



web based solutions

Que Centre 2.0 Administrator's Manual

Rev 4/19/2013

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System Management

Additions, changes and deletions to administrative tasks are carried out in System Management

User Management

Create a new user Group

- Click on System button
- Hover mouse over User Management
- Hover mouse over Users Groups
- Click on User Group

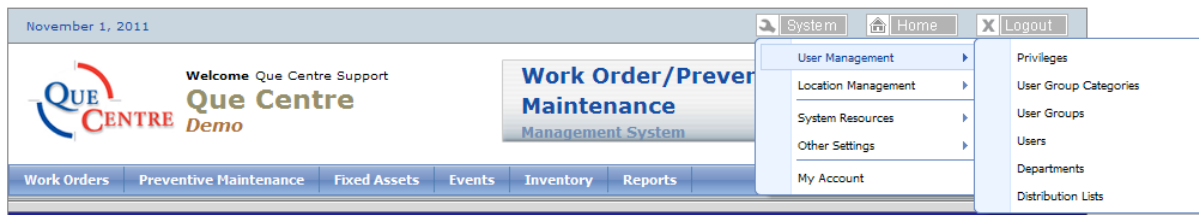


Figure 1 System Management

The list of User Groups is displayed

The screenshot shows the 'User Management' section of the Que Centre Management System. The date is November 16, 2011. The main header includes the Que Centre logo and the text 'Welcome Que Centre Support Que Centre Demo'. A navigation menu contains 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. The 'User Management' section is active, and a table of User Groups is displayed. The table has columns for 'Group Name', 'Category Name', 'Description', 'Delete', and 'Block'. A 'Create New User Group' button is visible at the top left of the table. A 'Show Deleted' checkbox is visible at the top right of the table.

Group Name	Category Name	Description	Delete	Block
Admin Assignee	Admin Assignee	Admin Assignee user group.	✗	🔒
Admin Assistant	Admin Asst	Admin Assistant user group.	✗	🔒
Administrator	Administrators	Administrator user group.	✗	🔒
Anonymous Event Requestor	Outside Event Requestor	Anonymous Event Requestor user group.	✗	🔒
Basic Assignee	Basic Assignee	Basic Assignee user group.	✗	🔒
Basic Requestor	Basic Requestor	Basic Requestor user group.	✗	🔒
Dispatcher	Dispatcher	Dispatcher user group.	✗	🔒
Head Custodian	Supervisor Assignee	Head Custodian	✗	🔒
IT Admin	Administrators	IT Admin	✗	🔒
IT Tech	Basic Assignee		✗	🔒
Mechanic	Assignee	Mechanic user group.	✗	🔒
QueCentre SuperUser	Que Centre Super User	Que Centre SuperUser user group.	✗	🔒
Requestor	Requestor	Requestor user group.	✗	🔒
Supervisor Assignee	Supervisor Assignee	Supervisor Assignee user group.	✗	🔒

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Figure 2 System Management - User Groups

Click on Create New User Group

The screenshot shows the 'Add New User Group' form in the Que Centre Management System. The form is titled 'Add New User Group' and has a 'Main Details' tab selected. It contains the following fields and controls:

- User Group Category:** A dropdown menu with the text 'Select Category' and a downward arrow.
- Group Name:** A text input field.
- Default Home Page:** A dropdown menu with the text 'Select Default Home Page' and a downward arrow.
- Description:** A large text area for entering a description.
- Buttons:** Two buttons at the bottom: 'Add' (with a green checkmark icon) and 'Cancel' (with a red X icon).

The page header includes the date 'November 16, 2011', system navigation buttons for 'System', 'Home', and 'Logout', and the 'Que Centre Demo' logo. A navigation menu at the top lists 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. A banner for 'Work Order/Preventive Maintenance Management System' is also visible.

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Figure 3 System Management-Create New User Group

- Select a User Category (usually set up by Que Centre support staff)
- Enter a name for the group
- Set Default Home Page all users in this group will see when they first log into Que Centre
- Add a description if desired.
- Click on Add

Once Group is added, click on the new group in the list to edit.

The screenshot shows the 'Edit User Group' interface for the 'Basic Assignee' group. The page header includes the date 'November 16, 2011', navigation links for 'System', 'Home', and 'Logout', and the 'Que Centre Support' logo. The main title is 'Work Order/Preventive Maintenance Management System'. A navigation bar contains links for 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. The main content area is titled 'Edit User Group: Basic Assignee' and features a tabbed interface with 'Main Details' selected. The form includes fields for 'User Group Category' (Basic Assignee), 'Group Name' (Basic Assignee), and 'Default Home Page' (Work Orders Assigned to Me). A 'Description' text area contains 'Basic Assignee user group.'. Metadata shows the group was created on 10/19/2011 and last modified on 11/10/2011. 'Update' and 'Cancel' buttons are at the bottom.

November 16, 2011 System Home Logout

QUE CENTRE Welcome Que Centre Support
Que Centre Demo

Work Order/Preventive Maintenance Management System

QUE CENTRE

Work Orders Preventive Maintenance Fixed Assets Events Inventory Reports

Edit User Group: Basic Assignee

Main Details Modules Privileges Assign To Groups Assign To Statuses

User Group Category: Basic Assignee

Group Name: Basic Assignee

Default Home Page: Work Orders Assigned to Me

Description: Basic Assignee user group.

Created: Que Centre Support 10/19/2011 2:26:20 PM

Last Modified: Joe Admin 11/10/2011 12:50:46 PM

Update Cancel

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Figure 4 System Management - Edit User Group

Modules

Modules determine which sections, such as Work Orders, Events, System Management, the User Group will have access to.

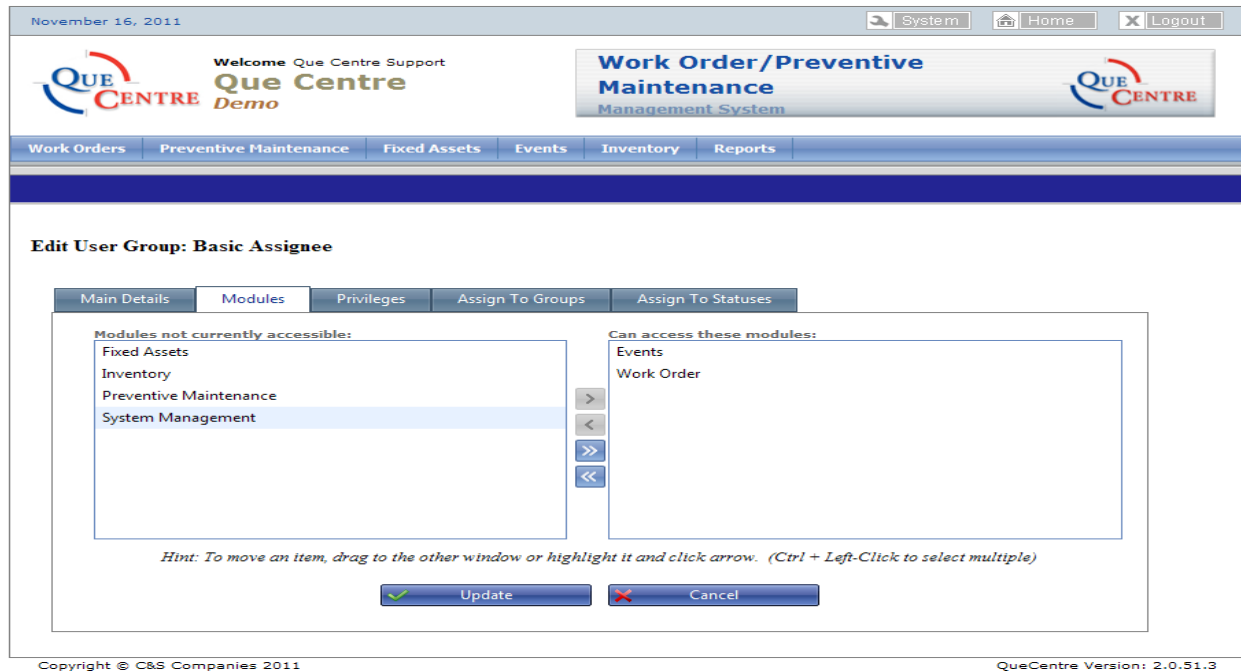


Figure 5 System Management - User Group Modules

Chose Modules this user group should have access to.

Click and drag modules from the left side to the right

Or

Highlight module on the left and click the single right facing arrow to move to the right side.

Clicking the double right facing arrow will move all modules on the left to the right.

If you want to remove access to a module from a user group, click and drag from the right side to the left side

Or

Highlight module on the right and click the single left facing arrow to move to the left side.

Clicking the double left facing arrow will move all modules on the right to the left, thus removing all access to all modules for that user group.

Click on Update to save your changes or click Cancel to discard any changes you have made on this screen

Privileges

Privileges Define what a user group can do within their assigned modules such as Create, Edit, Delete, Assign, Can be Assigned to, etc

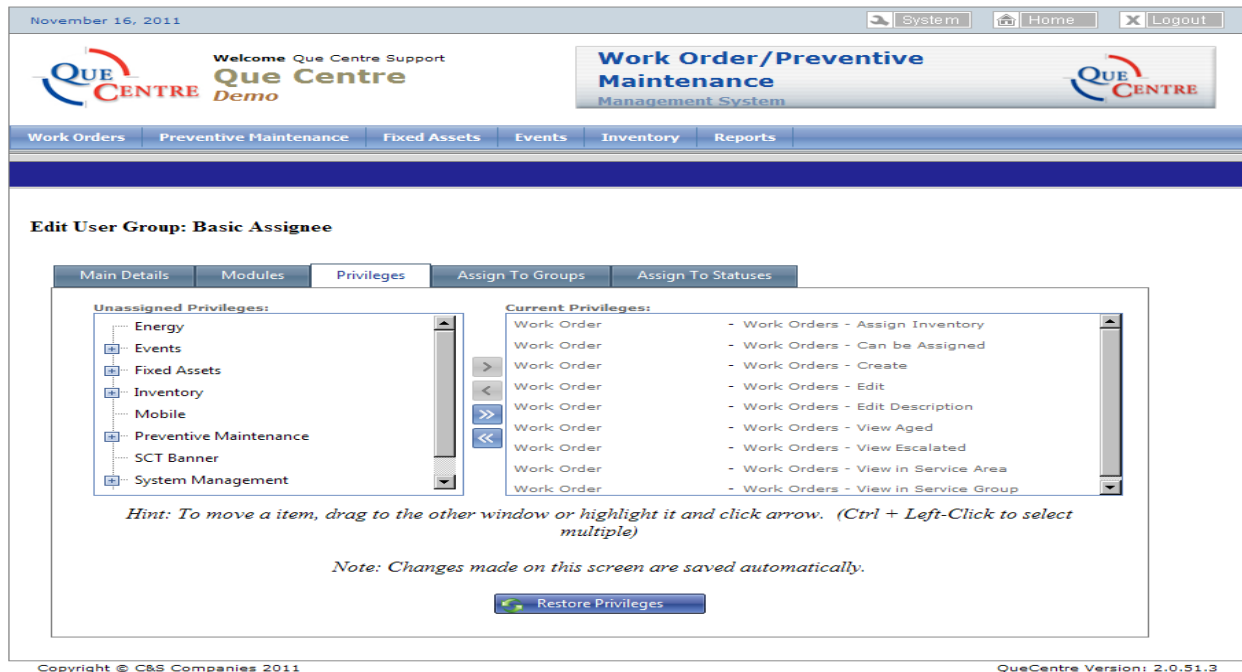


Figure 6 System Management - User Group Privileges

As for the Modules tab, click and drag the desired privileges from the left side to the right side

Or

Highlight and click the single right facing arrow to move the highlighted privilege from the left to the right.

If you wish to remove a privilege, click and drag it from the right side back to the left

Or

Highlight the privilege and click the single left facing arrow to move the highlighted privilege from the right to the left.

Changes made on this screen are saved automatically. If you wish to revert to the previous privileges, click the Restore Privileges button prior to leaving this screen.

The Restore Privileges button will restore the privileges back to the default privileges set at the User Category level.

Assign to Groups

Assign to Groups determines which other User Groups this User Group can assign to. A User Group that can assign to other users will always have the privilege to assign to themselves.

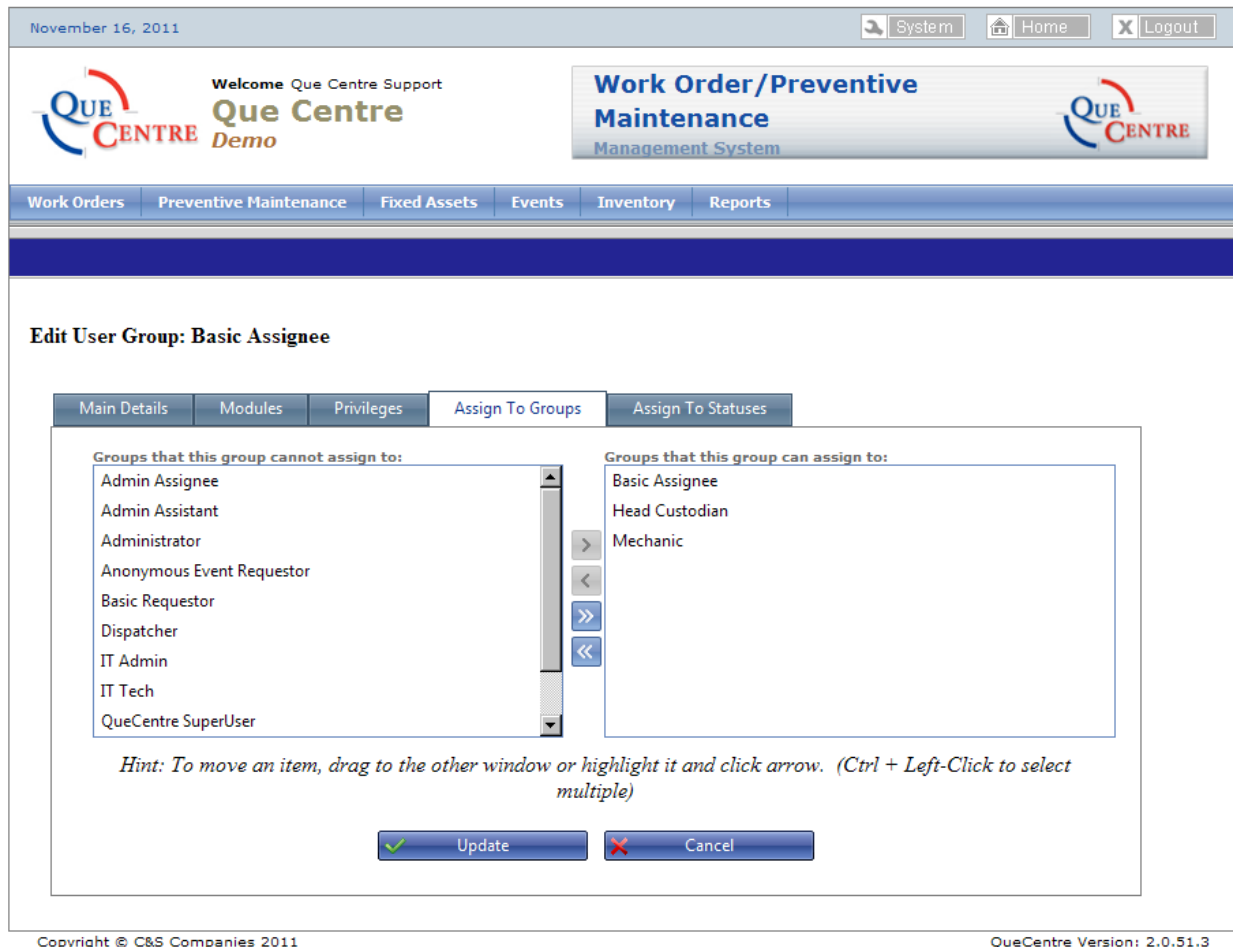


Figure 7 System Management - User Groups Assign to Groups

As for the Modules and Privileges tabs, click and drag the desired groups from the left side to the right side

Or

Highlight and click the single right facing arrow to move the highlighted privilege from the left to the right.

If you wish to remove a privilege, click and drag it from the right side back to the left

Or

Highlight the privilege and click the single left facing arrow to move the highlighted privilege from the right to the left.

Click on Update to save your changes or click Cancel to discard any changes you have made on this screen

Assign To Statuses

Assign to Statuses determines which statuses a User Group will be able to choose throughout the Que Centre System.

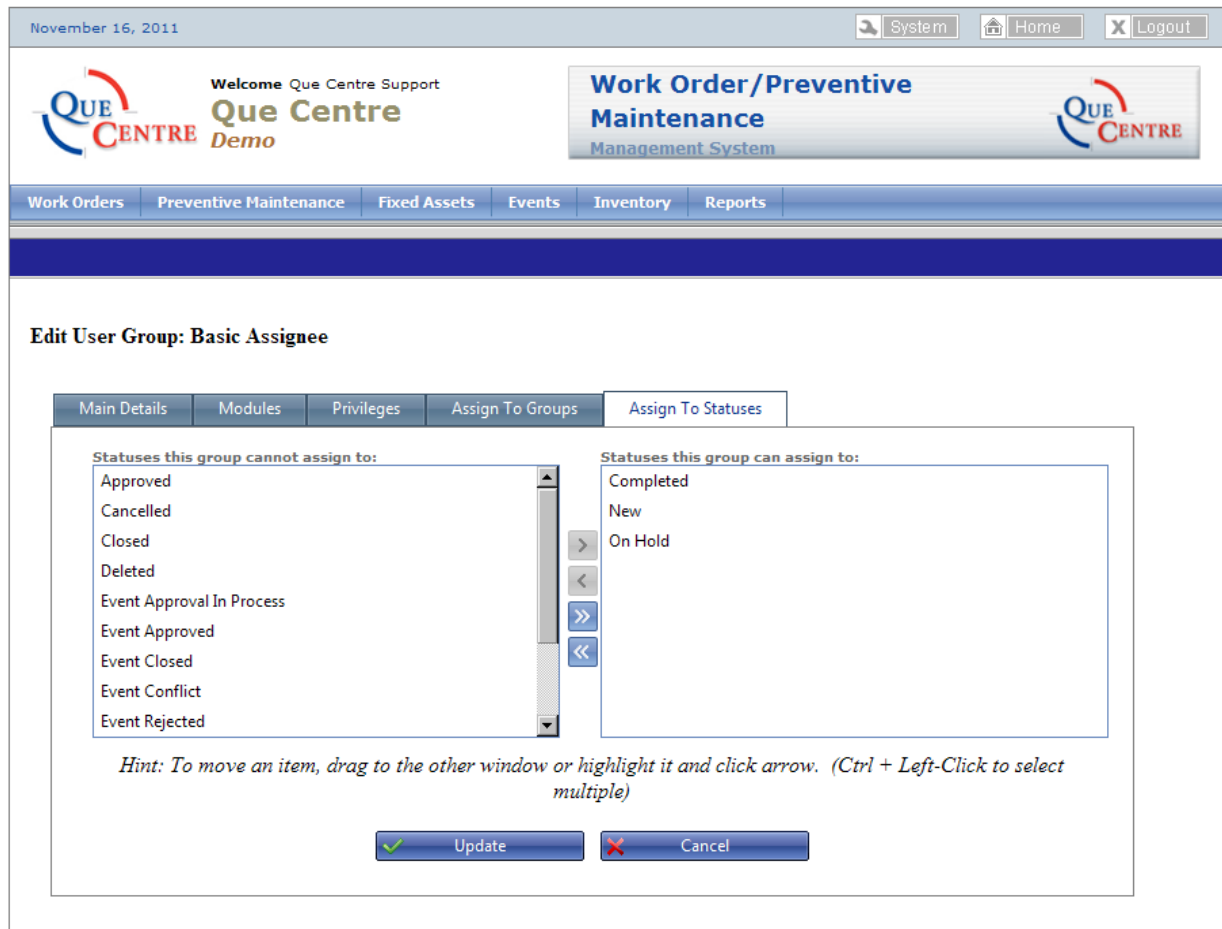


Figure 8 System Management - User Groups Assign to Statuses

As for the Modules, Privileges, and Assign to Groups tabs, click and drag the desired statuses from the left side to the right side

Or

Highlight and click the single right facing arrow to move the highlighted status from the left to the right.

