit* button. You must select this button to allow changes to be made to the details. Once you have made the relevant changes to the user details, press the *Save Changes* button. As well as changing the user details and the address associated with a particular user, it is also possible to change a users password. To do this you must press the *Change Password* button. You will then be displayed with the *Change Password* screen, which is shown in Figure 26. You must enter the current password along with the new password for the user and then confirm the new password by re-entering it. To complete, press the *Change Password* button. On doing so, you will be notified whether the password was changed successfully or not.

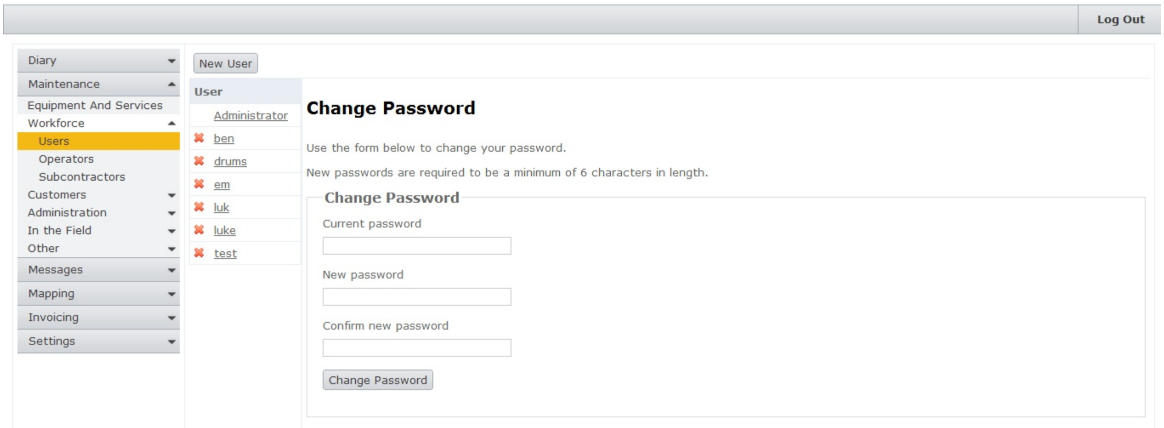

Figure 26: The change user password screen.

4.2 Operators

When you select the *Operators* item on the navigation panel you will be presented with the operators screen. It consists of a list of operators on the left hand side of the screen, a *New Operator* button, a *Send Operator List To PDAs* button at the top of the screen. From this screen you can create new operators for the system, remove operators from the system, view the details stored for a particular operator and edit operator details. Each of these functions will be discussed in the following subsections.

4.2.1 Creating Operators

To create a new operator, you must select the *New Operator* button which is located at the top of the operators screen. On selecting the button, the form shown in Figure 27 will be presented to you. Complete the form by entering a first name, surname, nickname, login name, licence number, phone number, mobile number and email address for the operator. An operator must be associated with an address and you can select an address for the operator by pressing the *Select Address* button. This will bring up a window that will allow you to search through all addresses held in the system. You can also add an address if needs be. Once you have found the address for the operator, select the address and press *OK*. The address details on the new operator form should be filled automatically with the selected address details. You must also create a password for the operator. The password must be at least 6 characters long and you must re-enter the password successfully.

The next part of the form requires you to specify what skills the operator has. You do this by selecting the check box next to the skill in the list of skills in the *Operator Skills* section of the form. Finally, the form allows you to allocate a plant item and a device to the operator if you want to. This can be done by selecting the appropriate item in the drop down lists in the *Operator Assignments* section.

Now you can press the *Save* button to add the new operator to the system. If there are any errors with the details you supplied on the form you will be notified and allowed to correct the errors. You can then re-submit the form.

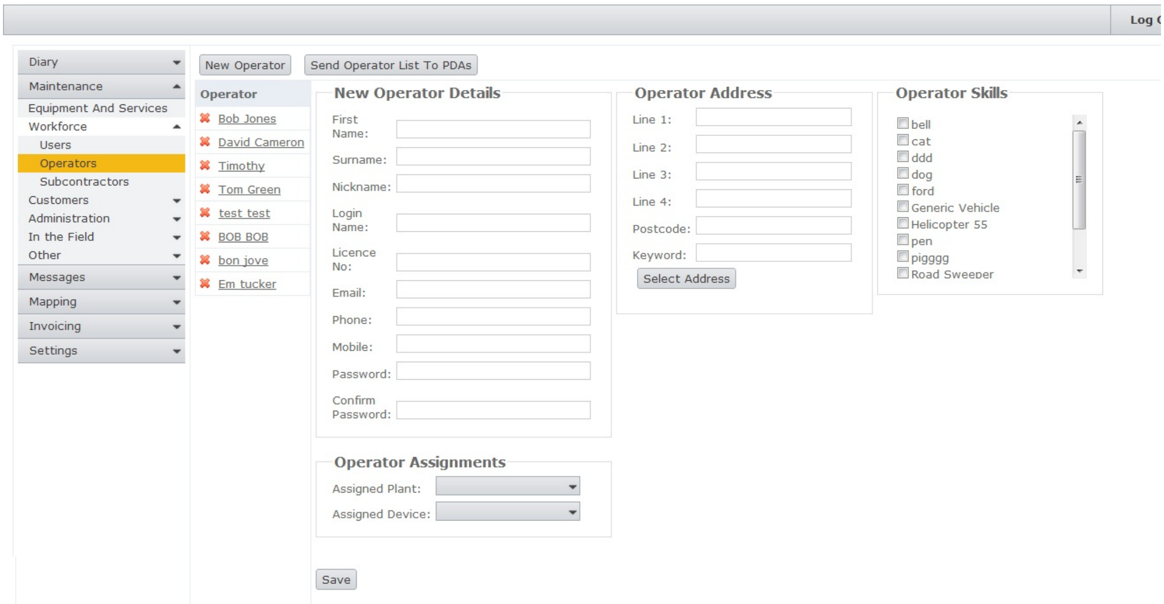

Figure 27: The new operator form.

4.2.2 Deleting Operators

To remove an operator from the system, you must first navigate to the *Operators* screen by selecting the *Operators* item under the *Workforce* section of the navigation panel. On this screen you will find a list of operators on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the operator from the system.

4.2.3 Viewing Operator Details

Once you have navigated to the *Operators* screen, you can view the details of any operator that has been created. To do this, select the name of the operator you want to view the details for in the operator list, which is located on the left hand side of the screen. On selecting an operator from the list, the details of the operator will be shown to the right of the operator list. This is highlighted in green in Figure 28. The operator list is highlighted in red in Figure 28.

4.2.4 Editing Operator Details

To be able to edit an operator, you must first select the operator in the operators list. This will present you with the details for the selected operator and an *Edit* button. You must select the *Edit* button to allow changes to be made to the details. Once you have made the relevant changes to the operator details, press the *Save* button. As well as changing the operator details and the address associated with a particular operator, it is also possible to change an operators password. To do this you must press the *Change Password* button. You will

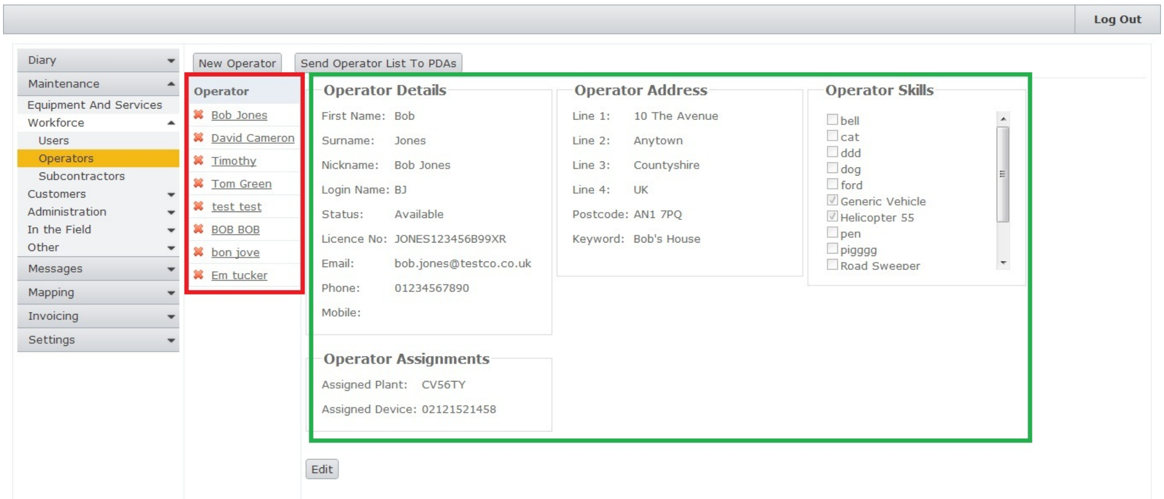

Figure 28: Operator details (green) and operator list (red).

then be displayed with the *Change Password* screen, which is similar to the screen shown in Figure 26. You must enter the current password along with the new password for the user and then confirm the new password by re-entering it. To complete, press the *Change Password* button. On doing so, you will be notified whether the password was changed successfully or not.

For a particular operator, you can set their employment status as well as recording any leave that they have booked. You can do this by selecting the *Set Status* button on the edit operator screen. This will take you to the screen shown in Figure 29.

