

# Gold Service

## Instruction Manual – Job View and Multi Authorisation

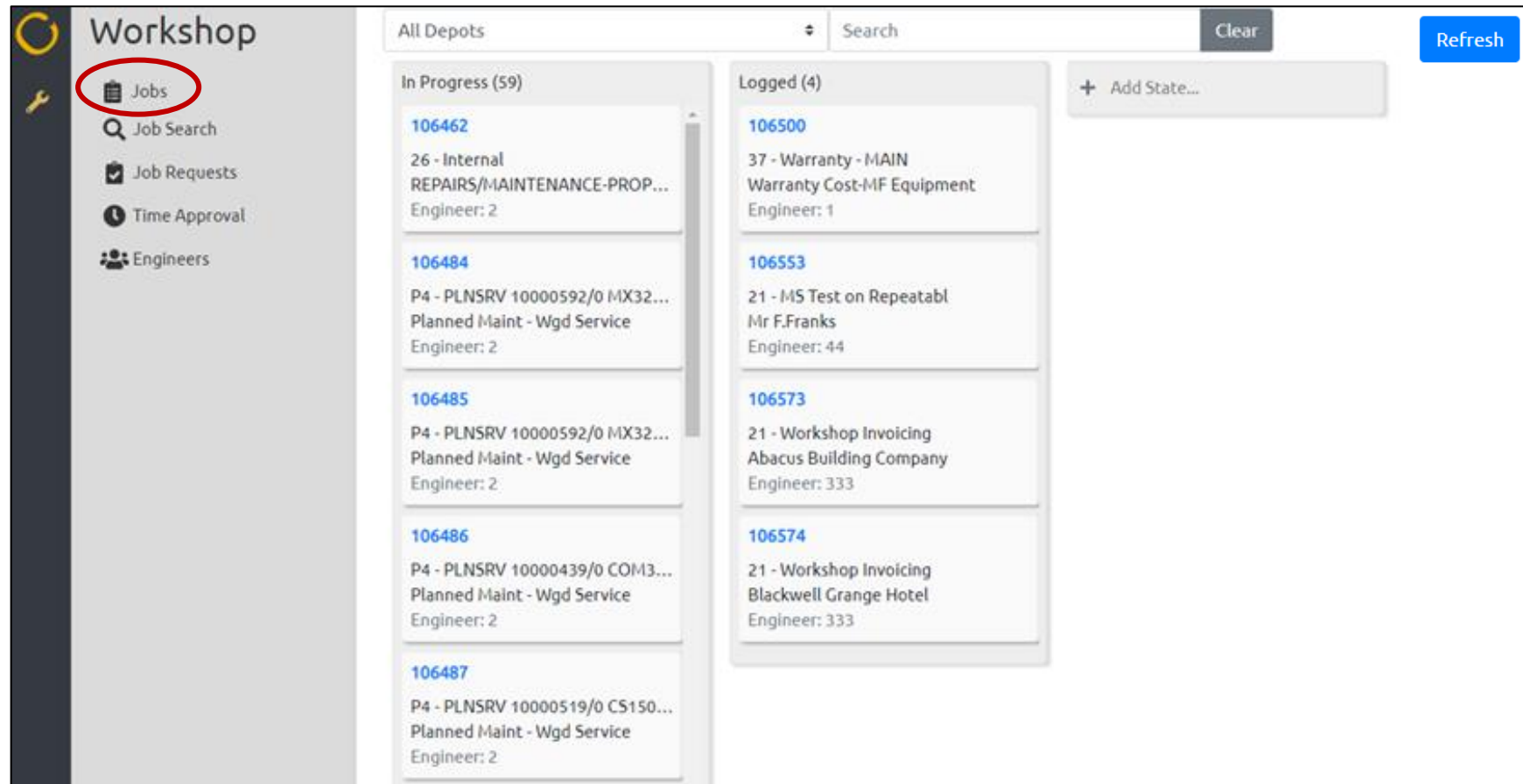
**Version 0.1**  
**9<sup>th</sup> June 2022**

# Contents

A new view of the Job Screen in the Portal.....	3
Searching and filtering .....	4
Viewing job information .....	5
Overview of the Multi Authorisation Feature .....	6
What is it and how does it work? .....	6
Will it work for me?.....	6
How do I use the Multi Authorisation Feature?.....	7
Adding Columns.....	7
Renaming and Deleting Columns.....	8
Moving Columns .....	8
Moving Jobs through the authorisation flow .....	8
Audit History.....	9

## A new view of the Job Screen in the Portal

When you upgrade to v7.21 of Gold, you will see a new view within the jobs section of the Portal. Instead of rows of jobs, you will see columns of jobs, and you will notice that the 'In Progress' and 'Logged for Checking' tabs have disappeared. This change has been implemented to allow you to see all the jobs on one page, removing the need to switch between the different Tabs. You can now minimise the left-hand menu by pressing the triangle that appears when you hover over it. Here is an example of this new view:



## Searching and filtering

You can search for jobs by using the search bar, and filter on depots by using the drop-down list. Both items can be found at the top of the screen. To clear the data, use the 'clear' button.