If you wish to remove a status, click and drag it from the right side back to the left

Or

Highlight the status and click the single left facing arrow to move the highlighted status from the right to the left.

Click on Update to save your changes or click Cancel to discard any changes you have made on this screen.

Create a User

- Click on System button
- Hover mouse over User Management
- Click on Users

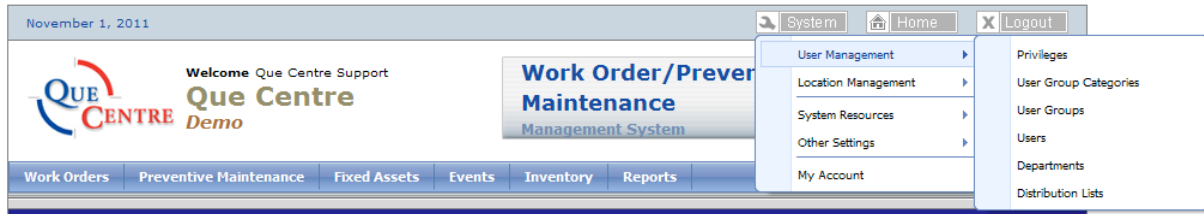


Figure 9 System Management

The list of Users is displayed

The screenshot shows the 'User Management' page in the Que Centre Management System. The date is November 16, 2011. The main header includes the Que Centre logo and the text 'Welcome Joe Admin' and 'Que Centre Demo'. A navigation menu contains 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. The 'User Management' page has tabs for 'User Groups', 'Users', 'Departments', and 'Distribution Lists'. The 'Users' tab is active. Below the tabs are controls for 'User Group' (a dropdown menu), 'Page Size' (set to 25), 'Bulk Update', 'Export Users', and a search box. A '+ New User' button is on the left, and a 'Show Deleted' checkbox is on the right. The main content is a table of users with columns for First Name, Last Name, Email Address, Phone Number, User Group, Delete, and Block.

First Name	Last Name	Email Address	Phone Number	User Group	Delete	Block
Joe	Admin	chris.peters@quecentre.com		Administrator	✗	🔒
Bill	Cleaner	jay.jones@quecentre.com		Basic Assignee	✗	🔒
Joe	Cleaner	cleaner@quecentre.com		Basic Assignee	✗	🔒
Joe	Custodian	tim.thomas@quecentre.com		Head Custodian	✗	🔒
Joe	IT Admin	joe.itadmin@quecentre.com		IT Admin	✗	🔒
Joe	Mechanic	jmechanic@quecentre.com		Basic Assignee	✗	🔒
Sue	Secretary	kim.williams@quecentre.com		Admin Assignee	✗	🔒
Joe	Teacher	teacher@quecentre.com		Basic Requestor	✗	🔒
Joe	Tech	joe.tech@quecentre.com		IT Tech	✗	🔒
Joe	User	tim.thomas@cscos.com		Basic Requestor	✗	🔒

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Figure 10 System Management - Users

Click on New User

Main Details

November 16, 2011

Welcome Joe Admin
Que Centre
Demo

Work Order/Preventive Maintenance
Management System

Work Orders Preventive Maintenance Fixed Assets Events Inventory Reports

Add New User

Main Details Location Associations Favorites

User Group:

Department:

First Name:

Supervisor:

Middle Name:

Employee #:

Last Name:

Phone Number:

Email Address:

Extension:

Title:

Hourly Rate:

Username:

Overtime Rate:

Password:

Agreed to License:

Confirm Password:

License has not been accepted.

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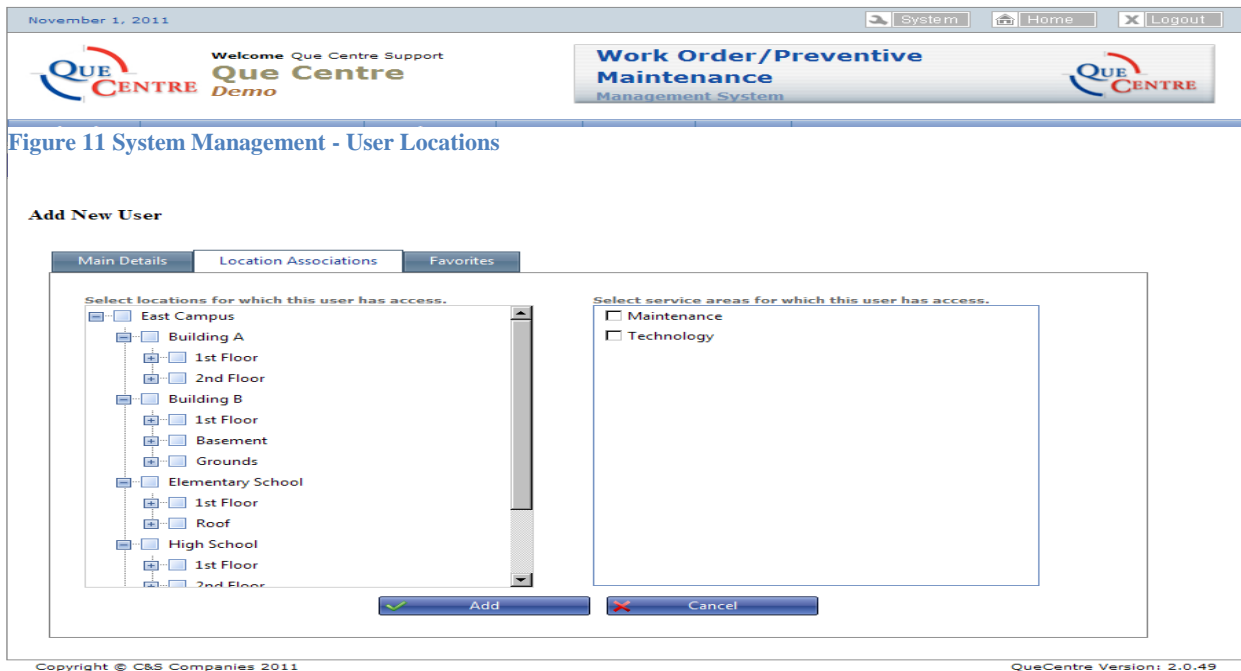
Required Fields

- User Group
- First Name
- Last Name
- Email Address
- Username
- Password

Fill in other fields as needed

Location Associations

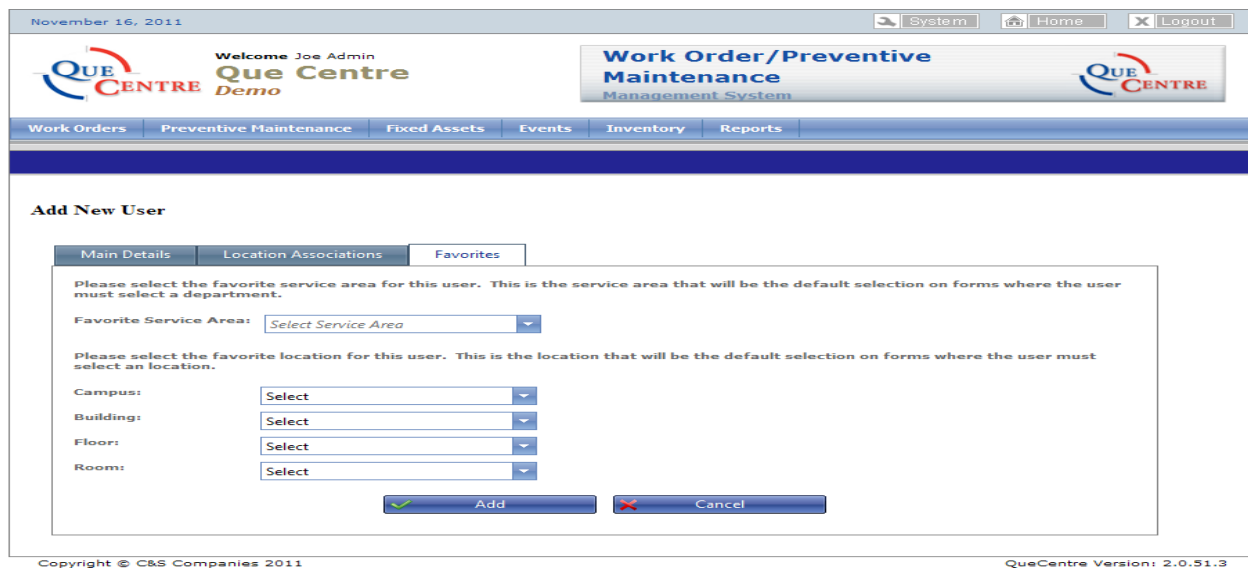
- Select Locations for which this user has access
- Select Service Areas user for which this user has access



Favorites

Select the favorite service area for this user. This is the service area that will be the default selection on forms where the user must select a department.

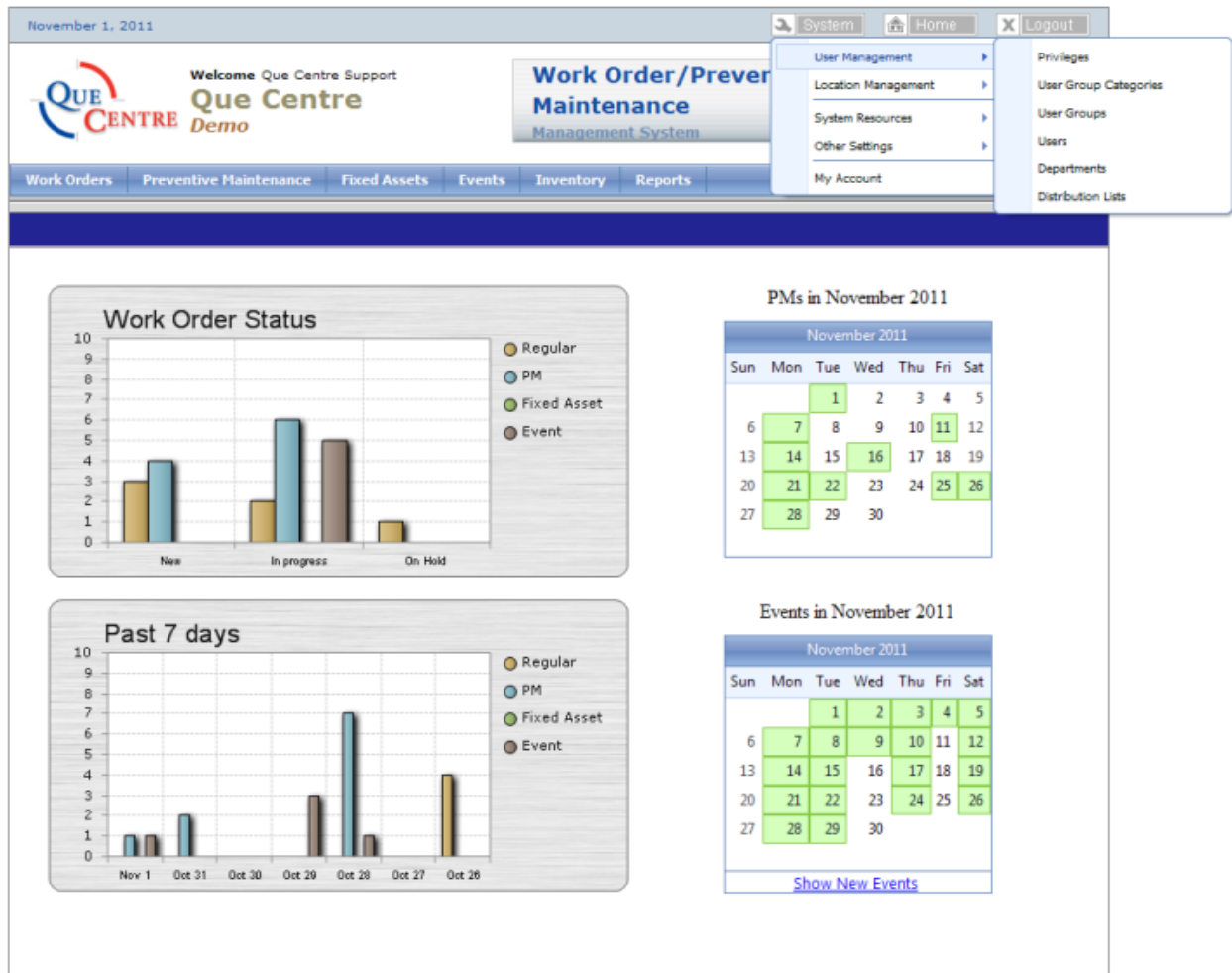
Select the favorite location for this user. This is the location that will be the default selection on forms where the user must select a location.



Departments

Departments are for informational purposes only and should not be confused with Service Areas that are discussed in the Location Management section.

- Click on System button
- Hover mouse over User Management
- Click on Departments



- Name the Department
- Add a description if desired
- Click Add

Distribution Lists

Distribution lists are used to create groups of email addresses that can be cc'd in emails from the communication tab of a work order or event

- Click on System button,
- Hover mouse over User Management
- Click on Distribution list



The screenshot shows the Que Centre Work Order/Preventive Maintenance Management System interface. The top navigation bar includes 'System', 'Home', and 'Logout' buttons. The main header displays the Que Centre logo and the text 'Welcome Que Centre Support Que Centre TESTING SITE ONLY' and 'Work Order/Preventive Maintenance Management System'. Below the header is a navigation menu with tabs for 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. The 'User Management' section is active, showing a sub-menu with tabs for 'Privileges', 'User Group Categories', 'User Groups', 'Users', 'Departments', and 'Distribution Lists'. The 'Distribution Lists' tab is selected, displaying a table with columns for 'List Name', 'Description', 'Delete', and 'Block'. A 'Create New List' button and a 'Show Deleted' checkbox are also visible.

List Name	Description	Delete	Block
Administrators		X	🔒
Grounds	Grounds	X	🔒
Mechanics		X	🔒
Mechanics		X	🔒
Principals		X	🔒
test		X	🔒
Test 1	Test 1	X	🔒

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Figure 13 System Management - Distribution Lists

Click on New List

The screenshot displays the 'Add New Distribution List' form within the Que Centre Work Order/Preventive Maintenance Management System. The interface includes a top navigation bar with 'System', 'Home', and 'Logout' buttons. The main header features the Que Centre logo and the text 'Welcome Que Centre Support Que Centre TESTING SITE ONLY' and 'Work Order/Preventive Maintenance Management System'. Below the header is a menu bar with 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. The main content area is titled 'Add New Distribution List' and contains a form with the following fields and controls:

- List Name:** A text input field.
- Blocked:** A checkbox.
- Description:** A large text area.
- Buttons:** 'Add' (with a green checkmark icon) and 'Cancel' (with a red X icon).

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Figure 14 Create New Distribution List

- Name the list, add a description if desired
- Click Add to save
- Edit List to add User Groups to the list

Location Management

Locations

- Click on System button
- Hover mouse over Location Management
- Click on Locations

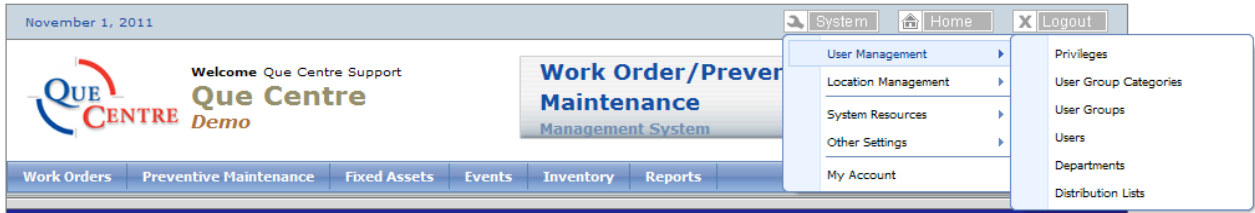


Figure 15 Location Management



Figure 16 Location management Add Location

Create a new Location

To create a new location, right click on the level above where you want to create the location. If you don't see all levels, click the "+" sign to expand the child levels. If you want to add a building, right click on the site level. If you want to add a floor, right click on the building level and if you want to create a room, right click on the floor level. Then select add location.

Fill out information as needed

Figure 17 Location Management - Add Location

Service Areas

Service areas are used to define areas of service. These can include Maintenance, Custodial, Technology, etc. Service areas allow you to define various settings throughout the system. For example, custom fields are associated with process statuses for individual Service Areas. A Maintenance Work Order may have different custom fields than a Technology Work Order.

Service Area Name	Description	Delete	Block
Grounds		X	🔒
Maintenance	Maintenance	X	🔒
Technology	Technology	X	🔒

Figure 18 Management - Service Areas

Create a new Service Area

- Click on Create a new Service Area
- Name the Service Area
- Fill in a description if desired
- If it is the primary service area, check the box.
- Click Add

The screenshot displays the 'Add New Service Area' form within the Que Centre Management System. The interface includes a header with the date 'November 17, 2011', user information 'Welcome Joe Admin', and the system title 'Work Order/Preventive Maintenance Management System'. A navigation bar contains links for 'Work Orders', 'Preventive Maintenance', 'Fixed Assets', 'Events', 'Inventory', and 'Reports'. The form itself has three tabs: 'Main Details', 'Service Area Users', and 'Supervisors'. Under the 'Main Details' tab, there are fields for 'Service Area Name', 'Description', 'Primary Service Area' (with a checkbox), and 'Blocked' (with a checkbox). At the bottom of the form are 'Add' and 'Cancel' buttons. The footer contains the text 'Copyright © C&S Companies 2011' and 'QueCentre Version: 2.0.52.2'.