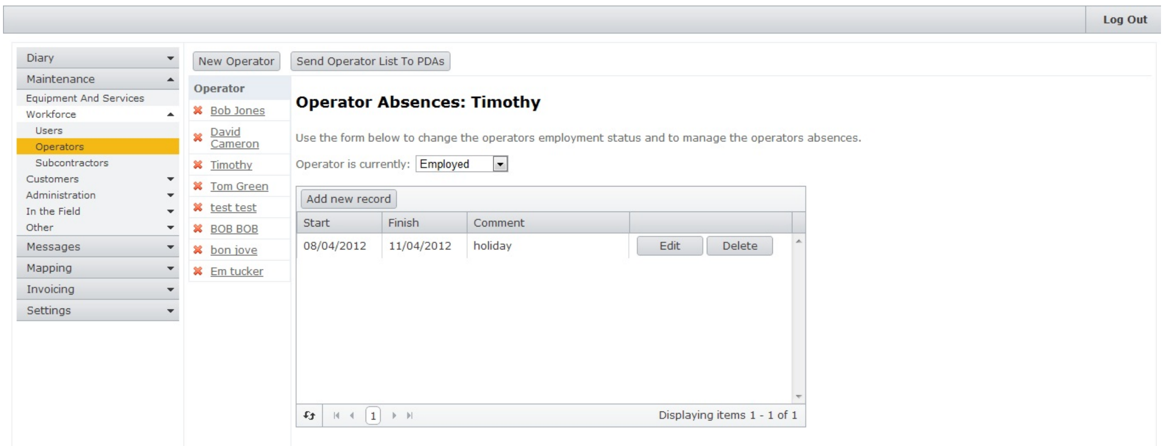

Figure 29: Operator absences form which can be used to record any holidays an operator has taken/booked and to update the employment status for an operator.

4.2.5 Send Operator List to PDAs

When changes have been made to the operator list, it is necessary to update the operator lists that are stored on the PDA devices out in the field. This can be done by pressing the *Send Operator List to PDAs* button located at the top of the *Operators* screen. You will then be presented with a message stating whether it was possible to send the list to the PDAs or not.

4.3 Subcontractors

When you select the *Subcontractors* item on the navigation panel you will be presented with the subcontractors screen. It consists of a list of subcontractors on the left hand side of the screen and a *New Subcontractor* button. From this screen you can create new subcontractors for the system, remove subcontractors from the system, view the details stored for a particular subcontractor and edit subcontractor details. Each of these functions will be discussed in the following subsections.

4.3.1 Creating Subcontractors

To create a new subcontractor, you must select the *New Subcontractor* button which is located at the top of the subcontractors screen. On selecting the button, the form shown in Figure 30 will be presented to you. Complete the form by entering a subcontractor name, contact name, phone number, mobile number, fax number and email address for the subcontractor. You can also select the status of the subcontractor, which can either be active or inactive. A subcontractor must be associated with an address and you can select an address for the subcontractor by pressing the *Select Address* button. This will bring up a window that will allow you to search through all addresses held in the system. You can also add an address if needs be. Once you have found the address for the subcontractor, select the address and press *OK*. The address details on the new subcontractor form should be filled automatically with the selected address details. Finally, you must complete the *Subcontractor Skills* section of the form. Simply select the checkbox next to each skill that the subcontractor can provide. To save the subcontractor, press the *Save* button.

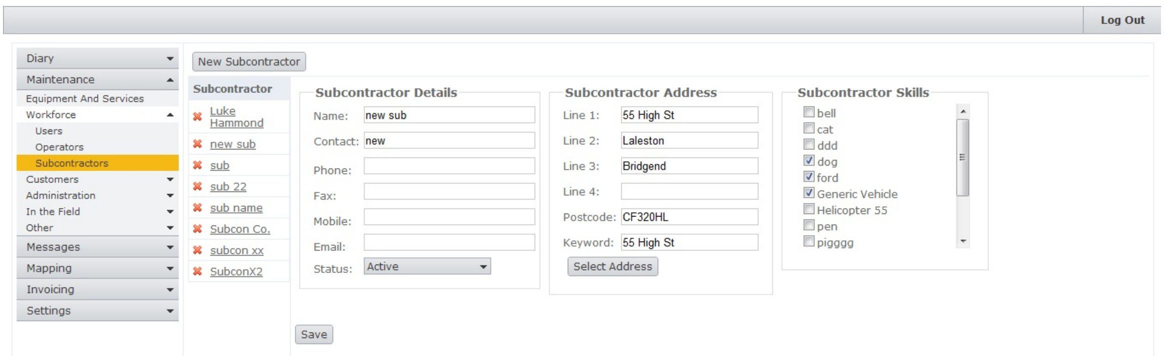

Figure 30: New subcontractor form.

4.3.2 Deleting Subcontractors

To remove a subcontractor from the system, you must first navigate to the *Subcontractors* screen by selecting the *Subcontractors* item under the *Workforce* section of the navigation panel. On this screen you will find a list of subcontractors on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the subcontractor from the system.

4.3.3 Viewing Subcontractor Details

Once you have navigated to the *Subcontractors* screen, you can view the details of any subcontractor that has been created. To do this, select the name of the subcontractor you want to view the details for in the subcontractor list, which is located on the left hand side of the screen. On selecting a subcontractor from the list, the details of the subcontractor will be shown to the right of the subcontractor list. This is highlighted in green in Figure 31. The subcontractor list is highlighted in red in Figure 31.

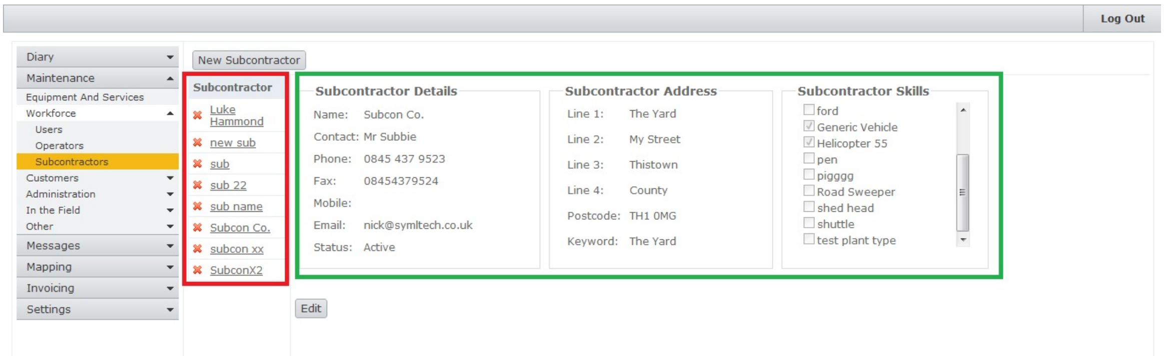

Figure 31: Subcontractor details (green) and subcontractor list (red).

4.3.4 Editing Subcontractor Details

To be able to edit a subcontractor, you must first select the subcontractor in the subcontractors list. This will present you with the details for the selected subcontractor and an *Edit* button. You must select the *Edit* button to allow changes to be made to the details. Once you have made the relevant changes to the subcontractor details, press the *Save* button.

5 Customers

This section of the document covers the functionality that is provided under the *Customers* item in the *Maintenance* section of the navigation panel.

5.1 Customers

When you select the *Customers* item on the navigation panel you will be presented with the customers screen. It consists of a list of customers on the left hand side of the screen and a *New Customer* button. From this screen you can create new customers for the system, remove customers from the system, view the details stored for a particular customer and edit customer details. Each of these functions will be discussed in the following subsections.

5.1.1 Creating Customers

To create a new customer, you must select the *New Customer* button which is located at the top of the customers screen. On selecting the button, the form shown in Figure 32 will be presented to you. Complete the form by entering a name, phone number, fax number, email address and contact name for the customer. You can also set the status of the customer, which can either be unknown, OK, caution or stop. A customer must be associated with an address and you can select an address for the customer by pressing the *Select Address* button. This will bring up a window that will allow you to search through all addresses held in the system. You can also add an address if needs be. Once you have found the address for the customer, select the address and press *OK*. The address details on the new customer form should be filled automatically with the selected address details. Finally, save the customer by pressing the the *Save* button.

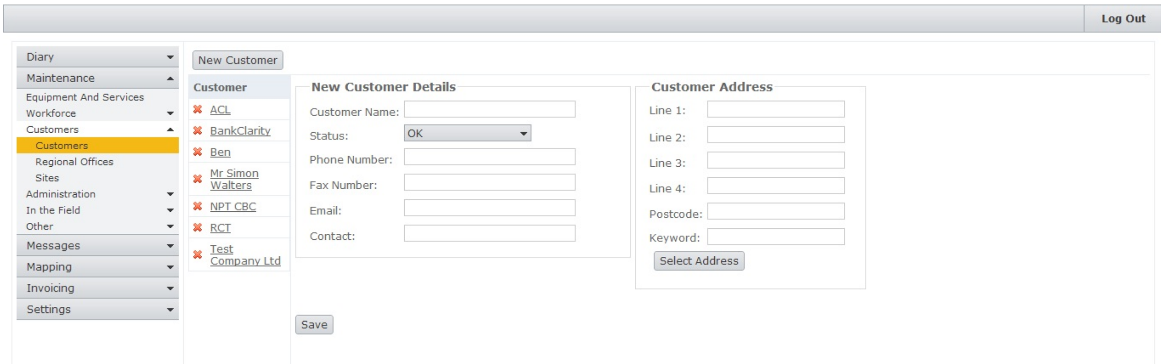

Figure 32: New customer form.

5.1.2 Deleting Customers

To remove a customer from the system, you must first navigate to the *Customers* screen by selecting the *Customers* item under the *Customers* section of the navigation panel. On this screen you will find a list of customers on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the customer from the system.

5.1.3 Viewing Customer Details

Once you have navigated to the *Customers* screen, you can view the details of any customer that has been created. To do this, select the name of the customer you want to view the details for in the customers list, which is located on the left hand side of the screen. On selecting a customer from the list, the details of the customer will be shown to the right of the customers list. This is highlighted in green in Figure 33. The customers list is highlighted in red in Figure 33. As well as the details for the customer, a list of the customers sites will be shown to you on the customer details screen.