When you use the search or filter function, it will reduce the amount of jobs in the columns based on the criteria used. When this happens, you will notice that the 'counter' at the top of each column will change to reflect the number of jobs remaining.

The screenshot shows the 'Workshop' interface with a sidebar on the left containing navigation options: Jobs, Job Search, Job Requests, Time Approval, and Engineers. The main area is divided into two columns: 'In Progress (59)' and 'Logged (4)'. A red circle highlights the '(59)' counter in the 'In Progress' column. A search bar and a 'Clear' button are located at the top right of the main area. Below the search bar is an 'Add State...' button.

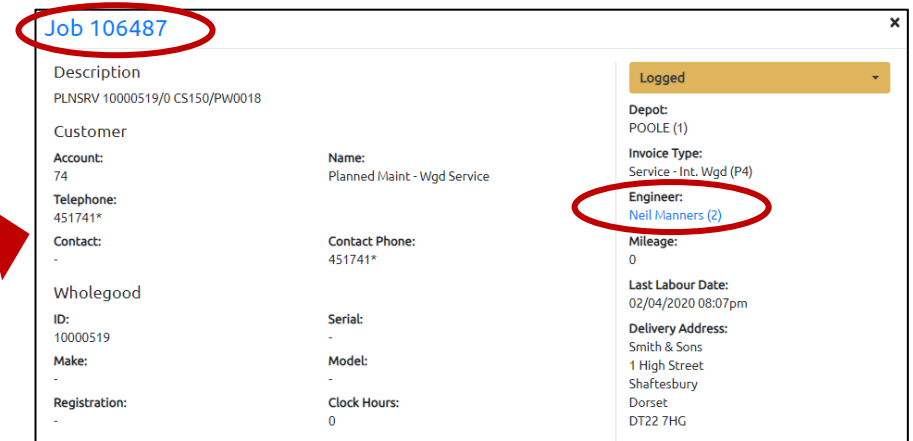
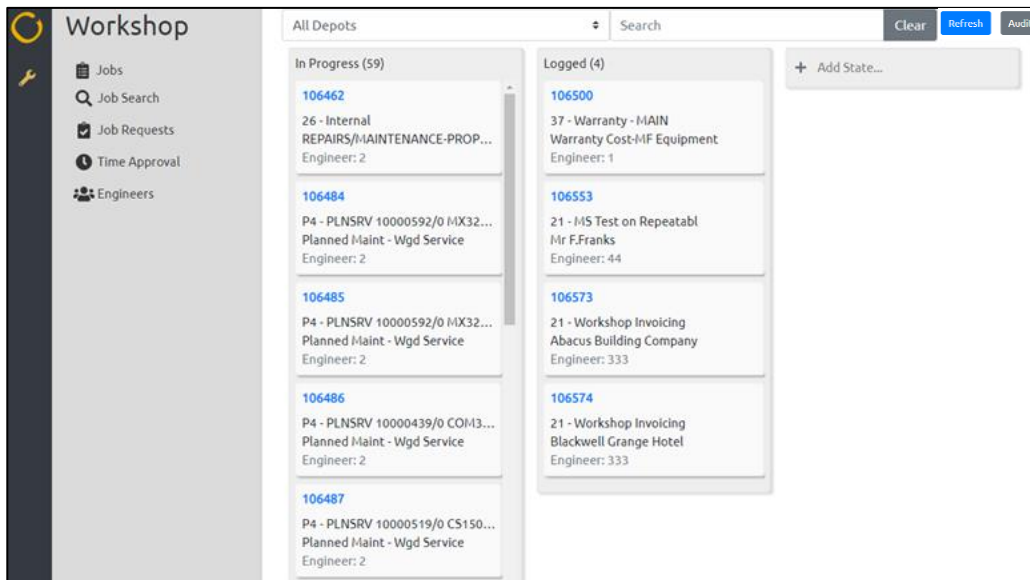
In Progress (59)	Logged (4)
<b>106462</b> 26 - Internal REPAIRS/MAINTENANCE-PROP... Engineer: 2	<b>106500</b> 37 - Warranty - MAIN Warranty Cost-MF Equipment Engineer: 1
<b>106484</b> P4 - PLNSRV 10000592/0 MX32... Planned Maint - Wgd Service Engineer: 2	<b>106553</b> 21 - MS Test on Repeatabl Mr F.Franks Engineer: 44
<b>106485</b> P4 - PLNSRV 10000592/0 MX32... Planned Maint - Wgd Service Engineer: 2	<b>106573</b> 21 - Workshop Invoicing Abacus Building Company Engineer: 333
<b>106486</b> P4 - PLNSRV 10000439/0 COM3... Planned Maint - Wgd Service Engineer: 2	<b>106574</b> 21 - Workshop Invoicing Blackwell Grange Hotel Engineer: 333
<b>106487</b> P4 - PLNSRV 10000519/0 CS150... Planned Maint - Wgd Service Engineer: 2	