Figure 19 Location Management - Add new Service Area

System Resources

Public Documents

Public documents are files that are uploaded that are available to use in various areas of the system. They may be image files, documents or spreadsheets that are attached to procedures or equipment.

The screenshot shows the Que Centre Management System interface. At the top, there is a navigation bar with links for System, Home, and Logout. Below this is a header area with the Que Centre logo and the text "Welcome Joe Admin" and "Que Centre TESTING SITE ONLY". To the right of the header is a box for "Work Order/Preventive Maintenance Management System". Below the header is a menu bar with links for Work Orders, Preventive Maintenance, Fixed Assets, Events, Inventory, and Reports. The main content area is titled "System Resources" and has two tabs: "Public Documents" (selected) and "User Documents". Below the tabs is a "Create New Public Document" button and a "Show Deleted" checkbox. The main content is a table with the following data:

Document Name	File Name	Description	Delete	Block
- Image	red_20shovel-38x38_22.jpg	- Image	X	🔒
- Image	red_20shovel-38x38_23.jpg	- Image	X	🔒
AHU	AHU_4.pdf		X	🔒
Air Filter list	Air_Filter_List_10.xls	Air Filter list	X	🔒
Battery Chargers	battery_9.jpg	Battery Chargers Image	X	🔒
Compressor Check List	compressor_check_list_21.pdf		X	🔒
Customer Logo	QueCentreLogo.jpg	Customer Logo	X	🔒
Faucet Diagram	Faucet_parts_3.pdf	Faucet Diagram	X	🔒
MSDS	msds_5.pdf		X	🔒
Roof Layout	roof_layout_6.pdf		X	🔒
Roof Warranty	roof_warrenty_7.pdf		X	🔒
Scale Image	scale_8.jpg	Scale Image	X	🔒
Trane Air Handler	TraneAirHandler_19_2.gif	Trane Air Handler image	X	🔒

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Figure 20 System Resources - Public Documents

User Documents

User documents are documents that the logged in user has uploaded to the system. Clicking on a document in the list will open the document in the corresponding program. The file can be viewed and edited, although changes to the document will not be saved to the original file that is available in Que Centre. If changes need to be made to a user document, the document should be uploaded again after the edits have been made.

Main Program

The section of Que Centre where Work Orders, Preventive Maintenance, Fixed Assets, Inventory Reports, and Events Modules are managed.

Dashboard

The dashboard provides a quick snapshot of Work Orders as well as a quick view calendar for both Preventive Maintenance and Event items.

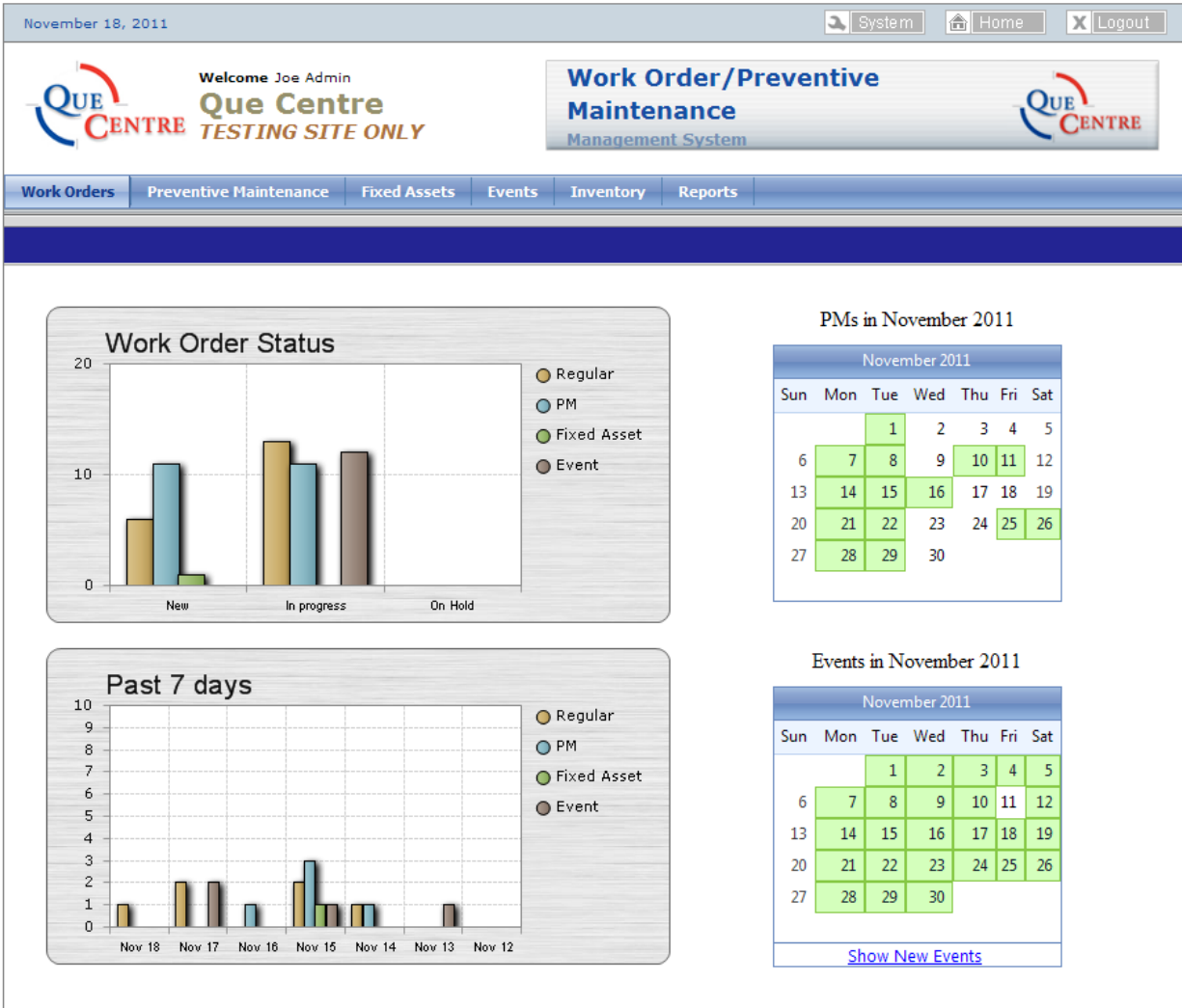


Figure 21 Dashboard

Work orders are displayed in two bar charts

The top chart, labeled Work Order Status, shows the number of Work Orders in various stages. It displays New, In Progress, and On Hold for Regular, PM, Fixed Asset and Event Work Orders. This chart is refreshed with current data each time you go to the page

Dashboard (cont)

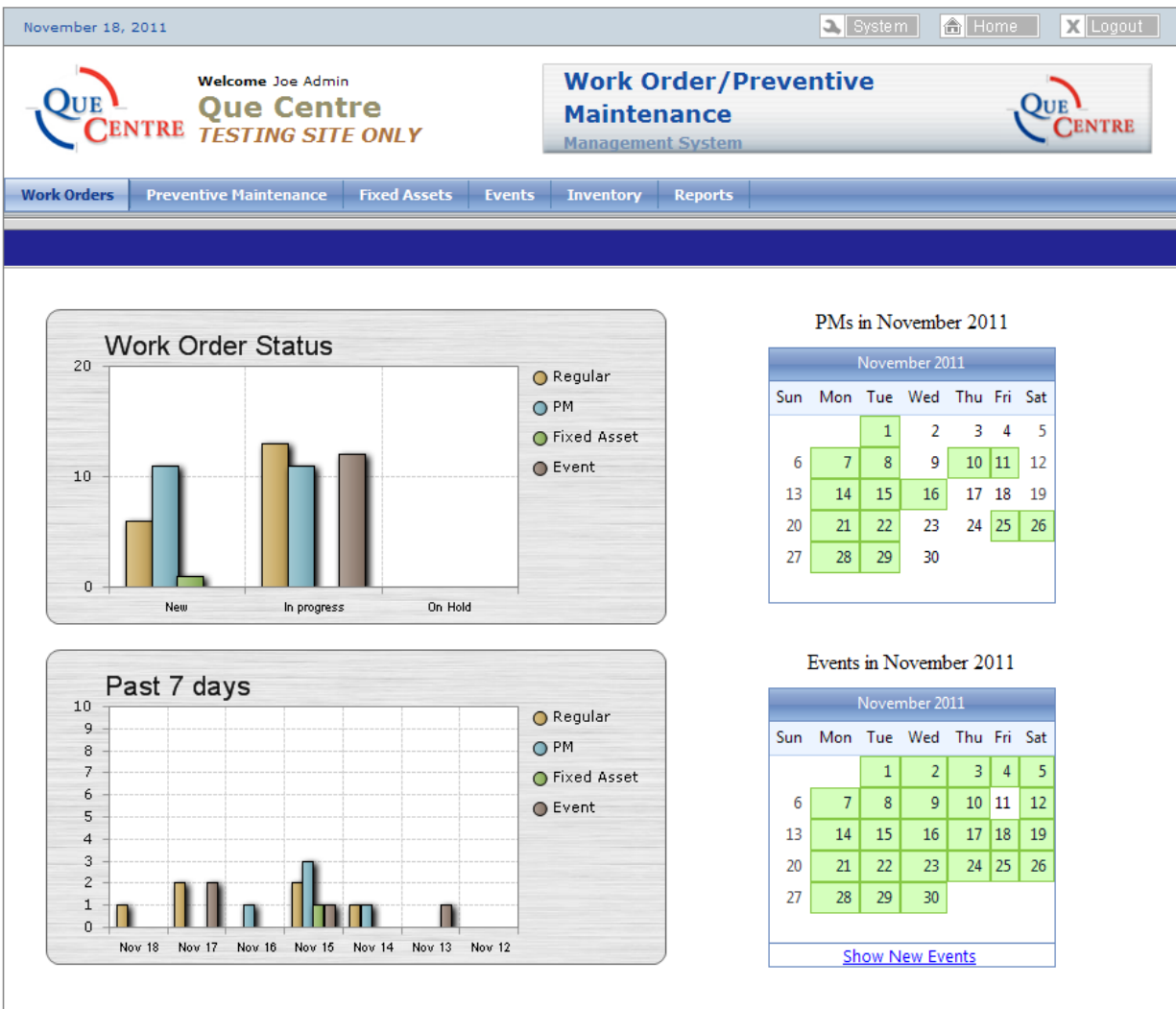


Figure 22 Dashboard

The second chart, labeled Past 7 Days, shows the number of work orders generated within the past 7 days. This allows you to see how Work Orders are progressing over the past 7 days.

The Dashboard also displays two calendars; one for Preventive Maintenance Schedules and one for Events. In addition to giving a quick overview of Preventive Maintenance and Events schedules, the calendars are clickable. Clicking on a calendar on the Dashboard will take you to the full calendar for either Preventive Maintenance or Events.

Across the top of the Dashboard are clickable tabs for the various modules in Que Centre. Which tabs are visible depends on which privileges and modules the logged in user has access to.

Work Orders

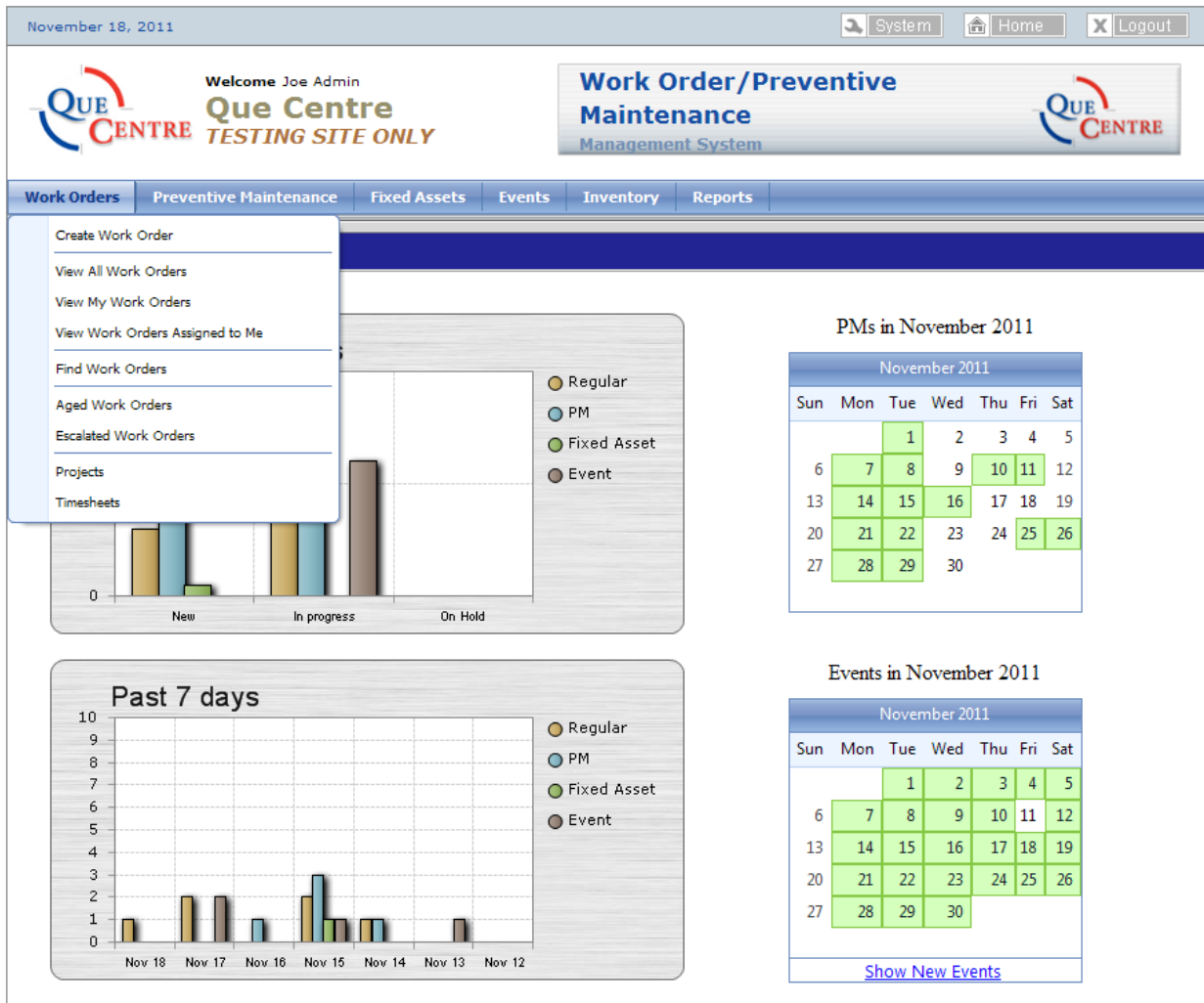


Figure 23 Dashboard - Work Orders

Clicking on the Work Orders tab at the top of the Dashboard will open a drop down box with Work Order related choices. The choices available will depend on which privileges the logged in user has been assigned.

Create Work Order

Click on the Work Orders tab at the top of the Dashboard, then click on Create Work Order. The Create New Work Order is opened.

Update Update And Print Print Return To List

Create New Work Order

Work Order Contact

Contact Information: Admin, Joe

In case of **EMERGENCY**, who ya gonna call? [Ghostbusters!](#)

Work Order Details Inventory

Details

Service Area: - Maintenance

Campus: East Campus

Building: Select

Floor: Select

Room: Select

Location:

Fixed Asset Equipment

Fixed Asset:

Refresh Fixed Asset List

Description:

Words: 0 Characters: 0

Status: New

Additional Information

Date Needed by:

Date Damage Occured:

Vandalism:

email joe:

Update Update And Print Print Return To List

Figure 24 Create New Work Order

Contact Information

The Contact Information is automatically filled out with the logged in user's name. In some cases you may be creating a Work Order for someone else. In that case, the drop down box contains the names of all users in the system. This is useful if Work Orders are entered into Que Centre by one staff member.

Details

The central section of the Create Work Order page contains basic details about the Work Order. Service Area, Location and Description are filled out here. If a user has selected a Favorite

Service Area or a Favorite Location, those fields will be automatically filled in. If they are filled in, they can be changed as needed.

Details (cont)

To see a list of Fixed Assets click the appropriate radio button and then click Refresh Fixed Asset List. A list of Fixed Assets will appear in the drop down box. The same is true for Equipment. Select the Equipment radio button, click Refresh Equipment List and a list of Equipment will appear in the drop down box

Status

The default status for a Work Order is New. The Status drop down box contains a list of statuses the logged in user has permission to use. Change the status here as appropriate.

Additional Information

The bottom section of the Create Work Order page is customizable to your particular needs. Que Centre Support Staff will help you determine what information you need to capture and will set up custom fields and apply them to various stages of Work Orders. When additional information is filled out in this area, it will be carried forward the life cycle of a Work Order.