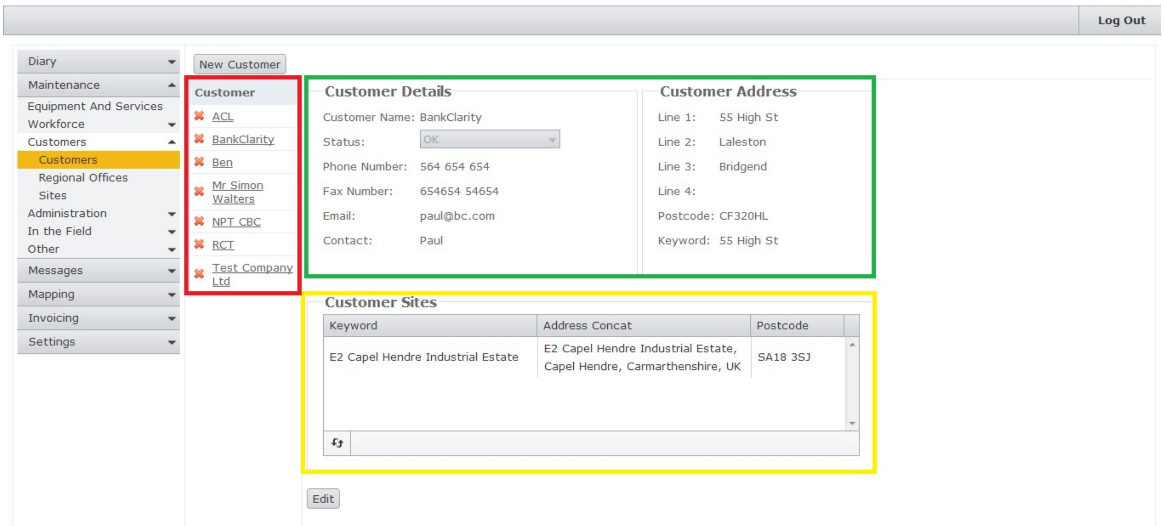

Figure 33: Customer details (green), customers list (red) and customer sites (yellow).

5.1.4 Editing Customer Details

To be able to edit a customer, you must first select the customer in the customers list. This will present you with the details for the selected customer and an *Edit* button. You must select the *Edit* button to allow changes to be made to the details. Once you have made the relevant changes to the customer details, press the *Save* button.

Also available at this screen is the ability to set custom service rates for the customer. To do this, select the *Edit Rates* button. This will present you with the screen shown in Figure 34. First select the service you require to set custom rates for, from the drop down list. This is outlined in red in Figure 34.

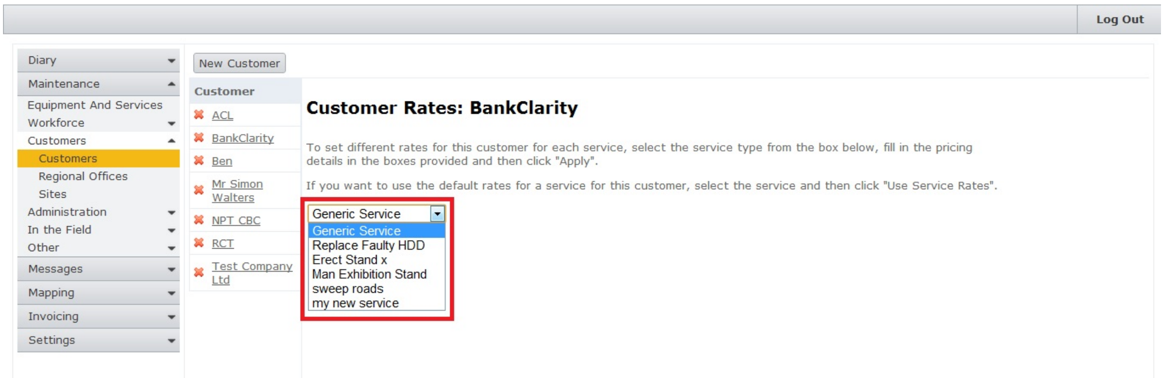

Figure 34: The customer rates screen.

On selecting a service from the list, you will be shown the current service rates that are set for the customer. This is shown in Figure 35. You are then free to make any changes to rates as you require. When you are happy with the rates, press the *Apply* button to save the rates. You can also remove the custom rates by pressing the *Use Service Rates* button. The customer will then be charged the default rates that are set for the service.

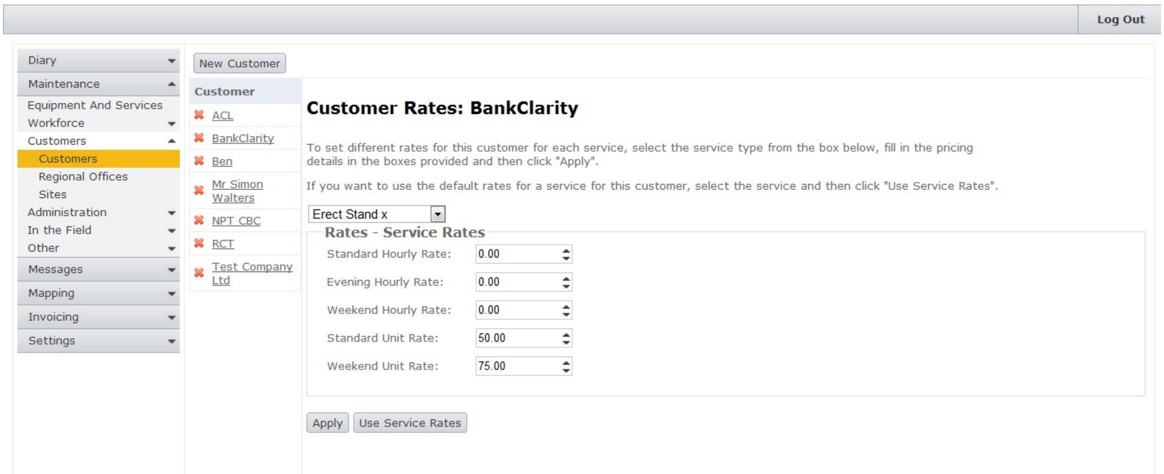

Figure 35: The customer rates screen with the service rates shown for a particular service.

5.2 Regional Offices

When you select the *Regional Offices* item on the navigation panel you will be presented with the regional offices screen. It consists of a list of regional offices on the left hand side of the screen and a *New Regional Office* button. From this screen you can create new regional offices for the system, remove regional offices from the system, view the details stored for a particular regional office and edit regional office details. Each of these functions will be discussed in the following subsections.

5.2.1 Creating Regional Offices

To create a new regional office, you must select the *New Regional Office* button which is located at the top of the regional offices screen. On selecting the button, the form shown in Figure 36 will be presented to you. Complete the form by choosing a customer related to the regional office, entering an email address, office contact name, contact phone number, phone number and fax number. A regional office must be associated with an address and you can select an address for the regional office by pressing the *Select Address* button. This will bring up a window that will allow you to search through all addresses held in the system. You can also add an address if needs be. Once you have found the address for the regional office, select the address and press *OK*. The address details on the new regional office form should be filled automatically with the selected address details. Finally, save the regional office by pressing the *Save* button.

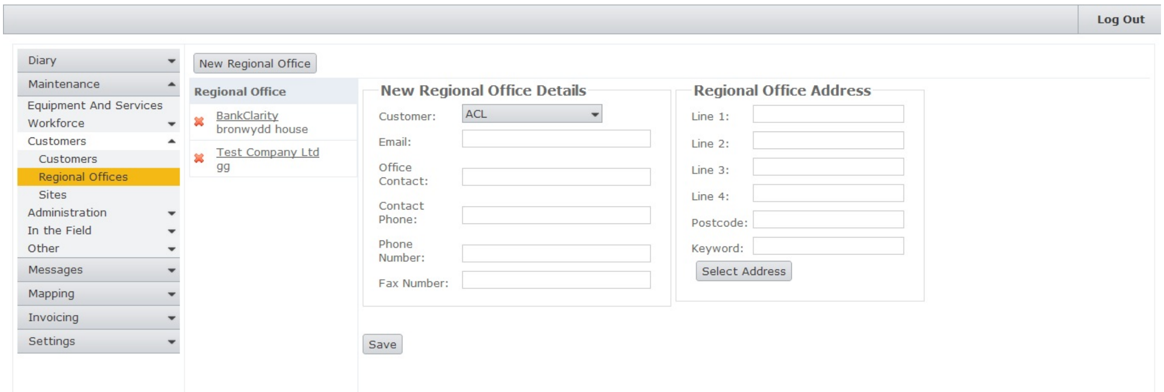

Figure 36: New regional office form.

5.2.2 Deleting Regional Offices

To remove a regional office from the system, you must first navigate to the *Regional Offices* screen by selecting the *Regional Offices* item under the *Customers* section of the navigation panel. On this screen you will find a list of regional offices on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the regional office from the system.

5.2.3 Viewing Regional Office Details

Once you have navigated to the *Regional Offices* screen, you can view the details of any regional office that has been created. To do this, select the regional office you want to view the details for in the regional offices list, which is located on the left hand side of the screen. On selecting a regional office from the list, the details of the regional office will be shown to the right of the regional offices list. This is highlighted in green in Figure 37. The regional offices list is highlighted in red in Figure 37.