## Viewing job information

Our new 'Quick View' feature allows you to view more information on the job, without having to leave the page. To use the quick view feature, simply click anywhere on the job card (except the job number) and it will appear on the screen.

It will display the job description, customer and delivery details, Wholegood data, depot, invoice type, mileage and engineer information. It will also show you the last labour date of the job.

You can click on the engineer's name to open the engineer's details screen, or you can click on the job number and it will open the job in full. To close the quick view and return to the jobs screen, click on the cross in the top right-hand corner.



# Overview of the Multi Authorisation Feature

## What is it and how does it work?

Multi Authorisation is the term used to refer to the process of having more than one person check a job in the Portal, before it is invoiced.

Each customer has a different process for approving jobs. We have designed a feature that can be uniquely configured to ensure it works for everyone. To take advantage of the Multi Authorisation Feature, you simply need to create columns to mirror the flow of your unique process.

The example below shows a simple flow of departments required to authorise a job:



With this simple process flow in mind, your jobs page would look like this:

The screenshot shows a 'Workshop' interface with a sidebar on the left containing 'Jobs', 'Jobs (New View)', 'Job Search', 'Job Requests', 'Time Approval', and 'Engineers'. The main area displays a grid of job cards under the heading 'All Depots'. The jobs are organized into columns based on their department:

- In Progress (55):**
  - 106462: 26 - Internal REPAIRS/MAINTENANCE-PROP... Engineer: 2
  - 106484: P4 - PLNSRV 10000592/0 MX32... Planned Maint - Wgd Service Engineer: 2
  - 106485: P4 - PLNSRV 10000592/0 MX32... Planned Maint - Wgd Service Engineer: 2
- Logged (3):**
  - 106487: P4 - PLNSRV 10000519/0 CS150/P... Planned Maint - Wgd Service Engineer: 2
  - 106497: 21 - Workshop Invoicing Mr. T. N. Franks, Engineer: 1
  - 106573: 21 - Workshop Invoicing Abacus Building Company Engineer: 333
- Service Department (2):**
  - 106489: 21 - Workshop Invoicing Mr A Accumulate Engineer: 2
  - 106553: 21 - MS Test on Repeatabl Mr F.Franks Engineer: 44
- Parts Department (2):**
  - 106574: 21 - Workshop Invoicing Blackwell Grange Hotel Engineer: 333
  - 106491: 37 - Warranty - MAIN Warranty Cost-MF Equipment Engineer: 2
- Admin Department (1):**
  - 106500: 37 - Warranty - MAIN Warranty Cost-MF Equipment Engineer: 1

Additional UI elements include a search bar, a 'Clear' button, and 'Refresh' and 'Audit' buttons in the top right corner.

## Will it work for me?

Not everyone will want more than one level of authorisation within the Portal. You can still use the new views without taking advantage of the Multi Authorisation Feature.

# How do I use the Multi Authorisation Feature?

## Adding Columns

To allow more than one person to authorise a job in the Portal, you will need to create your authorisation columns. To do this, click on the 'Add State' button. This will open a text box and allow you to write the name of the column. Click 'Add State' and you will see your column appear.

The image displays two screenshots of the iBCOS Workshop interface, illustrating the process of adding a new authorisation column.