Save Work Order

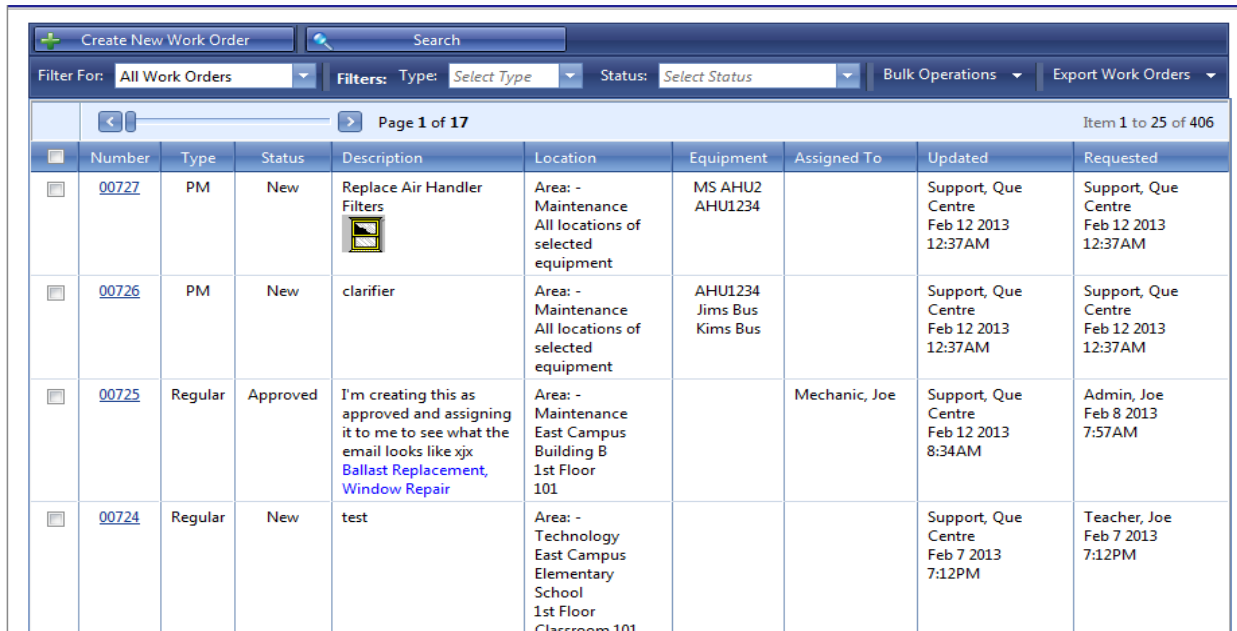
Once the Work Order is filled out, click the Update button at the top of the screen to submit the Work Order.

If you wish to return to the Work Order List without submitting the Work Order, click on the Return to List button.

If you would like to submit and print the Work Order, click on the Update and Print Button

View All Work Orders

Click on the Work Orders tab at the top of the Dashboard, then click on View All Work Orders. The list of all Work Orders is opened.



The screenshot shows a web application interface for viewing work orders. At the top, there is a navigation bar with a 'Create New Work Order' button, a search field, and filter options for 'Filter For: All Work Orders', 'Filters: Type: Select Type', and 'Status: Select Status'. There are also 'Bulk Operations' and 'Export Work Orders' tabs. Below the navigation bar, a table displays a list of work orders. The table has columns for Number, Type, Status, Description, Location, Equipment, Assigned To, Updated, and Requested. The first four rows of the table are visible, showing work orders with numbers 00727, 00726, 00725, and 00724. The interface also shows 'Page 1 of 17' and 'Item 1 to 25 of 406'.

Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
00727	PM	New	Replace Air Handler Filters	Area: - Maintenance All locations of selected equipment	MS AHU2 AHU1234		Support, Que Centre Feb 12 2013 12:37AM	Support, Que Centre Feb 12 2013 12:37AM
00726	PM	New	clarifier	Area: - Maintenance All locations of selected equipment	AHU1234 Jims Bus Kims Bus		Support, Que Centre Feb 12 2013 12:37AM	Support, Que Centre Feb 12 2013 12:37AM
00725	Regular	Approved	I'm creating this as approved and assigning it to me to see what the email looks like xjx Ballast Replacement, Window Repair	Area: - Maintenance East Campus Building B 1st Floor 101		Mechanic, Joe	Support, Que Centre Feb 12 2013 8:34AM	Admin, Joe Feb 8 2013 7:57AM
00724	Regular	New	test	Area: - Technology East Campus Elementary School 1st Floor Classroom 101			Support, Que Centre Feb 7 2013 7:12PM	Teacher, Joe Feb 7 2013 7:12PM

Figure 25 Work Orders - View All Work Orders

Filter

Filters are available on all the View Work Order screens

Work Orders can be filtered by Type or Status. There is also a find option that allows you to search on different fields, as well as a Bulk Operation tab and an Export Work Order tab.

Bulk Operations

Bulk Operations are available on all the View Work Order screens

Bulk Update

Status and Assigned To fields can be updated for multiple Work Orders at one time. All Work Orders must be in the same Service Area to use the Bulk Update function. Click the checkbox next to the Work Orders that you want to update and then click Bulk Update under the Bulk Operation tab.

Bulk Print

Multiple Work Orders may be selected and printed. Click the checkbox next to the Work Orders that you want to print and then click Bulk Print under the Bulk Operation tab.

Export Work Orders

Work Orders can also be exported to Word or Excel. Click the checkbox next to the Work Orders that you want to export and then click either Export to Excel or Export to Word under the Export Work Orders tab.

My Work Orders

The My Work Orders tab allows you to see Work Orders the logged in user has created. Filter and Bulk Operations function as described in the View All Work Orders section on page 20.



Create New Work Order		Search							
Filter For: My Work Orders		Filters: Type: Select Type		Status: Select Status		Bulk Operations		Export Work Orders	
	Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
<input type="checkbox"/>	00343	Regular	Completed	testing inventory Low	Area: - Maintenance East Campus Elementary School 1st Floor Classroom 101			Support, Que Centre Jun 12 2012 2:52PM	Mechanic, Joe Mar 23 2012 3:51PM
<input type="checkbox"/>	00212	Regular	Approved	Snow Removal Carpet Extraction	Area: - Maintenance East Campus Elementary School 1st Floor Classroom 101		Cleaner, Joe	Admin, Joe Jan 23 2012 10:06AM	Mechanic, Joe Jan 20 2012 2:12PM
<input type="checkbox"/>	00198	Regular	Completed	ertewrt...added to the description 	Area: - Maintenance East Campus Elementary School 1st Floor Classroom 101		Mechanic, Joe	Support, Que Centre Jun 12 2012 3:04PM	Mechanic, Joe Jan 17 2012 2:55PM
<input type="checkbox"/>	00173	Regular	Approved	test 	Area: - Maintenance East Campus Elementary School 1st Floor Computer Lab			Support, Que Centre Jan 12 2012 10:59AM	Mechanic, Joe Jan 11 2012 6:04PM

Figure 26 My Work Orders

Assigned to Me

The Assigned to Me tab displays a list of Work Orders currently assigned to the logged in user. Filter and Bulk Operations function as described in the View All Work Orders section on page 20.


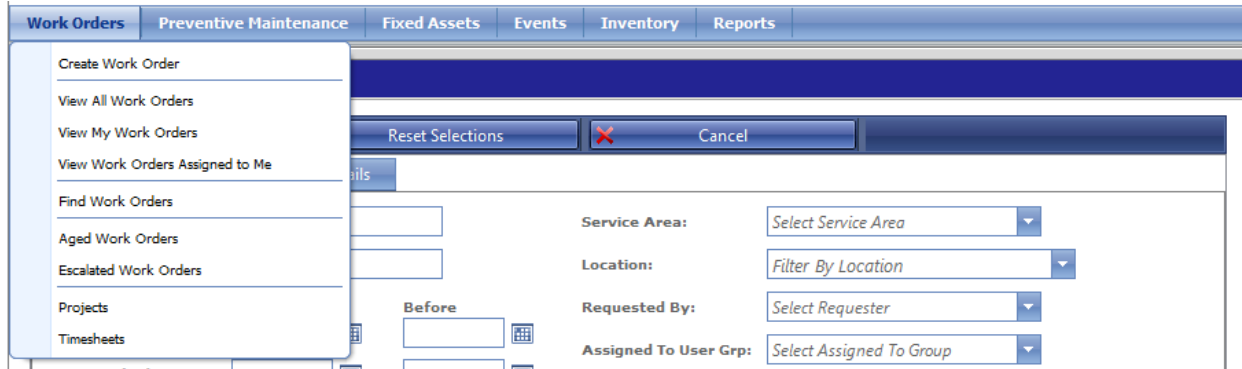
Create New Work Order		Search							
Filter For: Assigned To Me		Filters: Type: Select Type		Status: Select Status		Bulk Operations		Export Work Orders	
Page 1 of 3									
	Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
<input type="checkbox"/>	00725	Regular	Approved	I'm creating this as approved and assigning it to me to see what the email looks like xgx Ballast Replacement, Window Repair	Area: - Maintenance East Campus Building B 1st Floor 101		Mechanic, Joe	Support, Que Centre Feb 12 2013 8:34AM	Admin, Joe Feb 8 2013 7:57AM
<input type="checkbox"/>	00720	Regular	Approved	test 100, Ballast Replacement, Window Repair, Large Text 	Area: - Maintenance East Campus Elementary School 1st Floor Auditorium		Mechanic, Joe	Support, Que Centre Feb 8 2013 12:29PM	User, Joe Feb 6 2013 1:21PM
<input type="checkbox"/>	00714	PM	Approved	ES AHU Check test	Area: - Maintenance All locations of selected equipment	ES AHU1 AHU1234 ES AHU4 AHU15 More	Mechanic, Joe	Support, Que Centre Feb 6 2013 7:42AM	Support, Que Centre Feb 1 2013 12:37AM
<input type="checkbox"/>	00708	PM	Approved	Monthly Roof Check	Area: - Maintenance East Campus High School 1st Floor Auditorium	AHU1234	Mechanic, Joe	Support, Que Centre Jan 26 2013 12:42AM	Support, Que Centre Jan 26 2013 12:42AM

Figure 27 Assigned to Me

Aged and Escalated Work Orders

The links for aged and escalated work orders are now located on the work orders drop down



Aged Work Orders

The Aged Work Orders tab displays a list of Aged Work Orders. The Aging period is defined by Que Centre Support Staff in the system settings. A Work Order will appear in this list if it remains in the system, not closed, for longer than the defined number of days

Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
00720	Regular	Approved	test 100, Ballast Replacement, Window Repair, Large Text	Area: - Maintenance East Campus Elementary School 1st Floor Auditorium		Mechanic, Joe	Support, Que Centre Feb 8 2013 12:29PM	User, Joe Feb 6 2013 1:21PM

Figure 28 Aged Work Orders

Escalated Work Orders

The Escalated Work Orders tab displays a list of Escalated Work Orders. The Escalated period is defined by Que Centre Support Staff in system settings. A Work Order is Escalated if it remains in one status and was created more than the defined number of days.

Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
00665	Regular	Approved	Testing ccd emails	Area: - Maintenance East Campus Elementary School 1st Floor Auditorium			Support, Que Centre Jan 10 2013 4:00PM	Support, Que Centre Jan 10 2013 4:00PM

Figure 29 Escalated Work Orders

Find Work Orders

Find Work Orders allows you to search for Work Orders that match criteria you select. Once you make the selections and click on Apply Filters, a new window is opened with a list of Work Orders that meet the specifications you indicated. From there the Bulk Operations and Export options can be used if desired.

Figure 30 Find Work Order

Projects

Projects are related Work Orders that are grouped together.

Project Name	Description	Project Status	Delete
Summer Floor Maintenance	Summer Floor Maintenance	In Progress	

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Create New Project

Click on the Create New Project Button. The Add New Project window opens. Name the Project and add a description if desired. Click on Add.

Add New Project

Project Name:

Description:

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Figure 31 Add New Project

Edit Project

All Work Orders for the Project must be entered prior to creating the Project.

Add the appropriate Work Orders to the project by clicking and dragging the Work Order from the left side of the screen to the right or by highlighting the Work Order and pressing the single right facing arrow. Clicking the double right facing arrow will move all Work Orders to the project. Work Orders can be reversing the process. Click update at the bottom of the screen

Edit Project: Summer Work

Project Name:

Description:

Work Orders:

- 00058 Ants on the floor
- 00057 the hot coals have burned a hole in t...
- 00056 ants
- 00052 cracked window
- 00045 Please spray for ants
- 00034 need to get the white board removed
- 00031 need boxes moved
- 00030 whiteboard needs to be fixed

Work Orders assigned to this Project:

Hint: To move an item, drag to the other window or highlight it and click arrow. (Ctrl + Left-Click to select multiple)

Notes
Add Note:

Figure 32 Edit Project

Preventive Maintenance (PM)



Figure 33 Preventive Maintenance

Clicking on the Preventive Maintenance tab at the top of the Dashboard will open a drop down box with PM related choices. The choices available will depend on which privileges the logged in user has been assigned.

Create Preventive Maintenance Schedule

Click on the Preventive Maintenance tab at the top of the Dashboard and then click on Create Preventive Maintenance Schedule. The Create Preventive Maintenance Schedule is opened.

Preventive Maintenance Schedule

PM Details | Schedule Details

PM Schedule Name:

Description:

Contact Information: Admin, Joe

Service Area: Select Service Area

Status: New

Procedures: Select

Equipment:

- Cleaning Equipment
- ES Air Handlers
- Fans
- Floor Scales
- Floor waxer parts
- Hardware
- HS Air Handlers
- MS Air Handlers

Equipment Included in this PM:

Add Equipment Add Equipment Category Add Procedure

Additional Details

No additional information required.

Update Cancel

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Figure 34 Preventive Maintenance - Create New Schedule

PM Schedule Name

Name the PM Schedule

Description

Add a description if desired

Contact Information

The Contact Information is automatically filled out with the logged in user's name. In some cases you may be creating a PM Schedule for someone else. In that case, the drop down box contains the names of all users in the system. This is useful if PMs are entered into Que Centre by one staff member.

Service Area

If a user has selected a Favorite Service Area this will automatically be filled in. If it is filled in, it can be changed as needed.

Status

Select a status for the PM Schedule

Procedures

Procedures that have already been created will be in this drop down box. Check the procedure(s) you want. More than one procedure may be attached to a PM Schedule. If the procedure has not been created, you can add a new procedure by clicking the Add New Procedure button at the bottom of the screen. The steps for creating a procedure are outlined in the [Create Procedure](#) section on page 45

Equipment

A PM is created against a piece of Equipment. Equipment that has already been created will be in the left had side of the Equipment window. If the piece of equipment has not been created, you can add new equipment by clicking the Add New Equipment button at the bottom of the page. If needed, an Equipment Category can also be added. The steps for creating equipment and equipment categories are outlined in the [Create New Equipment](#) section on page 43 and the [Create New Equipment Category](#) section on page 41

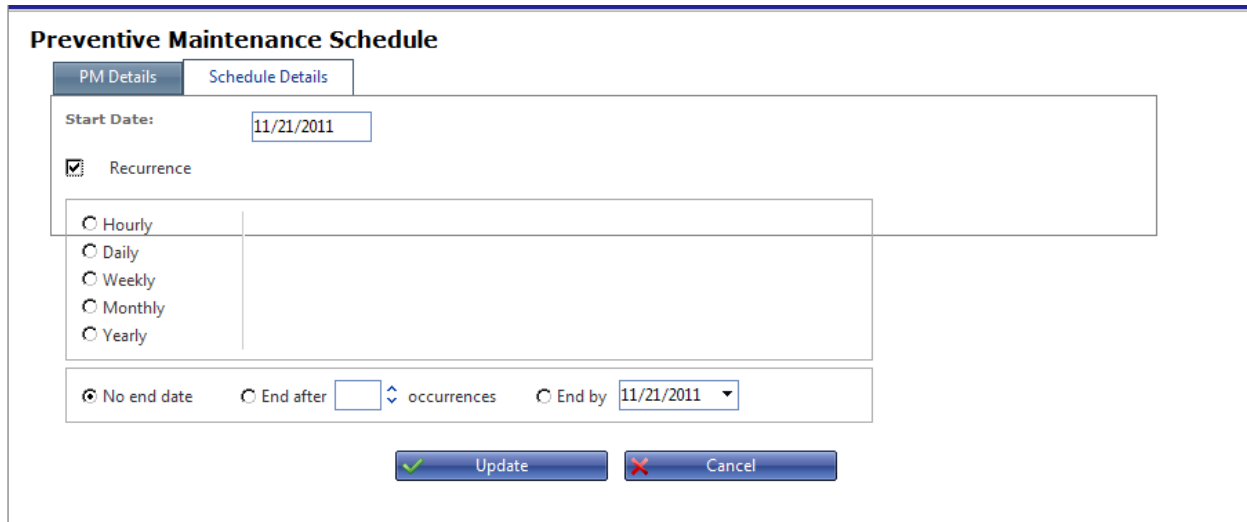
Select a piece of equipment by clicking and dragging it to the right side or highlighting the piece of equipment and clicking the single right facing arrow. Clicking the double right facing arrow will add all pieces of equipment to the PM and clicking the double left facing arrow will remove all pieces of equipment from the PM.

Additional Information

Additional Information can be added to the PM Schedule form by using custom fields. Once the PM Schedule is saved, additional information, if included, will appear in the Additional Information area. Fill out as needed.

Schedule Details

Click on the Schedule details tab to open the Preventive Maintenance Schedule Window. Check the “Recurrence” box to show the recurrence options. Select the options as appropriate, including an end date. PM’s can be scheduled ongoing with no end date, to end after X occurrences or to end on a specific date.



The image shows a dialog box titled "Preventive Maintenance Schedule". It has two tabs: "PM Details" and "Schedule Details", with "Schedule Details" selected. The "Start Date" is set to "11/21/2011". The "Recurrence" checkbox is checked. Below it, there are radio buttons for "Hourly", "Daily", "Weekly", "Monthly", and "Yearly". At the bottom, there are three options: "No end date" (selected), "End after" (with a spinner box), and "End by" (set to "11/21/2011"). There are "Update" and "Cancel" buttons at the bottom.

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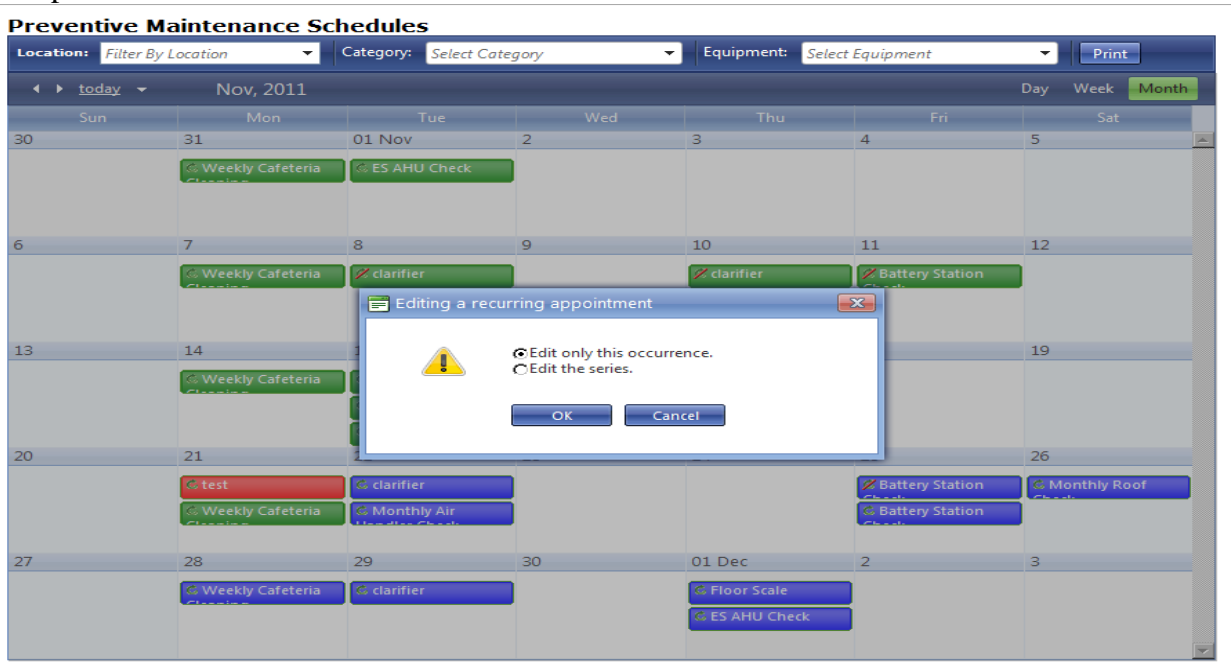
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Figure 35 Preventive Maintenance - Recurrence

Click Update and the PM will be added to the Preventive Maintenance calendar.