5.2.4 Editing Regional Office Details

To be able to edit a regional office, you must first select the regional office in the regional offices list. This will present you with the details for the selected regional office and an *Edit* button. You must select the *Edit* button

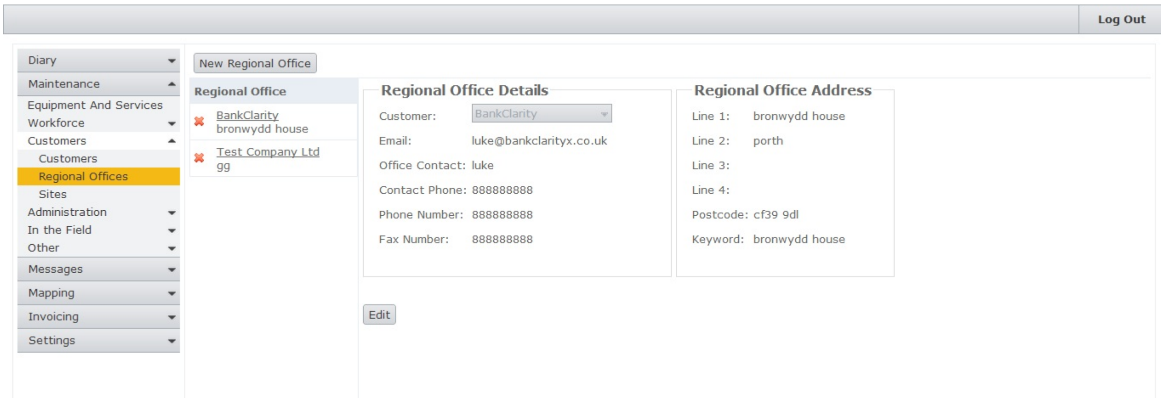

Figure 37: Regional office details (green) and regional offices list (red).

to allow changes to be made to the details. Once you have made the relevant changes to the regional office details, press the *Save* button.

5.3 Sites

When you select the *Sites* item on the navigation panel you will be presented with the sites screen. It consists of a list of sites on the left hand side of the screen and a *New Site* button. From this screen you can create new sites for the system, remove sites from the system, view the details stored for a particular site and edit site details. Each of these functions will be discussed in the following subsections.

5.3.1 Creating Sites

To create a new site, you must select the *New Site* button which is located at the top of the sites screen. On selecting the button, the form shown in Figure 38 will be presented to you. Complete the form by choosing a customer related to the site being created (not mandatory), entering a site email address, site contact name, site contact phone number, site phone number and site fax number. A site must be associated with an address and you can select an address for the site by pressing the *Select Address* button. This will bring up a window that will allow you to search through all addresses held in the system. You can also add an address if needs be. Once you have found the address for the site, select the address and press *OK*. The address details on the new site form should be filled automatically with the selected address details. Finally, save the site by pressing the *Save* button.

5.3.2 Deleting Sites

To remove a site from the system, you must first navigate to the *Sites* screen by selecting the *Sites* item under the *Customers* section of the navigation panel. On this screen you will find a list of sites on the left of the screen. Select the site in the list that you want to remove. You will then be presented with the site details, located to the right of the sites list, which also includes a *Delete* button. Pressing this button will remove the site from the system.

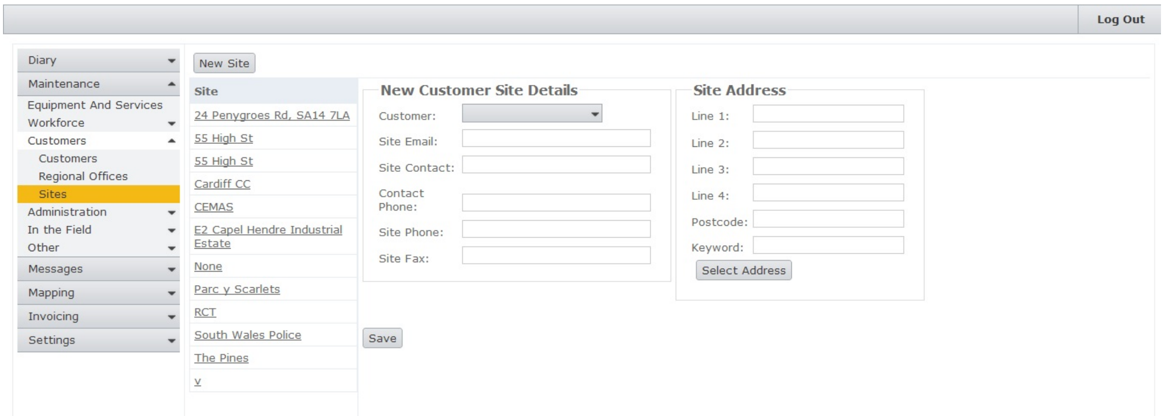

Figure 38: New site form.

5.3.3 Viewing Site Details

Once you have navigated to the *Sites* screen, you can view the details of any site that has been created. To do this, select the site you want to view the details for in the sites list, which is located on the left hand side of the screen. On selecting a site from the list, the details of the site will be shown to the right of the sites list. This is highlighted in green in Figure 39. The sites list is highlighted in red in Figure 39.

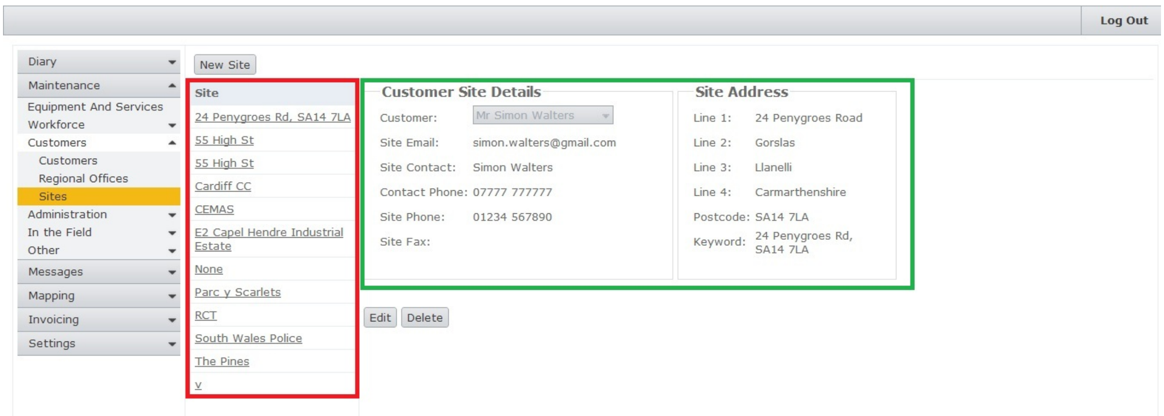

Figure 39: Site details (green) and sites list (red).

5.3.4 Editing Site Details

To be able to edit a site, you must first select the site in the sites list. This will present you with the details for the selected site and a few buttons. One of these buttons is the *Edit* button. You must select the *Edit* button to allow changes to be made to the details. Once you have made the relevant changes to the site details, press the *Save* button.

6 Administration

This section of the document covers the functionality that is provided under the *Administration* item in the *Maintenance* section of the navigation panel.

6.1 Orders

When you select the *Orders* item on the navigation panel you will be presented with the sites screen. It consists of a list of orders on the left hand side of the screen and a *New Order* button. From this screen you can create new orders for customers, remove orders from the system and view the details stored for a particular order. Each of these functions will be discussed in the following subsections.

6.1.1 Creating Orders

To create a new order, you must select the *New Order* button which is located at the top of the orders screen. On selecting the button, the form shown in Figure 40 will be presented to you. Complete the form by entering a reference order number, contact and description. You will also need to select a customer from the drop down list. On selecting a customer, the site drop down list will become enabled and filled with the sites corresponding to the selected customer. The last part of the order details section of the form requires you to select a service for the order. Once you have completed the order details section, you now have complete the order limits section of the form. Here, you can set a maximum value for the order and a maximum number of jobs for the order if required. You must choose whether the order has an end date or is open ended. Finally, save the order by pressing the *Save* button.

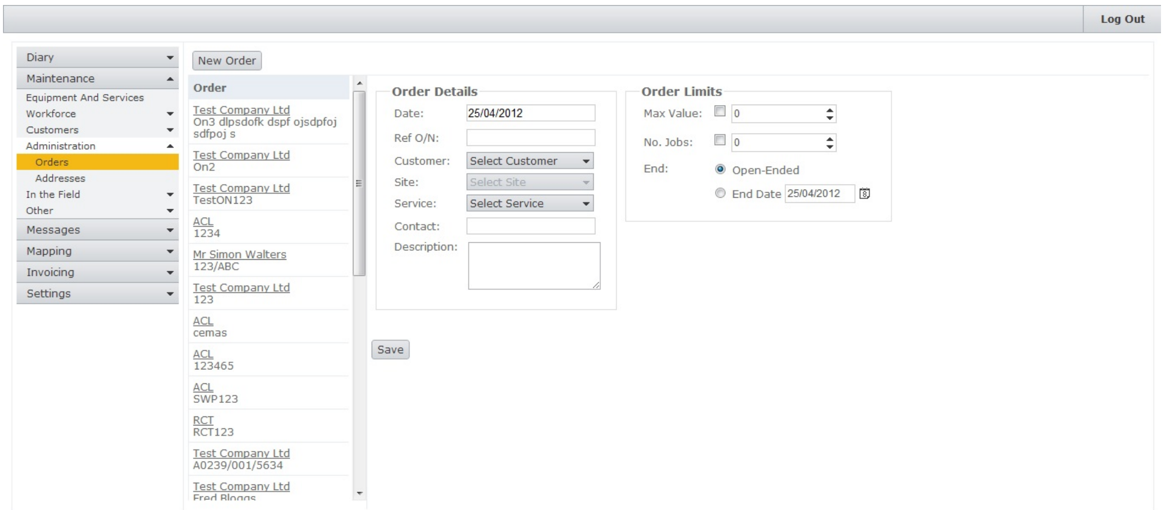

Figure 40: New order form.

6.1.2 Deleting Orders

To remove an order from the system, you must first navigate to the *Orders* screen by selecting the *Orders* item under the *Administration* section of the navigation panel. On this screen you will find a list of orders on the left of the screen. Select the order in the list that you want to remove. You will then be presented with the order details, located to the right of the orders list, which also includes a *Delete* button. Pressing this button will remove the order from the system.

6.1.3 Viewing Order Details

Once you have navigated to the *Orders* screen, you can view the details of any order that has been created. To do this, select the order you want to view the details for in the orders list, which is located on the left hand side of the screen. On selecting an order from the list, the details of the order will be shown to the right of the orders list. This is highlighted in green in Figure 41. The orders list is highlighted in red in Figure 41.