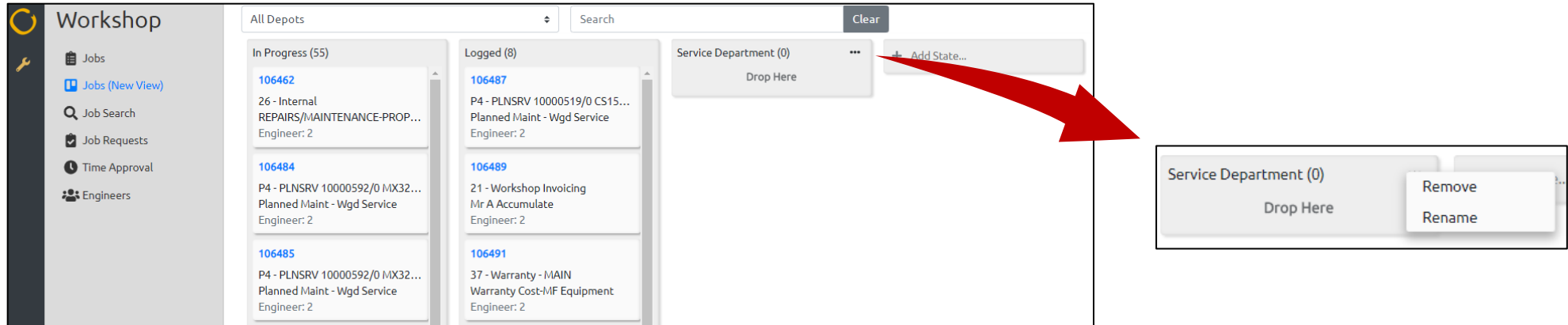
**Top Screenshot:** The interface shows a sidebar with navigation options (Jobs, Job Search, Job Requests, Time Approval, Engineers) and a main area with 'All Depots' and a search bar. There are two columns: 'In Progress (55)' and 'Logged (8)'. A red arrow points to the '+ Add State...' button in the top right corner.

**Bottom Screenshot:** The interface is the same, but now a third column, 'Service Department (0)', has been added. A red arrow points to the '+ Add State...' button, which is now highlighted.

**Inset Window:** A separate window shows a text input field containing 'Service Department' and a blue 'Add State' button. A red arrow points from the '+ Add State...' button in the top screenshot to this inset window.

## Renaming and Deleting Columns

Should you want to rename or delete a column, you can do so by clicking on the 3 dots located at the top right-hand side of the column. A pop up will appear allowing you to choose to remove or rename the column.



## Moving Columns

You may decide on a change to the flow of your process. You can move a column by simply selecting it, dragging it to its new position and dropping it in place.

## Moving Jobs through the authorisation flow

As soon as a job has been marked as logged for checking, it will move out of the 'In Progress' column, and into the 'Logged' column. From here, you can move the job to any of the columns to allow the next person to check it. To move a job, simply drag it and drop it into the desired column.

### Did you know?



Anyone is able to move jobs or columns within the Portal. It is recommended that you nominate a few members of staff to oversee the use of the Portal and the multi authorisation functionality to ensure its governance.

Please note, iBCOS are unable to recommend what processes you should implement when using the Multi Authorisation feature, but we do strongly suggest you start with a very simple process of no more than 3 or 4 authorisation columns.



## Audit History

The Audit button (located to the top right-hand side of the screen) will provide an overview of who has made changes to this view from the past 7 days. This includes any changes from moving jobs through the process flow, to moving, renaming or deleting columns.

When you click on the Audit button, it will open the Audit Screen. From this screen, you will be able to search for specific items within the Audit by using the search functions located at the top of the screen. Search for items relating to key words, or against a particular user or set of dates.

The screenshot shows the 'Workshop' interface with a sidebar on the left containing 'Jobs', 'Jobs (New View)', 'Job Search', 'Job Requests', 'Time Approval', and 'Engineers'. The main area displays job cards grouped by department: 'In Progress (55)', 'Logged (3)', 'Service Department (2)', 'Parts Department (2)', and 'Admin Department (1)'. Each card shows a job ID, description, and assigned engineer. In the top right corner, there are 'Refresh' and 'Audit' buttons, with the 'Audit' button circled in red.



The 'Job State Audit' window features search filters for 'Search', 'User', 'From' (09/01/2020), and 'To' (09/04/2020). The audit log contains the following entries:

User	Timestamp	Action	Status
EH	31/03/2020 04:19pm	Deleting job state	This audit line has been altered.
EH	31/03/2020 04:18pm	Deleting job state	This audit line has been altered.
EH	31/03/2020 04:18pm	Deleting job state	This audit line has been altered.
EH	31/03/2020 04:18pm	Deleting job state	This audit line has been altered.
EH	31/03/2020 04:18pm	Updating job sub-state to 'Logged'	This audit line has been altered.
EH	31/03/2020 04:18pm	Updating job sub-state to 'Logged'	This audit line has been altered.
EH	09/04/2020 03:41pm	Moving job state 'Admin'	
EH	09/04/2020 03:41pm	Moving job state 'Admin'	



### Did you know?

When you select the Audit tab, the screen will only show the previous 7 days' worth of data. If you want to see data from before the last 7 days, you will need to use the search and filter function to the left-hand side of the screen.