Edit Preventive Maintenance Schedule

Once created, a Pm can be edited. Double clicking on a PM displayed on the calendar gives you the option to edit the series or edit that instance.



The image shows a calendar view titled "Preventive Maintenance Schedules". The calendar is for November 2011. It shows various maintenance tasks as colored blocks. A dialog box titled "Editing a recurring appointment" is open over the calendar. The dialog has a yellow warning icon and two radio buttons: "Edit only this occurrence." (selected) and "Edit the series." There are "OK" and "Cancel" buttons at the bottom of the dialog.

Edit Preventive Maintenance Schedule (Cont)

Choosing to edit the series will edit all instances for that PM Schedule. Choosing to edit this instance only will only edit the schedule for that day.

Instances

Instances (reoccurrences) for the PM are shown on the Instances tab. Instances can be deleted or edited from this screen.

Preventive Maintenance Schedule

PM Details | Schedule Details | **Instances**

Name	Description	Scheduled Date	Delete
Renew XYZ Software License	Renew XYZ Software License	11/16/2011	
Renew XYZ Software License	Renew XYZ Software License	11/21/2012	X
Renew XYZ Software License	Renew XYZ Software License	11/20/2013	X

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Figure 36 Preventive Maintenance - Instances

View PM Calendar

Clicking the View PM Calendar under the Preventive Maintenance tab will open the PM calendar

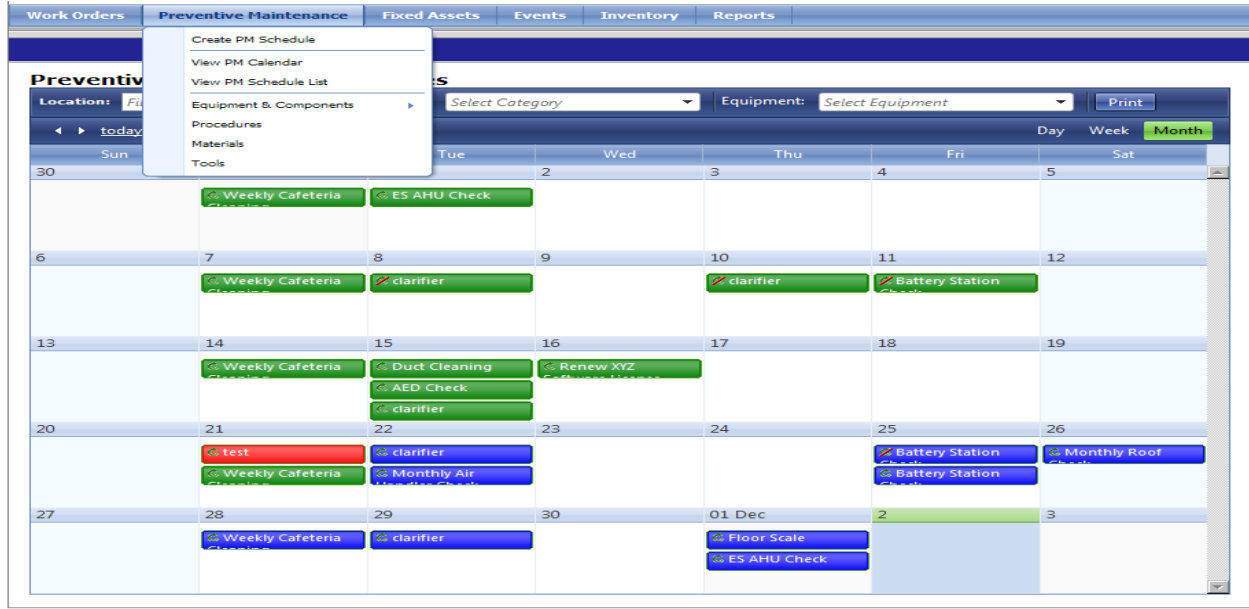
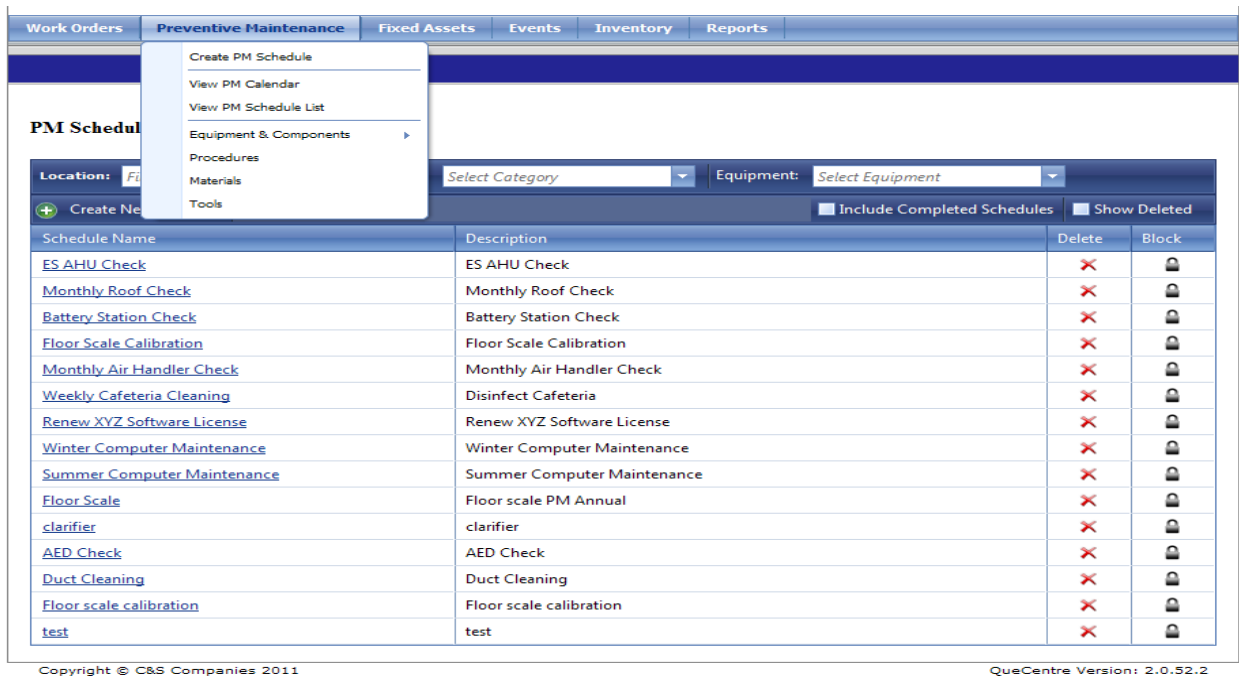


Figure 37 Preventive Maintenance - View PM Calendar

View PM Schedule List

Clicking the View PM Schedule List under the Preventive Maintenance tab will open a list of PM Schedules. Schedules can be deleted or edited from this screen.



Equipment and Components

Before a piece of equipment or a component can be added to Que Centre, the appropriate Equipment Category must be set up first.

Equipment Categories

Existing Equipment Categories can be edited or deleted from this screen

Equipment Categories

+ Create New Equipment Category Show Deleted					
	Name	Description	Type	Delete	Block
▶	Cleaning Equipment	Cleaning Equipment	Equipment	✗	🔒
▶	Compressors		Equipment	✗	🔒
▶	ES Air Handlers	ES Air Handlers	Equipment	✗	🔒
▶	Floor Scales	Floor Scales	Equipment	✗	🔒
▶	Generators		Equipment	✗	🔒
	HS Air Handlers	HS Air Handlers	Equipment	✗	🔒
▶	MS Air Handlers	MS Air Handlers	Equipment	✗	🔒
▶	Water Treatment		Equipment	✗	🔒

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Figure 38 Preventive Maintenance - Equipment Categories

Create New Equipment Category

- Click on Create New Equipment Category
- Chose either Equipment or Component as the type
- Name the Category and add a description if desired
- Assign the Service Area
- Click Add to save

Add New Equipment Category

Equipment Type: Description:

Category Name:

Service Area:

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Figure 39 Preventive Maintenance - Add Equipment Category

Equipment and Components

Click on Equipment and Components under the Preventive Maintenance tab. Then click on Equipment to open the Equipment List.

Work Orders | **Preventive Maintenance** | Fixed Assets | Events | Inventory | Reports

Equipment & Components

- Create PM Schedule
- View PM Calendar
- View PM Schedule List
- Equipment & Components
 - Equipment
 - Components
 - Equipment Categories
- Procedures
- Materials
- Tools

Equipment Search:

Show Deleted Show Blocked

Equipment Name	Manufacturer	Description	Delete	Block
▶ AHU1234			✗	🔒
▶ ES AHU1	Trane	ES AHU1	✗	🔒
▶ Floor Scales		Floor Scales	✗	🔒
▶ Floor Scrubber	Dyson	Riding Floor Scrubber	✗	🔒
▶ Floor Waxer		Floor Waxer	✗	🔒
▶ MS AHU2			✗	🔒
▶ MS Air Handler2			✗	🔒

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Figure 40 Preventive Maintenance – Equipment

Add New Equipment

The screenshot shows a web-based form titled "Add New Equipment". At the top, there are two tabs: "Main Details" (which is active) and "Component Associations". The form is divided into two columns of fields. The left column includes: "Equipment Type:" (dropdown menu with "Equipment" selected), "Equipment Category:" (dropdown menu with "Select" selected), "Equipment Name:" (text input field), "Description:" (large text area), "Notes:" (large text area), "Energy System Name:" (text input field), "Runtime Threshold:" (text input field with "0" and a spinner), "Supplier:" (text input field), "Cost:" (text input field with "\$ 0.00" and a spinner), and "Picture Filename:" (text input field). Below these is an "Upload" button. The right column includes: "Campus:" (dropdown menu with "Select" selected), "Building:" (dropdown menu with "Select" selected), "Floor:" (dropdown menu with "Select" selected), "Room:" (dropdown menu with "Select" selected), "Location:" (text input field), "Manufacturer:" (text input field), "Model #:" (text input field), "Serial #:" (text input field), "Purchase Date:" (text input field with a calendar icon), "Install Date:" (text input field with a calendar icon), "Retire Date:" (text input field with a calendar icon), and "Warranty:" (text input field). At the bottom of the form are two buttons: "Add" (with a green checkmark icon) and "Cancel" (with a red X icon). The footer of the form contains the text "Copyright © C&S Companies 2011" on the left and "QueCentre Version: 2.0.52.2" on the right.

Figure 41 Preventive Maintenance - Add Equipment

Click on Create New Equipment

- Chose Equipment for Equipment Type
- Chose Equipment Category
- Enter a name
- Select the location by using the drop down boxes
- Fill in other information as needed
- A picture can be added to the equipment by clicking the upload button and choosing a picture from your computer
- Click Add to save

Add New Component

Components are pieces that make up a larger piece of equipment. For Example, a fan may be a component of an Air Handler Unit.

Add New Equipment

Component Associations

Equipment Type: Component

Parent Equipment: Select

Equipment Category: Select

Equipment Name:

Description:

Notes:

Energy System Name:

Runtime Threshold: 0

Supplier:

Cost: \$ 0.00

Picture Filename:

Upload

Campus: Select

Building: Select

Floor: Select

Room: Select

Location:

Manufacturer:

Model #:

Serial #:

Purchase Date:

Install Date:

Retire Date:

Warranty:

Add Cancel

Figure 42 Preventive Maintenance - Add Component

- Click on Create New component
- Chose Component for Equipment Type
- Chose Parent Equipment
- Select Equipment Category
- Enter a name
- Select the location by using the drop down boxes
- Fill in other information as needed
- A picture can be added to the equipment by clicking the upload button and choosing a picture from your computer
- Click Add to save

Procedures

Click on the Preventive Maintenance tab and then click on Procedures to open the list of Procedures. Existing Procedures can be edited and deleted from this screen. Procedures are added to Preventive Maintenance Schedules as described on page 35.

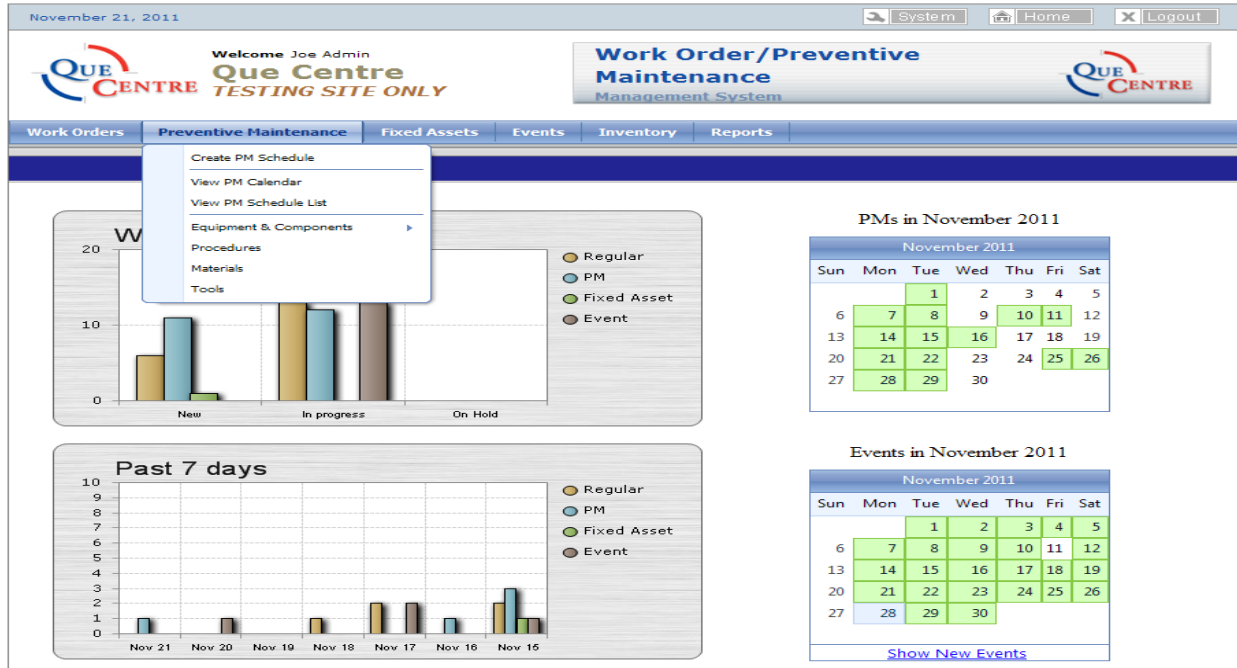


Figure 43 Preventive Maintenance – Procedures

Create New Procedure

Add New Procedure

Procedure Name:

Description:

Normal Font Size Add Image Add Document Link

Design Preview

Words: 0 Characters: 0

Add Cancel

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- Click on Create New Procedure
- Name the procedure and then enter text in the edit window. Images and documents that have already been uploaded to Que Centre (in the public documents section) may be added to the description. This is a rich text editor, so the usual word processing commands such as cut, copy, paste are available. Font size and color may be adjusted here as well.
- Click Add to save the procedure.

Materials

Materials may be added to pieces of equipment. They are created here before they can be added to a piece of equipment. Clicking on Materials on the Preventive Maintenance tab opens the Materials list.

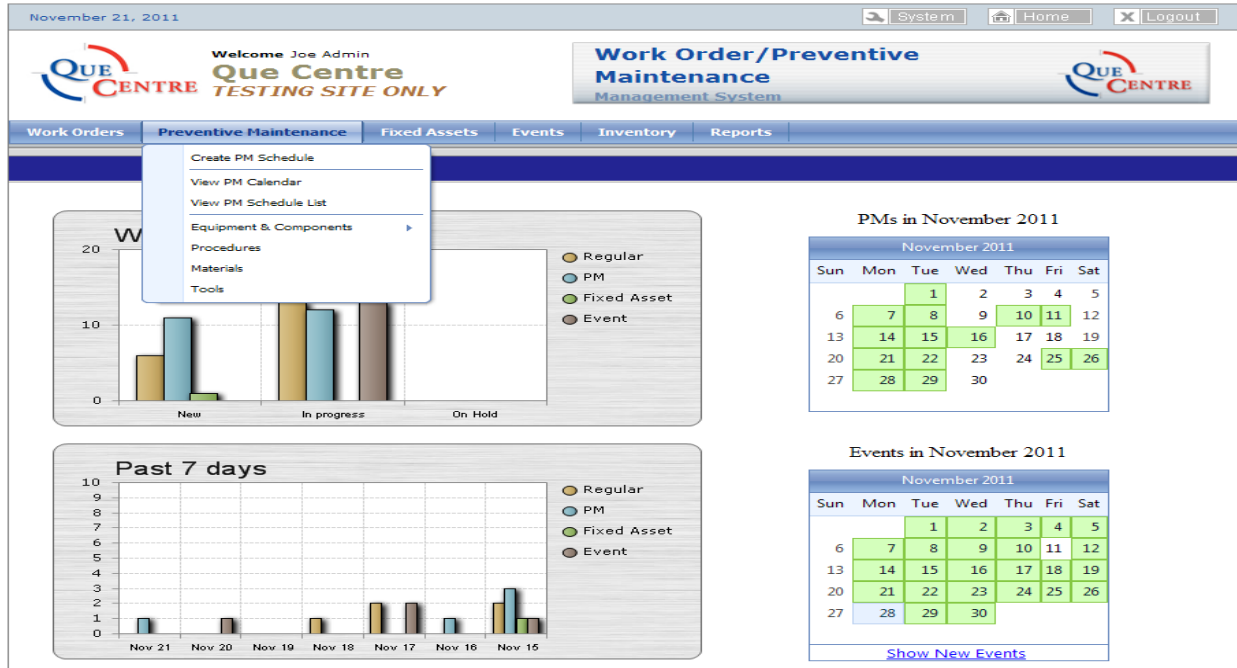


Figure 44 Preventive Maintenance - Materials

Create New Material

Materials are consumable items related to equipment such as filters, belts, etc

The screenshot shows a web-based form titled "Add New Material". The form is contained within a white box with a blue border. At the top left of the form, the title "Add New Material" is displayed. The form fields are arranged in two columns. The left column contains: "Material Name:" with a text input field; "Description:" with a larger text area; "Cost:" with a text input field containing "\$ 0.00" and a small up/down arrow icon; "Manufacturer:" with a text input field; "Model:" with a text input field; and "Serial Number:" with a text input field. The right column contains: "Supplier:" with a text input field; "Purchase Date:" with a text input field and a calendar icon; "Notes:" with a large text area; and "Warranty:" with a large text area. At the bottom center of the form, there are two buttons: "Add" with a green checkmark icon and "Cancel" with a red X icon. Below the form box, the footer text reads "Copyright © C&S Companies 2011" on the left and "QueCentre Version: 2.0.52.2" on the right.