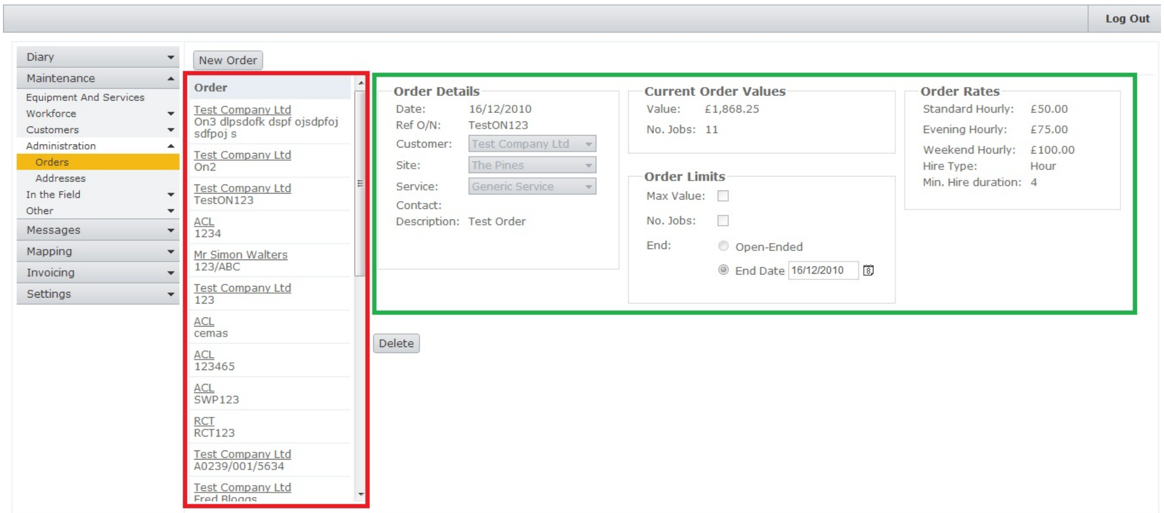

Figure 41: Order details (green) and orders list (red).

6.2 Addresses

When you select the *Addresses* item on the navigation panel you will be presented with the addresses screen. It will initially consist of two buttons. From this screen you can manage all the addresses held in the system. This includes tasks like editing address details, deleting addresses and creating new addresses.

The first button on the screen, *View All*, will display all the addresses that are present in the database. If you select an address in the grid you will be shown a list of all the entities that are associated with that address. This is shown in Figure 42

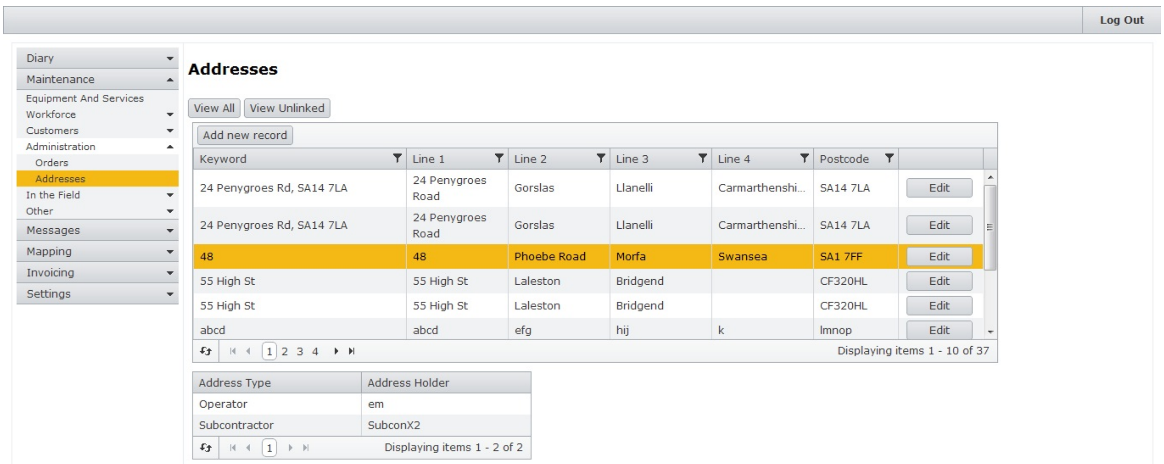

Figure 42: The address screen showing the address grid and the address-entity links.

The second button on the screen, *View Unlinked*, will display all the addresses that are present in the database and that are not associated with any entities in the system. It is only from this grid that you can delete an address as it is not linked with anything else in the system. To delete an address, press the *Delete* button next to the address you want to remove.

It is possible to edit the details of an address from either grid. To do this, press the *Edit* button next to the address you want to edit. You will then be presented with a form, in which you can update the address details. When you have made the relevant changes press the *Update* button and your changes will be saved. Alternatively you can press the *Cancel* button to return to the address grid without your changes being saved.

As well as editing an address, you can also add an address from either grid. To do this, press the *Add New Record* button at the top of the grid. You will then be presented with a form, in which you can enter the address details. When you have completed the form, press the *Insert* button and the address will be added to the system. Alternatively you can press the *Cancel* button to return to the address grid without the address being added to the system.

You can also set a filter on each column of the grid by selecting the filter button, which looks like a funnel. It is also outlined in red in Figure 43.

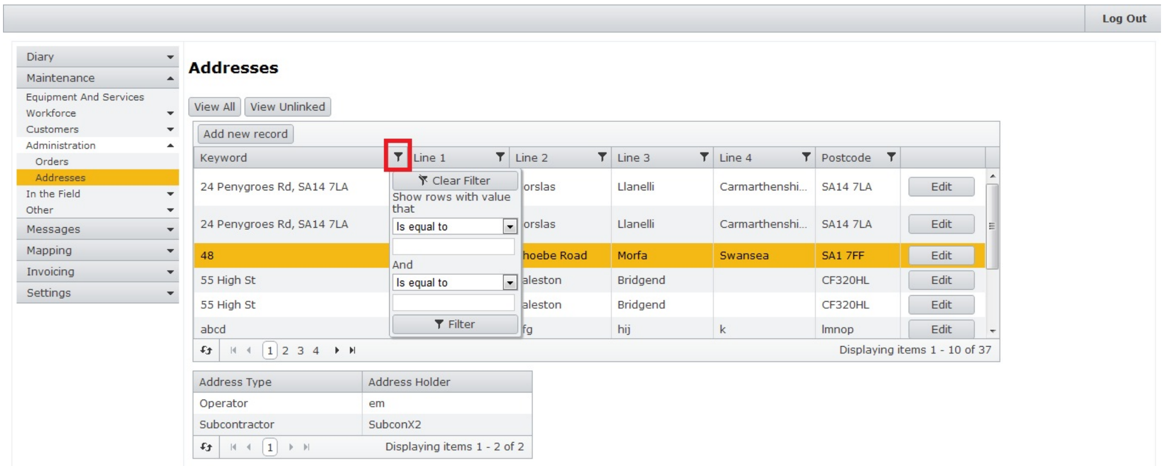

Figure 43: Location of the filter button on the address grid.

7 In the Field

This section of the document covers the functionality that is provided under the *In the Field* item in the *Maintenance* section of the navigation panel.

7.1 Devices

When you select the *Devices* item on the navigation panel you will be presented with the devices screen. It consists of a list of devices on the left hand side of the screen and a *New Device* button. From this screen you can create new devices, remove devices from the system, edit device details and view the details stored for a particular order. You can also assign a device to an operator from this screen. Each of these functions will be discussed in the following subsections.

7.1.1 Creating Devices

To create a new device, you must select the *New Device* button which is located at the top of the devices screen. On selecting the button, the form shown in Figure 44 will be presented to you. Complete the form by entering a device number, phone number, purchase date, make, model and ID code for the device. Ideally the device number and ID code should be the same. You must also state the status of the device which can either be available or unavailable. Optionally, you can allocate an operator to the device by selecting the operator from the *Assigned Operator* drop down list. Finally, save the device by pressing the *Save* button.

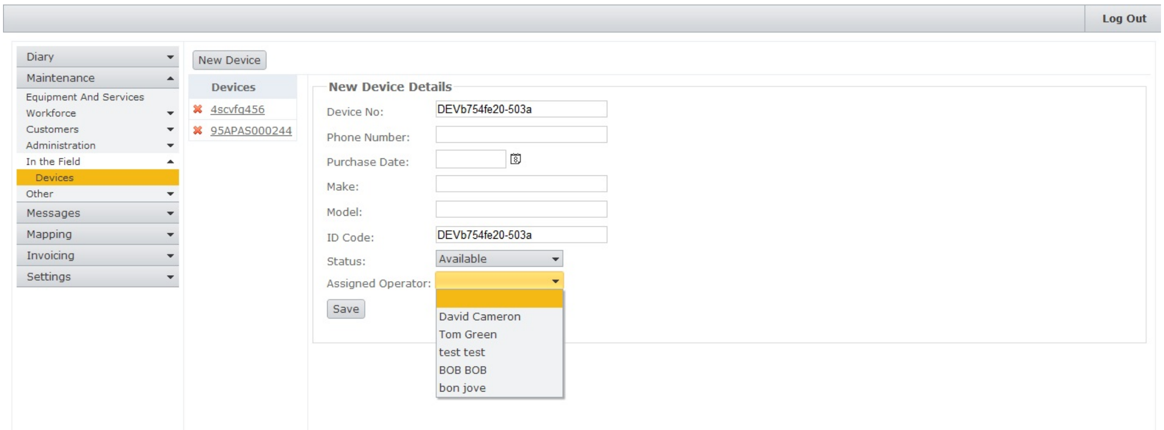

Figure 44: New device form.

7.1.2 Deleting Devices

To remove a device from the system, you must first navigate to the *Devices* screen by selecting the *Devices* item under the *In the Field* section of the navigation panel. On this screen you will find a list of devices on the left of the screen, each of which has a red cross next to it. Pressing the cross will remove the device from the system.

7.1.3 Viewing Device Details

Once you have navigated to the *Devices* screen, you can view the details of any device that has been created. To do this, select the device you want to view the details for in the devices list, which is located on the left hand side of the screen. On selecting a device from the list, the details of the device will be shown to the right of the devices list. This is highlighted in green in Figure 45. The devices list is highlighted in red in Figure 45.

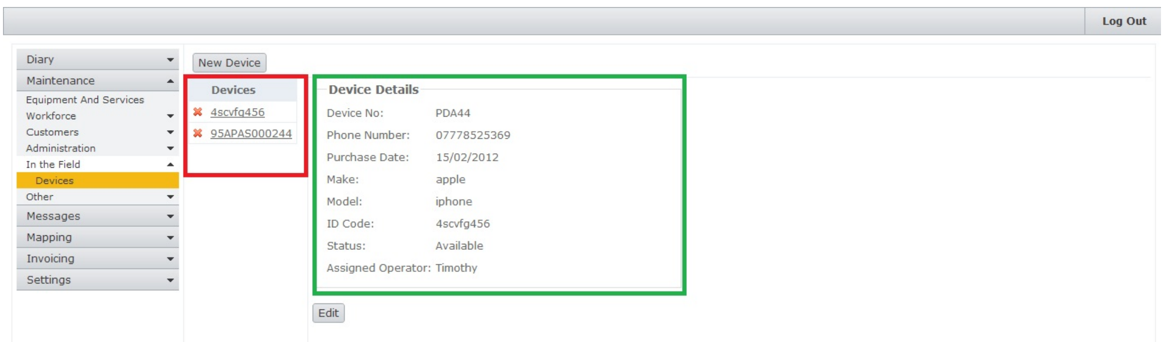

Figure 45: Device details (green) and devices list (red).

7.1.4 Editing Device Details

To be able to edit a device, you must first select the device in the devices list. This will present you with the details for the selected device and an *Edit* button. You must select the *Edit* button to allow changes to be made to the details. Once you have made the relevant changes to the device details, press the *Save* button.

7.1.5 Allocating Devices to Operators

To allocate a device to an operator, firstly select the device in the devices list. Now press the *Edit* button to enable changes to be made to the devices details. At the bottom of the edit details form you will find a drop down list filled with all the operators held in the system. Select one of the operators and press the *Save* button. The device will now be allocated to the selected operator.

8 Other

This section of the document covers the functionality that is provided under the *Other* item in the *Maintenance* section of the navigation panel.

8.1 Jobs Requiring Signatures

When you select the *Jobs Requiring Signatures* item on the navigation panel you will be presented with the jobs requiring signatures screen, shown in Figure 46. Included on the screen is a grid of jobs, all of which are finished and do not have signature recorded against them (and have not already been send for a signature). There are also two buttons which allow you to send jobs to an operator to collect a signature for them and marking jobs as not requiring a signature.

To send jobs to an operator so they can collect a signature for them, firstly select the jobs in the grid that you want to send to the operator. Next, select the operator in the *Send Jobs for Signature* section and then press the *Send Selected Jobs* button.

If you want to mark jobs as not requiring a signature, firstly select the jobs in the grid that you want to mark as not requiring a signature. Then press the *Mark Jobs as Not Requiring Signature* button in the *Save Jobs as Not Requiring Signature* section of the screen.

9 Mapping

When operators using Glimpse Mobile are equipped with GPS enabled PDAs/devices, GPS points are captured while the operators are logged in and sent back to the database. The Mapping section of Glimpse Web provides a number of ways to work with addresses and GPS information. This section of the document covers the functionality that is provided under the *Mapping* section of the navigation panel. Initially, tracking resources will be discussed and then GPS coordinates rating to jobs. The final sections concentrate on where a user has logged in or out of their device and GPS information stored about addresses.

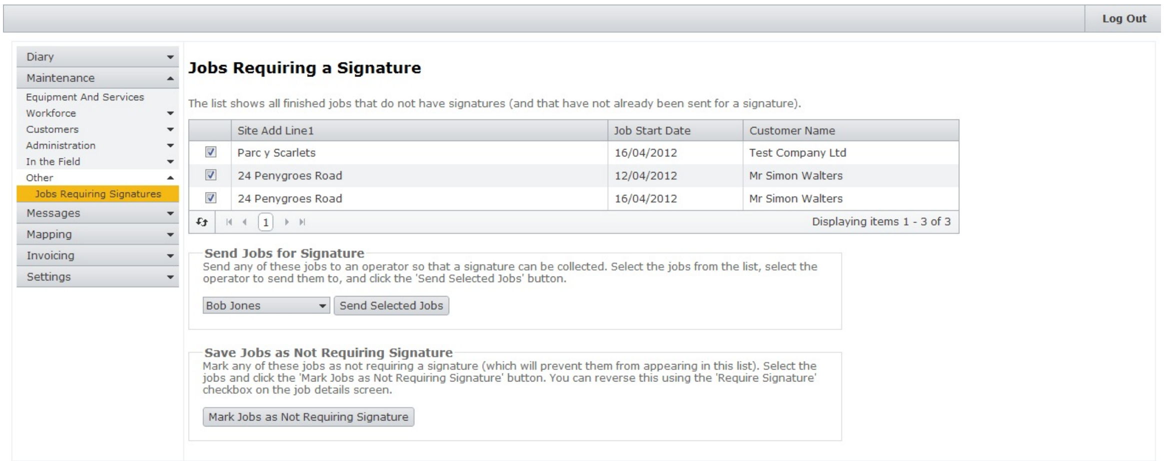

Figure 46: Jobs requiring signatures screen.

9.1 Tracking Resources

Under the *Track* item of the *Mapping* section in the navigation panel, there are two options that can be selected. These allow you to track operators and plant items. Both choices will open very similar screens, consisting of a toolbar to the left of the screen and the remaining is consumed with a Google Map. The toolbar is shown in Figure 47

If you want to track one operative or one item of plant, you can either request the operative/plant items most recent position or tracking information between certain dates. You can choose this by selecting the relevant radio button at the top of the toolbar. If you want to request GPS information between certain dates, then you should specify the dates in the fields provided. You must then select the operative/plant item you want track from the drop down list at the bottom of the first section of the toolbar. Now press the *Track* button and the map, along with the GPS coordinates will be displayed to the right of the toolbar.

Alternatively, you can track all operatives or plant items by using the second section of the toolbar, titled *Track All*. This section allows you to retrieve the last known position or the current position of each operative/plant item in the system. Increasing the value in the *Up to* box forces the system to accept older positional data as current.

Tracking a plant item or operative will present you with a screen that is similar to the one shown in Figure 48. Selecting one of the markers on the map will shown more information about that particular marker.

9.2 Job Route

Included under the *Mapping* section of the navigation panel is an item titled *Job Route*. Selecting this item will provide you with the ability to view GPS information relating to a particular job.

When you first navigate to the *Job Route* screen you will be presented with a grid at the bottom of the screen. The grid is filled with all the jobs in the system. As it is likely that there will be a considerable amount of jobs, the grid allows you to filter the jobs on job id, booked date, site keyword, operator name and plant registration. To filter the jobs press the icon that looks like a funnel and you will be presented with a filter form. This is shown in Figure 49.

When you have found a job, that you want to view the associated GPS coordinates of, simply select the job in the list. On selecting the job all the GPS coordinates will be shown on a Google Map above the grid. An

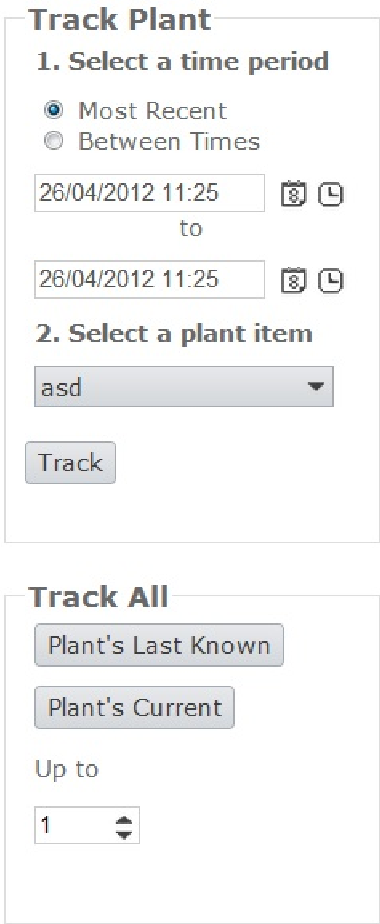

Figure 47: Track resource toolbar.

example of this is shown in Figure 50.

9.3 Operator Logs

Included under the *Mapping* section of the navigation panel is an item titled *Logs*. Selecting this item will provide you with the ability to view GPS information relating to where an operative has logged in and logged out of their mobile device. The tool bar on the left of the screen allows the user to select the log type, the operator to be viewed and the date range. The screen is shown in Figure 51

9.4 Addresses

Included under the *Mapping* section of the navigation panel is an item titled *Addresses*. This screen provides a way of viewing the location of an address in the system provided they have been associated with GPS coordinates. When you first navigate to the *Addresses* screen you will be presented with a grid at the bottom of the screen. The grid is filled with all the addresses in the system. As it is likely that there will be a considerable amount of addresses, the grid allows you to filter the addresses on each aspect of an address. To filter the addresses press the icon that looks like a funnel and you will be presented with a filter form.