Figure 45 Preventive Maintenance - Add New Material

- Click on Create New Material
- Name the material and add other information as needed
- Click Add to save the material.

Once saved, the material can be added to a piece of equipment.

Tools

Tools may be added to Procedures. They are created here before they can be added to a Procedure. Clicking on Tools on the Preventive Maintenance tab opens the Tools list.

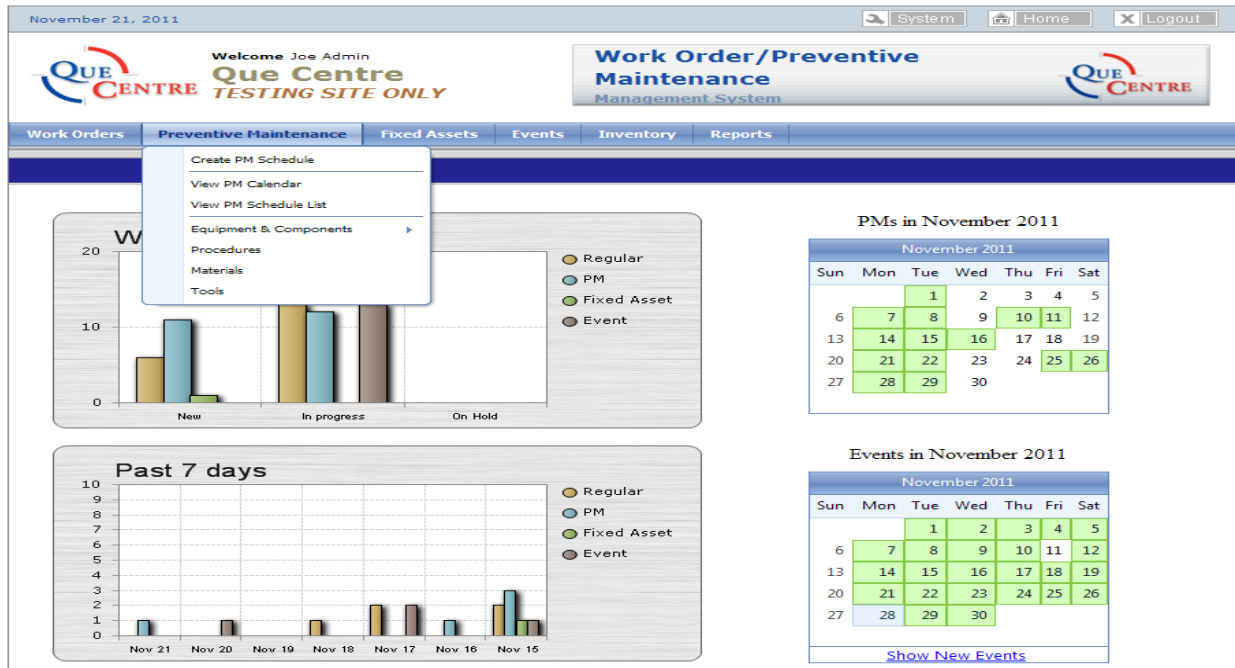


Figure 46 Preventive Maintenance – Tools

Add New Tool

Add New Tool

Tool Name: Description:

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- Name the tool and add a description of desired.
- Click Add to save the tool

Once saved, the Tool can be added to a Procedure

Fixed Assets

Clicking on the Fixed Assets tab at the top of the Dashboard will open a drop down box with Fixed Asset related choices. The choices available will depend on which privileges the logged in user has been assigned.

The screenshot shows the Que Centre Work Order/Preventive Maintenance Management System interface. The user is logged in as Joe Admin. The 'Fixed Assets' tab is active, and a dropdown menu is open, listing the following options: List Fixed Assets, Vendors, Fixed Asset Categories, Fixed Asset Classes, and Fixed Asset Accounts. The dashboard contains several data visualization components:

- Work Order Status:** A bar chart showing the number of work orders in 'New', 'In progress', and 'On Hold' states, categorized by type (Regular, PM, Fixed Asset, Event).
- Past 7 days:** A bar chart showing the number of work orders in the past 7 days, categorized by type (Regular, PM, Fixed Asset, Event).
- PMs in November 2011:** A calendar view showing the number of Preventive Maintenance (PM) activities for each day in November 2011.
- Events in November 2011:** A calendar view showing the number of events for each day in November 2011.

Several items need to be set up in Que Centre before a fixed asset can be added. These items include Fixed Asset Accounts, Fixed Asset Classes, and Fixed Asset Categories. To facilitate the entry of Fixed Assets, these items should be set up in the order listed, as described below. Typically Accounts will be the most general grouping, followed by Classes. Categories will usually be the most specific grouping.

Fixed Asset Accounts

Fixed Asset Accounts are main categories into which like asset classes will fall. Classifications mostly come from IRS tables but districts can add/edit as desired. Some examples of Accounts are Machinery & Equipment, Technology Equipment, etc.

Fixed Asset Accounts

[+ Create New Account](#) Show Deleted

Name	Description	Delete
Computer Equipment	Computer Equipment	✗
Furniture & Accessories	Furniture & Accessories	✗
Machinery & Equipment	Machinery & Equipment	✗
Scientific Equipment	Scientific Equipment	✗

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Figure 47 Fixed Assets – Accounts

Create New Account

Add New Account

Account Name: Description:

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- Click on Create New Account
- Name the account and add a description if desired
- Click add to save

Fixed Asset Classes

Fixed Asset Classes are groups of assets that need to be depreciated. Classes need to have a description, a larger asset classification (Asset Account), a life expectancy in years and dollar amount threshold beyond which depreciation must take place. Each class can have a different threshold.

Fixed Asset Classes

[+ Create New Class](#) Show Deleted

Name	Description	Account	Delete
Audio/visual Equipment	Audio/visual Equipment	Computer Equipment	✗
Carpet/Tile	Carpet/Tile	Furniture & Accessories	✗
Coin Operated Machines	Coin Operated Machines	Machinery & Equipment	✗
Custodial Equipment	Custodial Equipment	Machinery & Equipment	✗
Furniture	Furniture	Furniture & Accessories	✗
Scientific Equipment	Scientific Equipment	Scientific Equipment	✗
Technology Equipment	Technology Equipment	Computer Equipment	✗

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Figure 48 Fixed Assets - Asset Classes

Create New Asset Class

Add New Class

Fixed Asset Class

Account: Depreciate:

Class Name: Depreciation Threshold:

Description: Depreciation Period (Years):

Add Cancel

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Figure 49 Fixed Assets - Create New Class

- Click on Create New Class
- Choose an Account from the list of Accounts previously set up
- Name the Class.
- If Class depreciates, check the box next to Depreciate
- Enter Depreciation Thresholds and Depreciation Period if applicable.
- Click Add to save

Fixed Asset Categories

Fixed Asset Categories are the last item to set up before a Fixed Asset can be added to Que Centre. Categories are usually more specific terms, such as PC's, Laptops, Chair, Scientific Glassware, etc.

Fixed Asset Categories

Show Deleted

Name	Description	Class	Delete
Air Handlers		Custodial Equipment	✗
Cell Phones		Technology Equipment	✗
Chairs		Furniture	✗
Chairs	Chairs	Furniture	✗
Computer Equipment		Technology Equipment	✗
Desks	Desks	Furniture	✗
Floor Scrubbers	Floor Scrubbers	Custodial Equipment	✗
Laptop Cars		Technology Equipment	✗
Laptops		Technology Equipment	✗
Lifts		Custodial Equipment	✗
PC's		Technology Equipment	✗
Scaffolding		Custodial Equipment	✗
Scientific Glassware	Glassware used for scientific experimentation	Scientific Equipment	✗

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Figure 50 Fixed Assets – Categories

Create New Category

Add New Category

Main Details

Class:
 Description:

Category Name:

Owner or Location requirements:

 Owner
 Location
 Both
 Neither
 Either

User Groups:

 Admin Assignee
 Admin Assistant
 Administrator
 Anonymous Event Requestor
 Basic Assignee
 Basic Requestor
 Dispatcher

User Groups that can add/edit/delete Assets in this category:

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Figure 51 Fixed Asset - Create New Category

- Click on Create New Category
- Choose a Class from the list of Classes previously set up
- Name the Category and add a description if desired
- Choose whether this Class must have an owner, a location, either, neither or both
- Assign User Groups that can add/edit/delete assets in this category
- Click Add to save

Fixed Assets

Once Fixed Asset Accounts, Classes and Categories have been set up in Que Centre, Fixed Assets can be added.

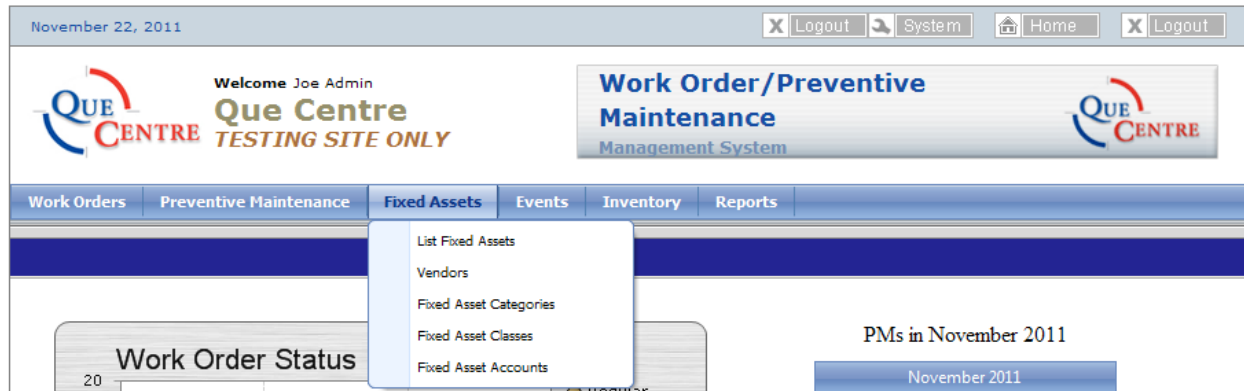


Figure 52 Dashboard - Fixed Assets

List Fixed Assets

Clicking on List Fixed Assets under the Fixed Assets tab will open the list of fixed assets.

Fixed Assets

Filters: Category: *Filter By Category* Location: *Filter By Location* Vendor: *Filter By Vendor*

Search: Bulk Operations Export Fixed Assets

[Create New Fixed Asset](#) Show Deleted

Page 1 of 2 Item 1 to 25 of 29

<input type="checkbox"/>	Name	Description	Category	Assigned To	Depreciated Value	Delete
<input type="checkbox"/>	300 ml beaker	glass beaker used to measure liquid	Scientific Glassware		\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	A Test Asset		Cell Phones	Cleaner, Bill	\$ 1,086.90	<input type="checkbox"/>
<input type="checkbox"/>	AT254	This is Joe's main desktop computer.	PC's	Mechanic, Joe	\$ 297.70	<input type="checkbox"/>
<input type="checkbox"/>	BLB6178		Cell Phones	Custodian, Joe	\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	Bunson Burner		Scientific Glassware		\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	dfssdfsdf		Cell Phones	Custodian, Joe	\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	dfssdfsdf		Cell Phones	Custodian, Joe	\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	Dell 1500		Computer Equipment	Secretary, Sue	\$ 2,023.84	<input type="checkbox"/>
<input type="checkbox"/>	Dell 2200		PC's	Secretary, Sue	\$ 704.80	<input type="checkbox"/>
<input type="checkbox"/>	Dell 5750		Laptops		\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	Dell Latitude Laptop	New Dell D630	Computer Equipment	Mechanic, Joe	\$ 857.04	<input type="checkbox"/>
<input type="checkbox"/>	Dell Latitude Laptop	New Dell D630	Computer Equipment	Mechanic, Joe	\$ 857.04	<input type="checkbox"/>
<input type="checkbox"/>	Droid		Cell Phones	Admin, Joe	\$ 494.05	<input type="checkbox"/>
<input type="checkbox"/>	Floor Scrubber		Floor Scrubbers	Cleaner, Bill	\$ 0.00	<input type="checkbox"/>
<input type="checkbox"/>	HP 2345		Computer Equipment	Cleaner, Bill	\$ 1,500.00	<input type="checkbox"/>
<input type="checkbox"/>	HP 7800		PC's	Tech, Joe	\$ 691.67	<input type="checkbox"/>
<input type="checkbox"/>	HP 7800		PC's	Tech, Joe	\$ 225.19	<input type="checkbox"/>
<input type="checkbox"/>	HP 788sff	Teacher Computer	PC's		\$ 0.00	<input type="checkbox"/>

Figure 53 Fixed Assets - List Fixed Assets

The list may be filtered by using the Category, Location and Vendor Filters. The list is also searchable by any field associated with a fixed asset. Fields could be name, PO #, location, assigned to, etc.

Create New Fixed Asset

Add New Fixed Asset

Main Details

Category:

Name:

Assigned To:

Manufacturer:

Model Number:

Serial Number:

Part Number:

Tag Number:

Vendor:

Purchase Order #:

Bar Code Id:

Campus:

Building:

Floor:

Room:

Location:

Description:

Property Cost:

Purchase Date:

Install Date:

Warranty Expiration:

Warranty:

Notes:

Picture Filename:

Additional Information

No additional information required.

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Figure 54 Fixed Asset - Create New Fixed Asset

- Click on Create New Fixed Asset
- Choose a Category from the list of Categories previously set up
- Name the Fixed Asset
- Fixed Assets must have a cost.
Fixed Assets must have a purchase date
- Fill in Assigned to and/or location if this Fixed Asset Class requires that information
- Fill in Additional information as needed, keeping in mind these are the fields that will be searchable in the search box on the list fixed asset screen.
- Click Add to save

Once a Fixed Asset has been saved, it can be edited by clicking on it in the list of Fixed Assets. Depreciation history will show if available as well as history of creation and editing of the Fixed Asset.

Events

Events and how they work

Provided by James Van Dick, Programmer

User Group Privileges

- View – As long as a user group has the privilege for having the Events module available, the users associated with that group will be able to view Events
- Create – User can create an event
- Create Edit – User can edit events he/she is the contact of
- Approver – User can be approver of an event (location or calendar category)
- Approver Edit – User can Edit Events she/he is approver of

Owners

Owners are people who own either a Location or Event Category.

- This is not a privileges setting but an assignment associated with a location or event category
- If the location changes, the owner of the original location is removed and the owner of the new location is added

Approvers

Approvers are assigned to a location – similar to an owner.

- In order to be an Approver, the person must have the Approver privilege (see above)
- A location can't have approvers unless there is an owner for the location
- If the location changes, the approvers of the original location are removed and the approvers of the new location are added

Approving Event

The Approvers mentioned above shall be able to Approve or Reject an Event. Below are the rules:

- Automatic updating of the event status described below shall only occur if the current event status category is 'New'
- When all approvers have made their vote, the event will status will be based on the approvers vote:
 - If all approvers approve the event – the status changes to 'Event Approved'
 - If any approver rejects the event – the status is changed to 'Event Rejected'

Event Menu

- Anyone who is associated with a user group that has the events module selected will have the ability to get to Events via the calendar or list
- The Event Calendars and Event Calendar Categories will be available to those who have Approver privileges or is an owner of a Category

Event Calendar

The following rules shall apply:

- If a user has no privileges, he/she will be able to click on an event and view it
- Other user privileges are based on ownership/approver/creator etc. See Event privileges below

Public Event Calendar

The following rules shall apply:

- Get to it by including the following in the url: [eventscalendar - \(www4.quecentre.com/RomeCSD/eventscalendar\)](http://www4.quecentre.com/RomeCSD/eventscalendar)
- Will show the calendar but not allow the user to go to the Event Form
- Calendar will not show any events associated with Calendars that are designated as Hidden From Public

Event Form

The following rules shall apply:

- If a user has no privileges, he/she will be able to click on an event and view it
- Other user privileges are based on ownership/approver/creator etc. See Event privileges below

Event List

The following rules shall apply:

- Approvals - Will show New Events (category) that need to be Approved by the user logged in
- My Events – Will show New and Approved Events that the user is the contact for
- My Locations – Will show New and Approved Events that are associated with locations the user is associated with

Event Communications

An email will be sent for all people associated with the event when:

- The Event is created
- The status changes
- The following fields changes:
 - Location
 - Start and End Time/Date
 - Recurrence information
 - There are comments in the Additional comments field on the Communications tab

Event Editing Rules

Whether a user can edit an event is based on privileges, ownership and status. The following rules shall apply:

Privilege	Status	Contact	Approver	Owner	Creator	Can Create	Can Edit	Can Delete	Can Approve / Reject	Update Status
Creator	New Event	No	No	No	No	Yes	N/A	N/A	No	No
Creator	New Event	Yes	No	No	No	N/A	No	No	No	No
Creator Editor	New Event	Yes	No	No	No	N/A	Yes	Yes	No	No
Creator Editor	Not New Event	Yes	No	No	No	N/A	No	No	No	No
Creator Editor	New Event	No	No	No	No	N/A	No	No	No	No
Approver	New Event	No	Yes	No	No	N/A	No	No	Yes	No
Approver	Not New Event	No	Yes	No	No	N/A	No	No	No	No
Approver Editor	New Event	No	Yes	No	No	N/A	Yes	Yes	Yes	No
Approver Editor	Not New Event	No	Yes	No	No	N/A	No	No	No	No
Owner (Location / Category)	New Event	No	No	Yes	No	N/A	Yes	Yes	Yes	Yes
Owner (Location / Category)	Not New Event	No	No	Yes	No	N/A	Yes	Yes	Yes	Yes

Note: There are many other scenarios but above shows the most important ones.