Once you have found the address you want to view the location of, select the address in the grid. On selecting the address, its location will be shown on a Google Map above the grid, provided it has been associated

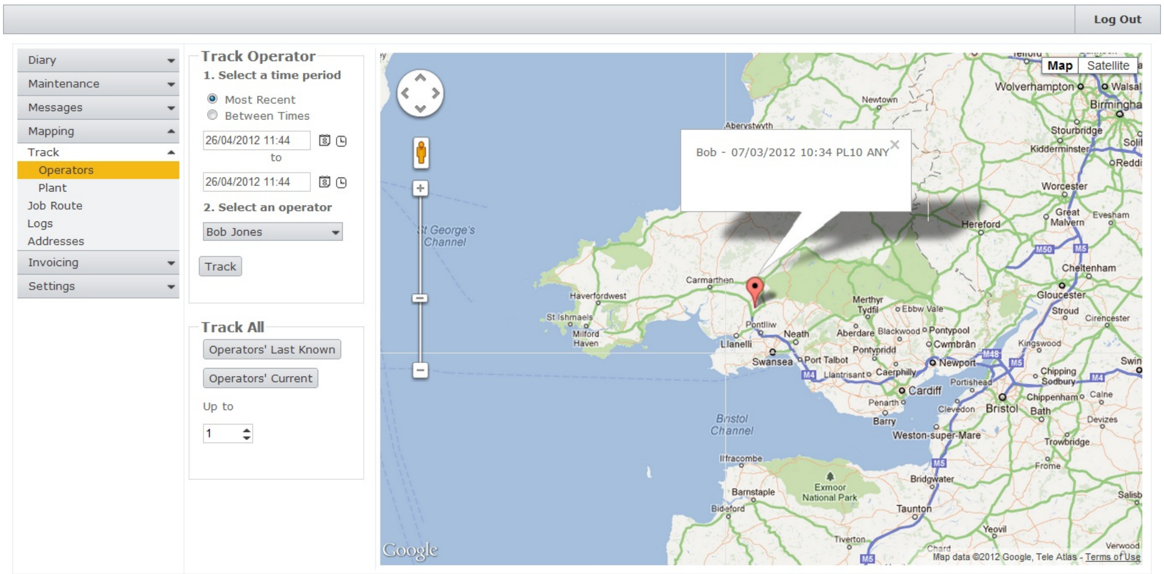

Figure 48: Resource tracking screen with map and marker information displayed.

Figure 49: Grid on the *Job Route* screen which is filled with jobs and the filter opened.

with GPS coordinates.

10 Invoicing

This section of the document covers the functionality that is provided under the *Invoicing* section of the navigation panel. This includes how to find jobs to invoice, how to create an invoice and finding an invoice that has been created. It also describes how to register payments for an invoice.

10.1 Finding Jobs to Invoice

Included under the *Invoicing* section of the navigation panel is an item titled *Find Jobs To Invoice*. This screen lists all jobs that are finished and where required, have a digital signature recorded. The jobs can be sorted by any of the columns making it easy to select groups of jobs for invoicing together. A convention adopted in Glimpse is that only jobs that share an order number can appear on the same invoice.

At the bottom of the screen are two buttons with the following functions:

- Mark as Invoiced Marks the selected jobs as invoiced. Use this when jobs do not need to have an invoice raised.

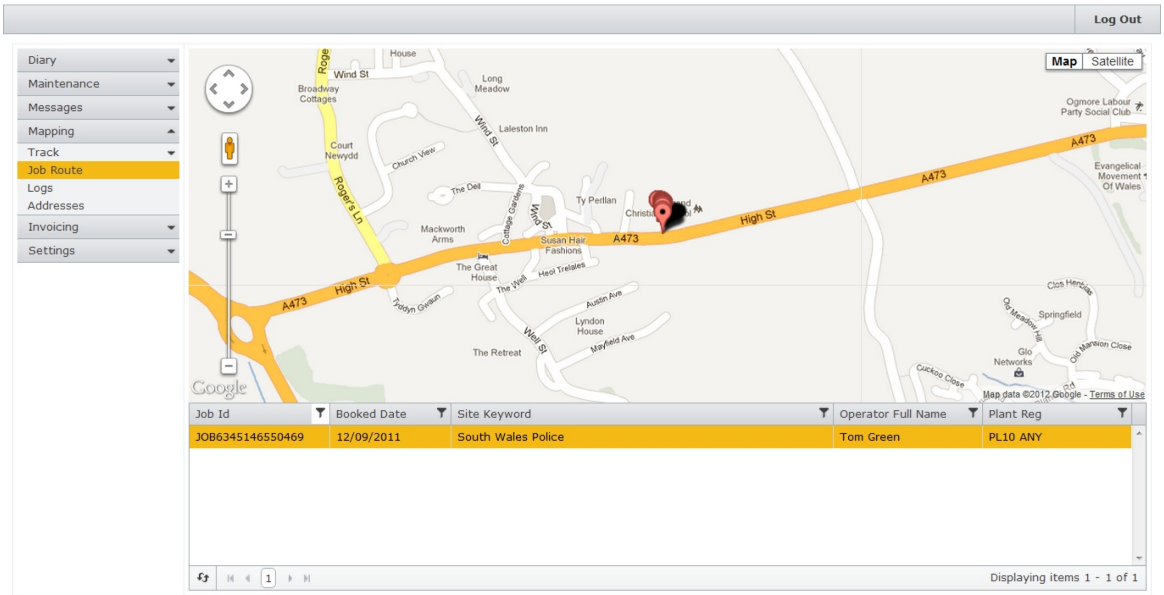

Figure 50: Job route screen with GPS coordinates of a job marked on the map.

- Create Invoice for Selected Jobs This button opens the invoice details screen with all the marked jobs (if appropriate) on one invoice.

10.2 Creating an Invoice

To create an invoice for a job or multiple jobs, firstly navigate to the *Finding Jobs To Invoice* screen. Now select the jobs from the list you want to create an invoice for. Once you have selected all the jobs you want to invoice, press the *Create Invoice for Selected Jobs* button and you will be directed to the invoice details screen. On this screen you can add discount to the invoice and write comments against the invoice. When you have any discount and comments, press the *Save* button and the invoice will be created. The invoice details screen is shown in Figure 52 with the items that you can edit outlined in red.

10.3 Finding an Invoice

To find an invoice that has been created, you can navigate to the *Find Invoice* screen. This can be found under the *Invoicing* section of the navigation panel. You will then be presented with the search box shown in Figure 53. You can either enter an invoice number directly into the search box or you can choose an invoice from a list of all the invoices held in the system. To select an invoice from a list, press the magnifying glass next to the search box. You will then be presented with a grid filled with invoices, in which you can apply filters to make finding the invoice you require easier. When you have found the invoice, select it and then press the *Close* button. The invoice number for the selected invoice will be automatically placed in the search box. To view the invoice details press the *View Invoice* button.

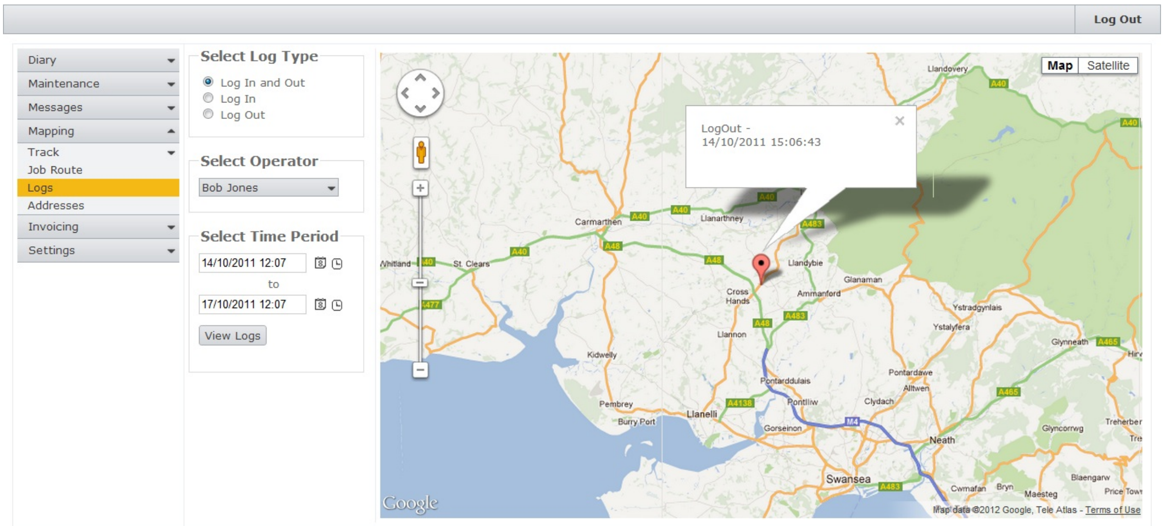

Figure 51: Operator log screen.

10.4 Register Invoice Payments

The *Register Payments* screen can be found under the *Invoicing* section of the navigation panel. It allows payments to be allocated to invoices. You can either enter an invoice number directly into the search box or you can choose an invoice from a list of all the invoices held in the system. To select an invoice from a list, press the magnifying glass next to the search box. You will then be presented with a grid filled with invoices, in which you can apply filters to make finding the invoice you require easier. When you have found the invoice, select it and then press the *Close* button. The invoice number for the selected invoice will be automatically placed in the search box. To view the invoice details and any payments for the invoice press the *View Payments* button. This screen is shown in Figure 54

On this screen you can add, edit and delete payments for a particular invoice. To add a payment, press the *Add new record* button, which is located to the top of the payments grid. You will then be presented with a form in which you will have to supply an amount, date paid and payment reference for the payment. Press the tick button to save the payment or the cross button to cancel adding the payment.

To edit a payment, press the edit button next to the relevant payment record. You will be presented with a form in which you can edit the details of the record. When you have made the required changes, press the tick button to save the changes or the cross button to cancel any changes you have made.

If you want to delete a payment record, press the delete button next to the relevant payment record in the grid.

11 Messaging

The messaging section of the application allows you to send messages to operatives in the field and receive messages from the operatives. It also provides a way of viewing all of the messages you have sent and received. As well as this, it is possible to delete a message. Each of these functions is discussed in the following sections.

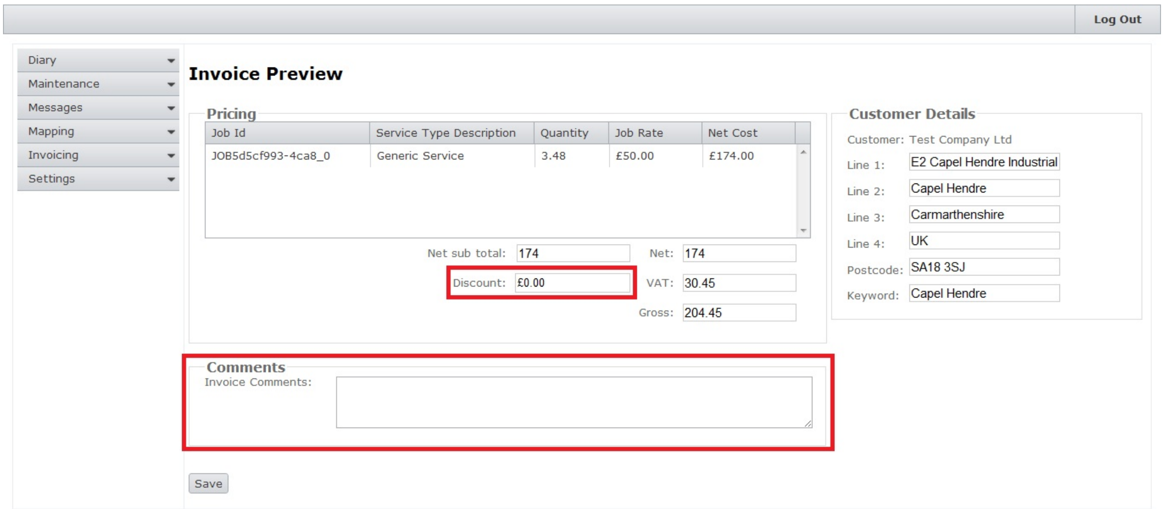

Figure 52: New invoice details screen.

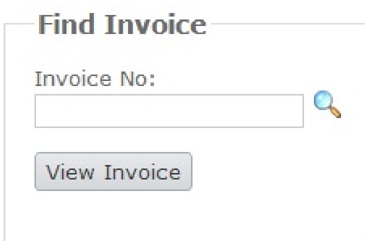

Figure 53: Invoice search box.

11.1 Send Message

To send a message to operators, navigate to the *New Message* screen by selecting the *New Message* item in the *Messaging* section of the navigation panel. This will then display the form shown in Figure 55

First, select the operators you wish to send the message to by checking the checkbox next to their name. Once you have done this, type your message in the box to the right of the operator names and press *Send*.

11.2 Viewing Messages

You can view messages that you have sent by selecting *Outbox* in the *Messaging* section of the navigation panel. This will display a list of messages that you have sent. If you want to view all the messages that have been sent to you then you must select the *Inbox* item on the navigation panel. This will display a list of messages that have been sent to you.

If you select a message from the list of inbox or outbox messages, the message details will be shown below the list of messages. This is shown in Figure 56.

11.3 Delete Message

To delete a message press the button highlighted in Figure 57 which is next to the message you want to delete.

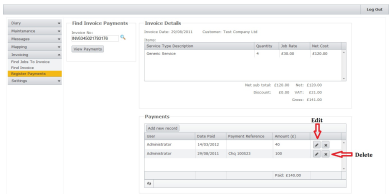

Figure 54: Invoice payments screen.

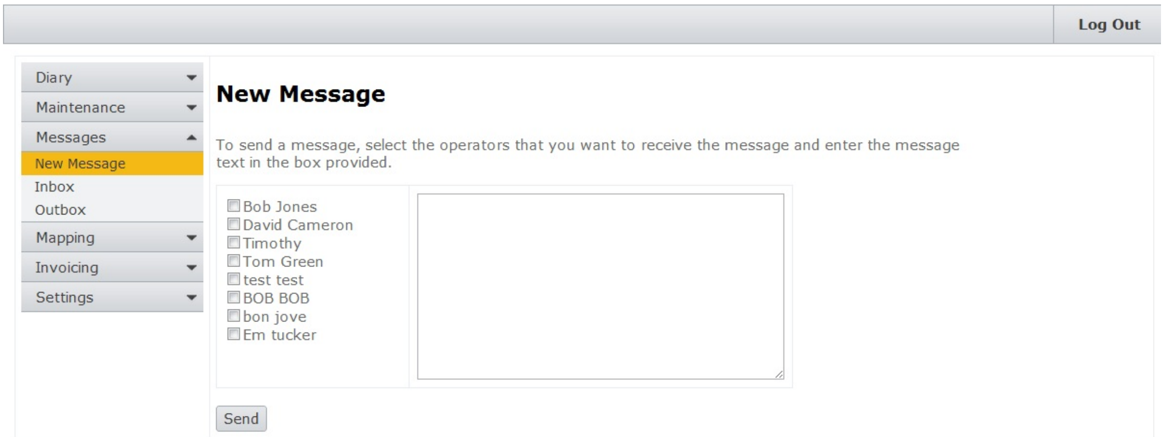

Figure 55: New message screen.

12 Settings

The settings section of the application allows you to manage most of the options of the system. This includes the company or organisation details, VAT rate, job durations and boundaries and hints and warnings for plant items. Each will be discussed in the following sections.

12.1 Company Details

The first item in the *Settings* section of the navigation panel is titled *Company Details*. On this screen you can edit the company or organisation details for the company using the system. You can also change the VAT rate on this screen. To make changes to these details, simply change the details on the screen and then press the *Apply* button. Your changes will then be saved.

12.2 Job

The *Job* item under the *Settings* section of the navigation panel allows you to set minimum and maximum job durations. You can also set the boundaries for evening and weekend work. This can be done by making the required changes to the details on the screen and then pressing the *Apply* button.

12.3 Plant Hints and Warnings

The *Hints and Warnings* item under the *Settings* section of the application allows you to run a check on plant items held in the system. You can run a check that checks if the MOT date, road tax date, service date or check dates are within the number of weeks warning. It is possible to run a check against any combination of the

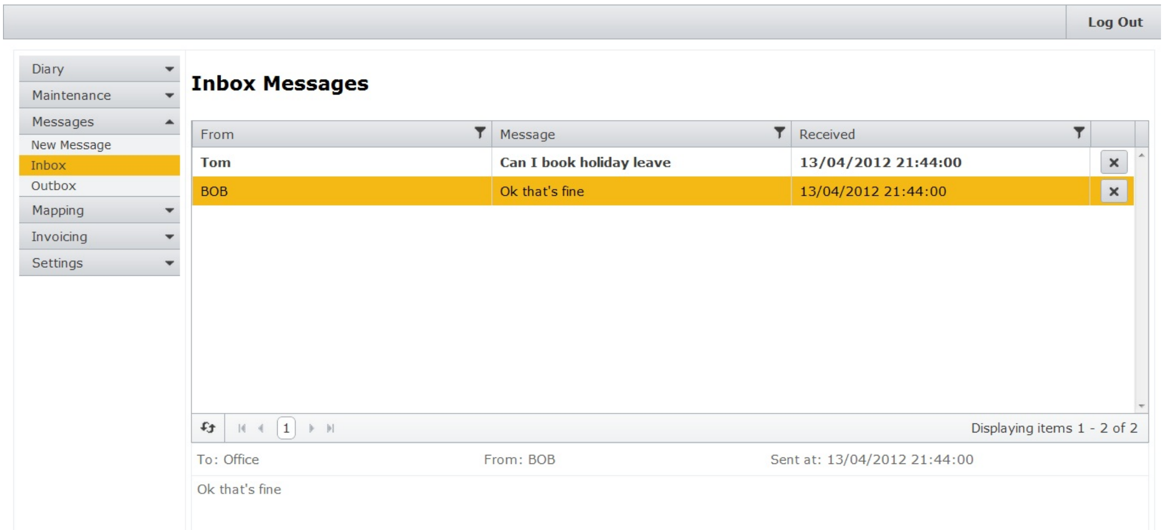

Figure 56: Inbox messages with a message selected displaying its details at the bottom of the screen.

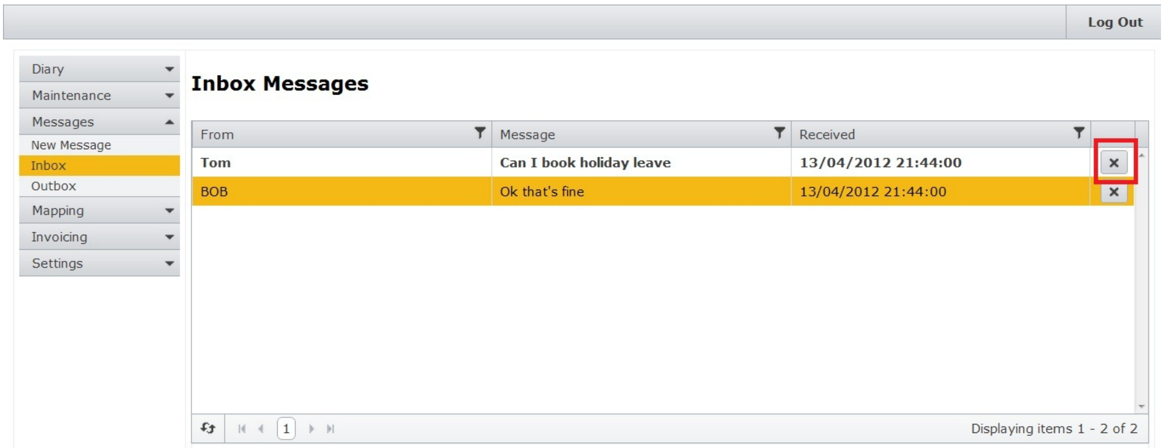

Figure 57: Delete message button highlighted in red.

dates and you can specify the number of weeks warning in the corresponding box. Pressing the *Run Warning Check* button will perform the check and return a list of items that satisfy the check criteria.