Other Rules:

- The Events module needs to be active for the user group the user is associated with
- Only an Owner of the event (Category or Calendar Category) can manually update the status
- If the user is an owner, the owner privileges trump all other privileges regardless of whether the person is a creator or approver.
- An Owner does not need any particular privileges (other than the active Event)
- An owner can override any approvals at any time by manually updating the status.
- There can be up to 2 owners – one for the location and the other for the calendar category
- If there is only one location owner, it is assumed that the owner is the owner of all locations

Events (cont)

Clicking on the Events tab at the top of the Dashboard will open a drop down box with Events related choices. The choices available will depend on which privileges the logged in user has been assigned.

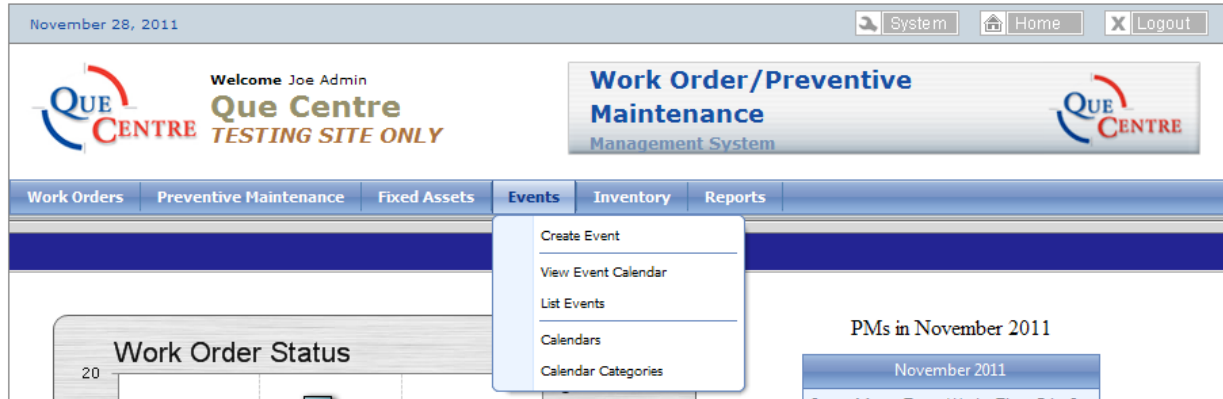


Figure 55 Dashboard – Events

Before an Event can be created, Calendars and Calendar Categories need to be set up in Que Centre.

Calendars

Calendars are usually created according to the Events they will show, rather than the location associated with the Event. When viewing the Calendar, events can be filtered by location if desired. To view a list of Calendars already created, click on Calendars under the Events Tab.

Event Calendars				
+ Create New Event Calendar				<input type="checkbox"/> Show Deleted
Calendar Name	Color	Description	Delete	Block
Athletics	Text	Athletics	<input type="checkbox"/>	<input type="checkbox"/>
Board of Education	Text	Board of Education	<input type="checkbox"/>	<input type="checkbox"/>
Community Activities	Text	Community Activities	<input type="checkbox"/>	<input type="checkbox"/>
Community Education	Text	Community Education	<input type="checkbox"/>	<input type="checkbox"/>
District Wide	Text	District Wide	<input type="checkbox"/>	<input type="checkbox"/>
New Calendar	Text	New Calendar	<input type="checkbox"/>	<input type="checkbox"/>

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Figure 56 Events – Calendars

Create New Calendar

Click on Create New Event Calendar on the Calendar list screen

Add New Calendar

Event Calendar Name:

Description:

Private:

Hidden from Public:

Choose Display Color:

Text Color:

Background Color:

Categories:

- Athletic Events
- BOE Meetings
- BOE Work Session
- Community Activities
- Computer Classes
- Dances
- General Meetings
- JV
- Performing Arts Boosters

Categories assigned to this Calendar:

Hint: To move an item, drag to the other window or highlight it and click arrow. (Ctrl + Left-Click to select multiple)

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Figure 57 Events - Create Calendar

- Name the Calendar and fill in description.
- Check Hidden from Public if applicable. Events Hidden from Public do not show up on the public calendar.
- Change Text and Background color as needed
- Assign Calendar Categories to the Calendar by clicking and dragging from the left side to the right or by highlighting and using the right facing arrows.
- If no Calendar Categories have been set up, see directions in next section “Create New Calendar Category”
- Click Add to save

Calendar Category

Calendar Categories groupings for events on a Specific Calendar. For Example, Categories that may be associated with an Athletic Calendar might include Boys Varsity Sports, Girls Varsity Sports, or possible individual sports such as Football, Volleyball, etc. To view a list of Calendar Categories already created, click on Calendar Categories and the Events Tab.

Event Categories

Category Name	Description	Calendar	Delete	Block
Athletic Events	Athletic Events	Athletics	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BOE Meetings	BOE Meetings	Board of Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BOE Work Session	BOE Work Session	Board of Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community Activities	Community Activities	Community Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Computer Classes	Computer Classes	Community Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dances	Dances	New Calendar	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Meetings	General Meetings	District Wide	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JV	JV	Athletics	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Performing Arts Boosters	Performing Arts Boosters	Community Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Personal Enrichment	Personal Enrichment	Community Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PTSA	PTSA	Community Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sports Boosters	Sports Boosters	Community Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Varsity	Varsity	Athletics	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Figure 58 Events - Calendar Categories

Create New Calendar Category

Click on Create New Calendar Category

Add New Category

Category Name: Owner:

Description: Private:

Calendar: Hidden from Public:

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Figure 59 Events - New Calendar Category

- Name the Category and fill in a description.
- Specify an owner if needed. (See the [Events and how they work](#) for information on Category Owners)
- Select a Calendar to which this Category belongs (Calendars must be set up prior to creating a Category)
- Check Hidden from Public if applicable
- Click Add to save

Create Event

Clicking Create Event under the Events tab opens the Event form. This can also be accessed by double clicking on a date on the Events Calendar.

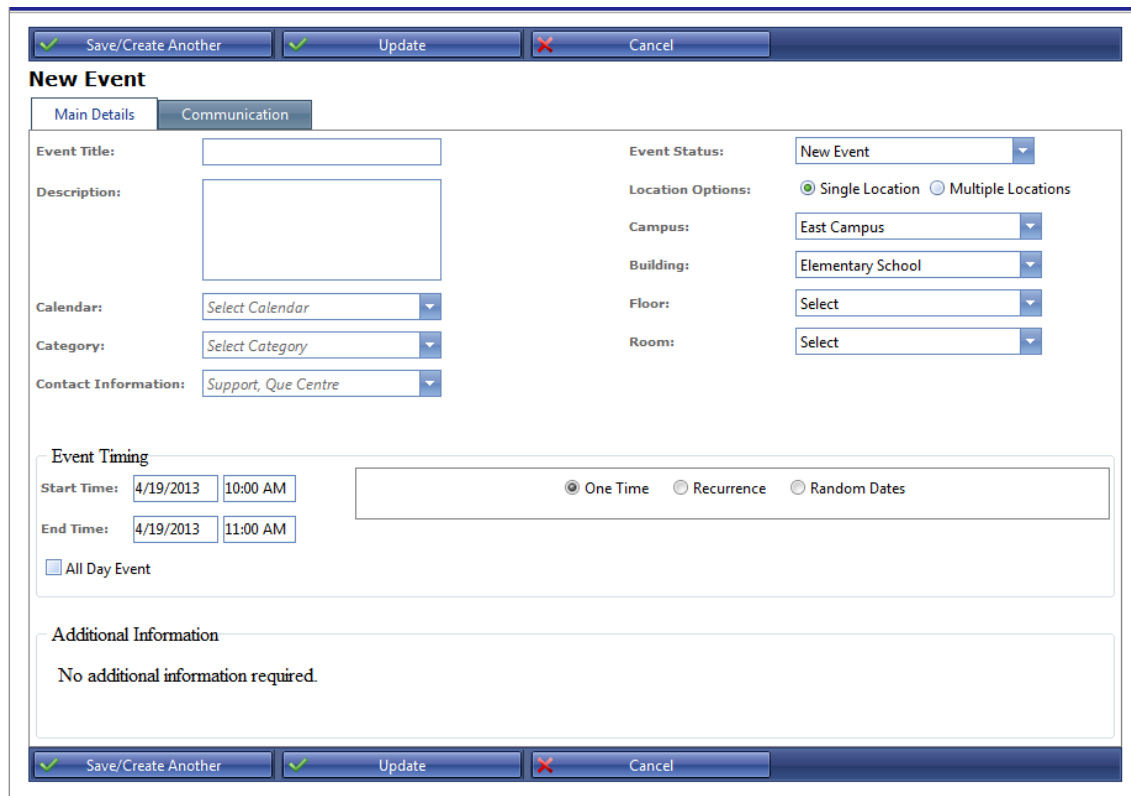


Figure 60 Create New Event

- Name the Event and add a Description
- Choose a Calendar from the dropdown list
- Choose a Category from the dropdown list
- Contact information displays logged in user, change if needed
- Select Status, if logged in user has appropriate privileges
- Select a location. A full location including Campus, Building, Floor and Room must be selected
- Change Date and Time if needed.
- Check Recurrence if this not a onetime event. See [Recurrence](#) section for details
- Check All Day Event if applicable
- Fill out Additional Details as needed. These are custom fields and can be tailored to individual needs.
- Click Update to save

Event Recurrence

Events that recur in a regular pattern can be added all at once using the Event Timing Section. Checking the Recurrence box will show choices for Daily, Weekly, Monthly or Yearly recurrences. The options for each change as they are selected.

✓ Save/Create Another
✓ Update
✗ Cancel

New Event

Main Details

Communication

Event Title:

Description:

Calendar:

Category:

Contact Information:

Event Status:

Location Options: Single Location Multiple Locations

Campus:

Building:

Floor:

Room:

Event Timing

Start Time:

End Time:

All Day Event

One Time
 Recurrence
 Random Dates

Daily
 Weekly
 Monthly
 Yearly

Recur every week(s) on
 Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

End after occurrences
 End by

Figure 61 Events – Recurrence

Once a recurring event is saved, the list of instances (recurrences) can be viewed on the Instances tab of the Event.

Event: 18 - Boy Scout Meeting			
Main Details	Approvers	Instances	Work Orders
Page 1 of 3		Item 1 to 25 of 53	
Title	Scheduled Date	Status	Conflicts
Boy Scout Meeting	11/1/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/5/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/8/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/12/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/15/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/19/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/22/2011 6:00 PM To 7:30 PM	Event Closed	
Boy Scout Meeting	11/26/2011 6:00 PM To 7:30 PM	Event Approved	
Boy Scout Meeting	11/29/2011 6:00 PM To 7:30 PM	Event Approved	
Boy Scout Meeting	12/3/2011 6:00 PM To 7:30 PM	Event Approved	

Random Dates

Events that are recurring but do not follow a regular pattern can be scheduled using the Random Date recurrence option.

✓ Save/Create Another✓ Update✗ Cancel

New Event

Main DetailsCommunication

Event Title:

Description:

Calendar:

Category:

Contact Information:

Event Status:

Location Options: Single Location Multiple Locations

Campus:

Building:

Floor:

Room:

Event Timing

Start Time:

End Time:

All Day Event

One Time Recurrence Random Dates

◀◀ April 2013 - July 2013 ▶▶

April							May						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
31	1	2	3	4	5	6	28	29	30	1	2	3	4
7	8	9	10	11	12	13	5	6	7	8	9	10	11
14	15	16	17	18	19	20	12	13	14	15	16	17	18
21	22	23	24	25	26	27	19	20	21	22	23	24	25
28	29	30	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
June							July						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
26	27	28	29	30	31	1	30	1	2	3	4	5	6

- When “Random Dates” is selected, a calendar interface will display, allowing user to scroll through and select dates as needed.
- Calendar interface will allow user to scroll o different weeks, months and years
- Events created using Random Dates will not be linked as multiple instances of an event, but will be separate events
- Notification emails will be sent as they usually are for a non recurring onetime event
- Deleting one occurrence of the events in a random date series will not delete the remaining events
- Start Date and End Date boxes are hidden when Random Dates is selected
- Multiple Location option for events is not available when Random Dates is selected
- Random Dates option is not available when Multiple Locations option is selected

Random Dates (cont)

Event Timing

Start Time:

End Time:

All Day Event

One Time Recurrence Random Dates

April 2013 - July 2013

April							May						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
31	1	2	3	4	5	6	28	29	30	1	2	3	4
7	8	9	10	11	12	13	5	6	7	8	9	10	11
14	15	16	17	18	19	20	12	13	14	15	16	17	18
21	22	23	24	25	26	27	19	20	21	22	23	24	25
28	29	30	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
June							July						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
26	27	28	29	30	31	1	30	1	2	3	4	5	6
2	3	4	5	6	7	8	7	8	9	10	11	12	13
9	10	11	12	13	14	15	14	15	16	17	18	19	20
16	17	18	19	20	21	22	21	22	23	24	25	26	27
23	24	25	26	27	28	29	28	29	30	31	1	2	3
30	1	2	3	4	5	6	4	5	6	7	8	9	10

Done

A “Done button is available on the calendar which when clicked will display a list of dates chosen which must be clicked before saving.

Event Timing

Start Time:

End Time:

All Day Event

One Time Recurrence Random Dates

Selected Dates:
4/10/2013, 4/23/2013, 5/14/2013, 6/4/2013, 7/2/2013, 7/15/2013, 7/25/2013

Edit

- The calendar interface is replaced with a list of the dates that were selected
- The “Done” button is replaced with an “Edit” button
- Clicking the edit button will show the calendar interface and the selected dates can be changed

Communication

Emails are sent to all users associated with the Event. This includes the requester and any approvers or owners. Additional people may be emailed by selecting them on the Communication tab of the Event form.

Event:

Main Details | **Communication** | Work Orders

Users:

- Admin, Joe
- Custodian, Joe
- Secretary, Sue
- Support, Que Centre
- Tech, Joe
- Van Dick, Jim

Additional users to get CC

Mail Comments:

Hint: To move an item, drag to the other window or highlight it and click arrow. (Ctrl + Left-Click to select multiple)

Update Cancel

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Figure 62 Events – Communication

Event Work Orders

Work orders can be created for an Event once the Event is at the Approved status. Once approved, a check box for Pre Date Work orders is available below the Location information. Clicking the box brings up the Work Orders Detail section.

Figure 63 Events - Pre Date Work Order

- Select a Service Area for the Work Order
- Select the number of Pre Date Days. This determines how many days prior to an Event a Work Order is created. Work Orders are generated at Midnight on the day requested. For example, an Event scheduled to occur on Thursday with a 1 day Pre Date Work order would generate the Work Order at 12 AM on Wednesday.
- The Pre Date Work Order can be assigned at this point or when the Work Order is generated as New.

Event: 18 - Boy Scout Meeting

Number	Description	Status
23	Boy Scout Meeting	Approved
29	Boy Scout Meeting	Approved
33	Boy Scout Meeting	Approved
41	Boy Scout Meeting	Approved
43	Boy Scout Meeting	Approved
55	Boy Scout Meeting	Approved
59	Boy Scout Meeting	Approved

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Figure 64 Events - Work Orders

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Once an Event Work Order has been generated, it will appear in a list on the Work Orders tab of the Event. The Work Orders are listed by Work Order Number and can be viewed by clicking the hyperlink.

Conflicts

A conflict occurs if an event is scheduled for the same time and location as another event. Conflicts are shown on the Calendar in Red and also on the Conflicts tab of the event.

Event: 66 - Honor Society

Main Details | Approvers | Communication | **Conflicts** | Work Orders

Title	Description	Scheduled Date	Created	Status
BOE Meeting	BOE Meeting	11/24/2011 7:00 PM To 9:00 PM	Que Centre Support Wednesday, October 26, 2011 8:52:11 AM	Event Approved

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Figure 65 Events - Conflicts

Only the second event, i.e., the one that created the conflict will display as a conflict. The first event is considered superior in the conflict. Conflicts can be resolved when someone with the appropriate privileges edits either event's time or location.

Approvers

Approvers for an event are listed on the Approvers tab. If an approver has already voted, their response is shown here. If the logged in user is an approver, he/she can cast their vote on the Approvers tab. If all Approvers have voted to approve the event, the event status is changed to Approved. If one or more Approvers have voted to reject the event, the event status is set to rejected. See [Approvers](#) in the Events and how they work section

View Events Calendar

Clicking on View Events Calendar under the Events tab will open the Event Calendar. The Event Calendar can also be opened by double clicking on a date on the small Event Calendar displayed on the Dashboard.

If the logged in user has sufficient privileges, events can be edited from the Calendar either by dragging the event to another day or by double clicking the event. If it is a recurring event, the user is given the choice of editing the instance or the series.

List Events

Clicking on List Events under the Events tab will open a list of events the logged in user has created, is the location owner of or is an approver of.

Approvals

The Approvals tab lists all events the logged in user needs to approve. If an event has a conflict, the conflict can be viewed by clicking the view hyperlink in the conflict column. Events awaiting approval can be viewed by clicking on the name of the event. If there is more than one event, multiple events can be selected by checking the check box next to the event name. Then all selected events can be approved or rejected by using the Bulk Operations button.

<input type="checkbox"/>	Event Name	Description	Location	Dates	Status	Conflict
<input type="checkbox"/>	Honor Society	Honor Society	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/24/2011	New Event	View

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Figure 66 List Events – Approvals.

My Events

The My Events tab shows events the logged in user has created. Events and conflicts can be viewed and, if the logged in user has sufficient privileges, edited.

Create New Event	Event Name	Description	Location	Dates	Status	Conflict	Deletes
	Honor Society	Honor Society	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/24/2011	New Event	View	<input checked="" type="checkbox"/>
	Book Fair	Book Fair	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/30/2011 12/1/2011 12/2/2011	Event Approved		<input checked="" type="checkbox"/>
	Thanksgiving parade	Thanksgiving parade	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/23/2011	Event Approved		<input checked="" type="checkbox"/>
	Product Testing	Product Testing	Campus: East Campus Building: High School Floor: 1st Floor Room: Auditorium	11/8/2011 11/12/2011 11/15/2011 11/19/2011 More	Event Approved		<input checked="" type="checkbox"/>
	Roller Skating Party	Roller Skating Party please join us!	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 102	11/18/2011 11/25/2011 12/2/2011 12/9/2011 More	Event Approved		<input checked="" type="checkbox"/>
	Winter Sports Kickoff	Celebration to kickoff the winter sports season	Campus: East Campus Building: High School Floor: 1st Floor Room: Gymnasium	11/29/2011	Event Approved		<input checked="" type="checkbox"/>

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Figure 67 Events - My Events

My Location Events

The My Location Events tab shows the events for a location that the logged in user is an owner of. Events and conflicts can be viewed and, if the logged in user has sufficient privileges, edited.

Approvals My Events My Location Events					
<input type="checkbox"/> Show Conflicts Only <input type="checkbox"/> Include Rejected					
Page 1 of 2					Item 1 to 10 of 15
Event Name	Description	Location	Dates	Status	Conflict
Honor Society	Honor Society	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/24/2011	New Event	View
Pep Rally	Pep Rally	Campus: East Campus Building: High School Floor: 1st Floor Room: Gymnasium	11/30/2011	Event Approved	
Zumba	Zumba	Campus: East Campus Building: High School Floor: 1st Floor Room: Gymnasium	11/22/2011 11/23/2011 11/29/2011 11/30/2011 More	Event Approved	
Book Fair	Book Fair	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/30/2011 12/1/2011 12/2/2011	Event Approved	
Thanksgiving parade	Thanksgiving parade	Campus: East Campus Building: Elementary School Floor: 1st Floor Room: Classroom 101	11/23/2011	Event Approved	
Product Testing	Product Testing	Campus: East Campus Building: High School Floor: 1st Floor	11/8/2011 11/12/2011 11/15/2011	Event Approved	

Figure 68 Events - My Location Events

Inventory

Consumable items that need to be tracked are considered Inventory. Among other things, this could include paper supplies, cleaning supplies, etc

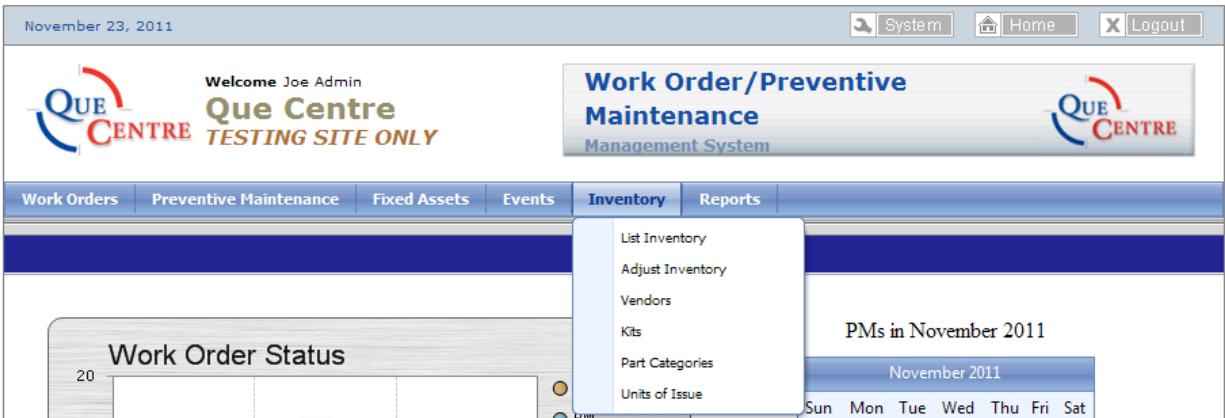


Figure 69 Dashboard - Inventory

Before an inventory part can be added to Que Centre, a Parts Category and units of issue must be created.

Parts Categories

Click on Parts Categories under the Inventory tab to display a list of Parts Categories

The screenshot shows the 'Part Categories' page. It features a '+ Create New Category' button and a 'Show Deleted' checkbox. Below is a table with columns for 'Category Name', 'Description', 'Delete', and 'Block'. The table lists five categories: 'Cleaning Supplies', 'Grounds Supplies', 'Hardware Supplies', 'Mechanical Supplies', and 'Office Supplies'. Each row has a red 'X' in the 'Delete' column and a lock icon in the 'Block' column.

Category Name	Description	Delete	Block
Cleaning Supplies		X	🔒
Grounds Supplies		X	🔒
Hardware Supplies		X	🔒
Mechanical Supplies		X	🔒
Office Supplies		X	🔒

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Figure 70 Inventory - Parts Category

Create New Parts Category

Click on Create New Category

Add New Part Category

Part Category Name: Description:

Reorder Contact User:

User Groups not allowed to view this category:

- Admin Assignee
- Admin Assistant
- Administrator
- Anonymous Event Requestor
- Basic Assignee
- Basic Requestor
- Dispatcher

User groups that can view this category:

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- Name the Part Category and add a description
- Select the User Groups that can view this category by clicking and dragging from the left side to the right side or by highlighting a user group and clicking the single right facing arrow.
- Click Add to save.

Units of Issue

Units of issue are also called units of measure. Clicking on Units of Issue under the Inventory tab opens a list of existing Units of Issue.

Units of Issue

Show Deleted

Unit of Issue Text	Unit Of Issue Value	Delete
Box	bx	<input type="checkbox"/>
Case	cs	<input type="checkbox"/>
Each	ea	<input type="checkbox"/>
gallons	1	<input type="checkbox"/>
Package	pk	<input type="checkbox"/>
Quarts	Qts	<input type="checkbox"/>



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Figure 71 Inventory - Units of Issue

Create New Unit of Issue

Click on Create New Unit of Issue

Add New Unit Of Issue

Unit of Issue Text:	<input type="text"/>	Unit of Issue Value:	<input type="text"/>
 Update		 Cancel	

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- Fill in the Unit of Issue Text. This will display in the Inventory Module.
- Assign a Unit of Issue Value, which is an abbreviation for the unit such as ea, cs, qt, etc
- Click Update to save

Vendors

Vendors can be added either under the Inventory tab or under the Fixed Asset tab. Clicking on Vendors under either tab will display a list of vendors. Both places will display the same list of vendors.

Inventory Vendors

[Create New Vendor](#) Show Deleted

Vendor	Description	Contact	Phone	Delete	Block
▶ ABC Carpet				✗	🔒
▶ Ace Computing	Ace Computing			✗	🔒
▶ Amazon	Amazon			✗	🔒
▶ Apple Computer				✗	🔒
▶ Johnstone Supplies				✗	🔒
▶ Lowe's	Lowe's			✗	🔒
▶ Mary's Cleaning Supplies		Marv		✗	🔒
▶ Sam's Hardware Place				✗	🔒
▶ School Supply				✗	🔒
▶ Staples	Office Supplies			✗	🔒

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Figure 72 Inventory – Vendors

Create New Vendor

Click on Create New Vendor.

Add New Vendor

Vendor Name: Vendor Number:

Description: Contact Name:

Address: Phone Number:

Email Address:

Notes:

Logo Filename:

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Figure 73 Inventory - Create Vendor

- Fill in Vendor name and other information as needed.
- A logo may be uploaded from your computer by clicking the upload logo button.
- Click Add to save

List Inventory

Clicking on List Inventory under the Inventory tab displays a list of Inventory in Que Centre.

Inventory Parts

Vendor: Category: Inventory Threshold:

Show Backorder Show Deleted

Name	Description	Category	Unit	Unit Cost	Qty	Reorder Threshold	Delete	Block
3 M Glass Cleaner Concentrate	Non streaking General Purpose glass cleaner.	Cleaning Supplies		\$13.00	59	10	✗	🔒
3 M Heavy Duty Multi surface cleaner	Heavy Duty Multi surface cleaner	Cleaning Supplies	Case	\$10.00	68	5	✗	🔒
3434234	43234234	Cleaning Supplies	Case	\$12.00	123	112	✗	🔒
3H 3M Neutral Cleaner 3H	No rinse cleaner can be used in automatic scrubber	Cleaning Supplies	Case	\$10.00	48	5	✗	🔒
3M Fresh Scent Deodorizer	2L bottle	Cleaning Supplies	Case	\$10.00	144	5	✗	🔒
3M Doodle Bug	Blue Pad Refills for medium scrubbing jobs	Cleaning Supplies	Each	\$10.00	78	5	✗	🔒
AAA 5" blue Batteries	AAA 5" Batteries	Cleaning Supplies	Box	\$10.00	170	5	✗	🔒
AMD Degreaser Safety Solvent	Silicone aerosol spray lubricant	Cleaning Supplies	Case	\$10.00	21	5	✗	🔒
Anchor Plastic 3/8	Anchor Plastic 3/8	Hardware Supplies	Case	\$10.00	160	5	✗	🔒
Broom	Broom	Cleaning Supplies	Each	\$10.00	4	2	✗	🔒
Cop tubing-1	Plumb 1/4	Hardware Supplies	Case	\$10.00	27	5	✗	🔒

Figure 74 Inventory - List Inventory

The list can be filtered by Vendor, Category and Inventory Threshold. Details about the inventory can be seen by clicking on the name of supply.

Create New Part

Click on Create New Part

Add New Part

Category:

Part Name:

Description:

Manufacturer:

Vendor:

Model #:

Stock #:

Unit Of Issue:

Notes:

Logo Filename:

Campus:

Building:

Floor:

Room:

Location:

In Stock:

Backorder:

Cost:

Reorder Threshold:

Include In Equipment Materials

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Figure 75 Inventory - Create New Part

- Select Category
- Name the Part and add a description.
- Select a Vendor from the dropdown box
- Select Unit of Issue from the dropdown box
- Select a location by using the dropdown boxes
- Add number in stock
- All inventory must have a price and a reorder threshold.
- Fill n backorder if appropriate
- Check the box next to Include in Equipment Materials if appropriate
- Click Add to save

Adjust Inventory

Inventory amounts can be adjusted from the Parts detail screen or from the Adjust Inventory Screen. Clicking Adjust Inventory from the Inventory tab opens a list of Inventory

The screenshot shows the 'Adjust Inventory' interface. At the top, there are dropdown menus for 'Vendor: Select', 'Category: Select', and 'Default Operator: +', along with an 'Apply Global Comment' button. Below this is a table with two columns of parts. Each row contains a 'Part Name', 'Cur', 'B/O', and 'Qty' field. The 'Qty' field includes a numeric input box, a dropdown for the operand (+, -, =), and a button with an ellipsis (...). At the bottom of the table, there are two buttons: 'Update' (with a green checkmark) and 'Reset Form' (with a red X).

Part Name	Cur	B/O	Qty	Part Name	Cur	B/O	Qty
2223	123	1	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	22332	122	12	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
3 M Glass Cleaner Concentrate	59	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	3 M Heavy Duty Multi surface cleaner	68	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
3434234	123	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	3H 3M Neutral Cleaner 3H	48	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
3M Fresh Scent Deodorizer	144	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	3M Doodle Bug	78	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
AAA 5" blue Batteries	170	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	AMD Degreaser Safety Solvent	21	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Anchor Plastic 3/8	160	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Broom	4	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Cop tubing-1	27	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Disposable Latex gloves -small	0	3	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Drain Opener	10	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Ice Scraper	3	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Jim	1	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	New Item	33	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Paper	10	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Plumbing-110	13	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>

Figure 76 Inventory - Adjust Inventory

Adjustments can be made to multiple Inventory Parts at once.

Enter the quantity you want to adjust up or down in the Qty box then make sure the operand is set to + or - or = as appropriate.

Enter comments for that part by clicking on the button with the ellipsis (...). These comments will be displayed on an Inventory Report. Click Update to save the changes

Kits

Kits are groups of parts that might be used together or for a specific process. Clicking on Kits under the Inventory tab displays a list of Kits created in Que Centre.

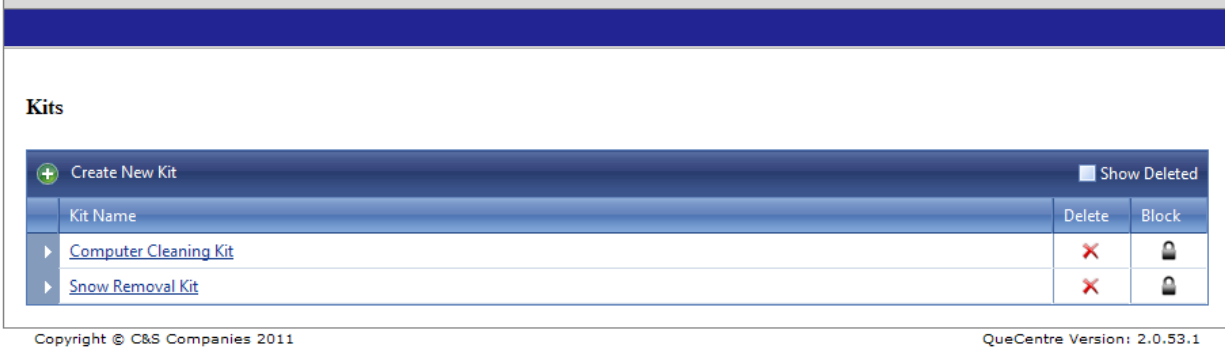


Figure 77 Inventory – Kits

Create New Kit

Click Create New Kit

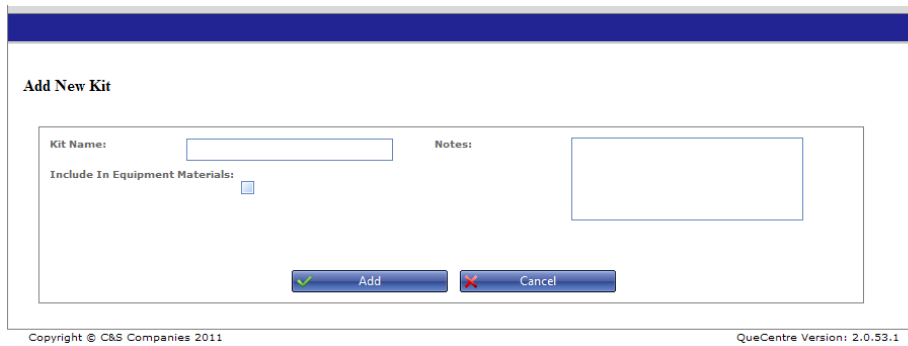


Figure 78 Inventory - Create New Kit

- Name the kit and add notes as needed
- Check the Include in Equipment Materials if appropriate
- Click Add to save

Once saved parts can be added to the kit.

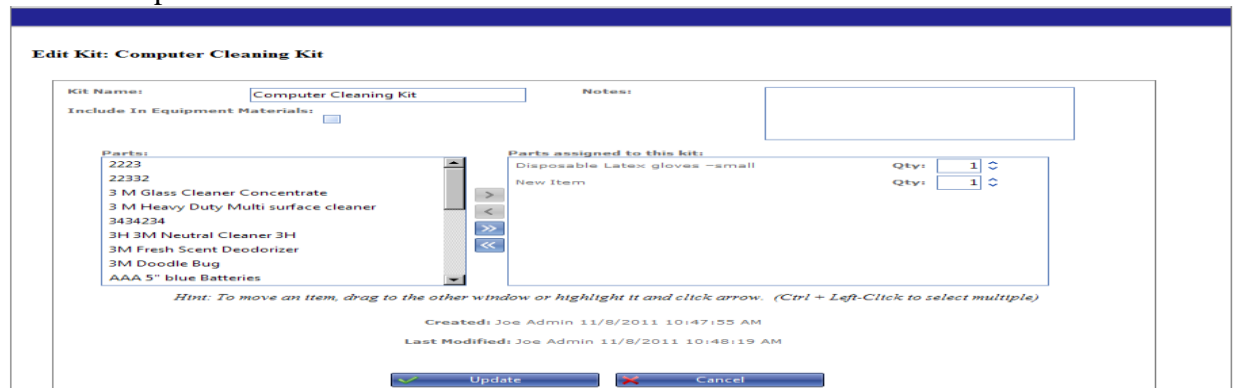


Figure 79 Inventory - Edit Kit

Move parts from the left side of the screen to the right by clicking and dragging or highlighting the part and clicking the single right facing arrow. Click Update to save the changes.

Using Inventory on Work Orders

If the logged in user has privileges to use inventory, the Inventory tab will appear on the create work order screen next to the Work Order Detail tab. Clicking the Inventory tab will result in displaying the Inventory selections. Users may see different Inventory Categories based on their view privileges.

Create New Work Order

Work Order Contact Please be as detailed as possible.

Contact Information: Edwards, Ann

Save

Save & Print

Work Order List

Work Order Details | Inventory

Parts not currently assigned:

- Office Supplies
- Custodial Supplies
- AV Supplies
- Art Supplies

Parts assigned:

Parts Total Cost: \$0.00

Kits not currently assigned:

Kits assigned:

Kits Total Cost: \$0.00

Total Cost: \$0.00

Hint: To move an item, drag to the other window or highlight it and click arrow. (Ctrl + Left-Click to select multiple)

Figure 80-Inventory tab

Inventory Categories

Expand the Inventory Categories by clicking on the plus sign next to the category name. This will expand to show a list of inventory items under that category

Work Order Details | Inventory

Parts not currently assigned:

- Office Supplies
 - O-pencils #2 (box of 12)
 - O-Letterhead antique gold vellum (ream)
 - O-Letterhead gray vellum (ream)
 - O-Copy Paper 8.5"x11" white

Parts assigned:

Parts Total Cost: \$0.00

Kits not currently assigned:

Kits assigned:

Figure 81-Inventory Category Expanded

Inventory Selections

Once the Inventory Categories are expanded, select the individual pieces of inventory by either highlighting the item and clicking the single right facing arrow, or clicking and dragging the item from the left box to the right box

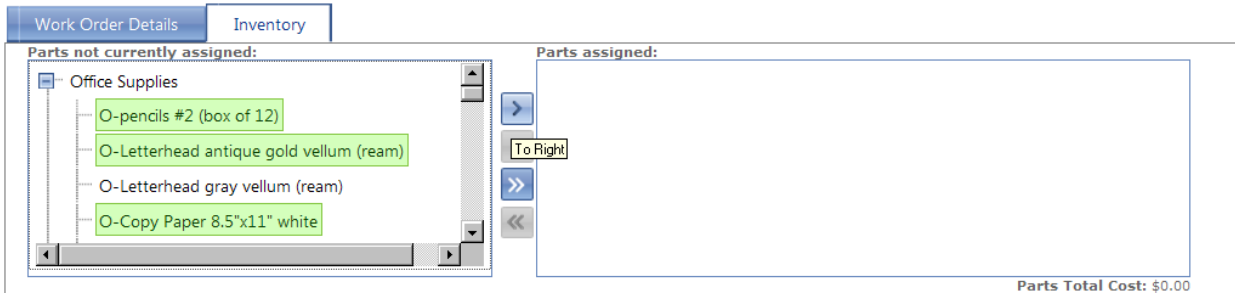


Figure 82-Inventory Selected

Adjusting Quantities

Once the individual items have been added to the right side of the box, the amounts can be adjusted. A number can be typed into the box, or the up and down arrows can be used to adjust the amount.

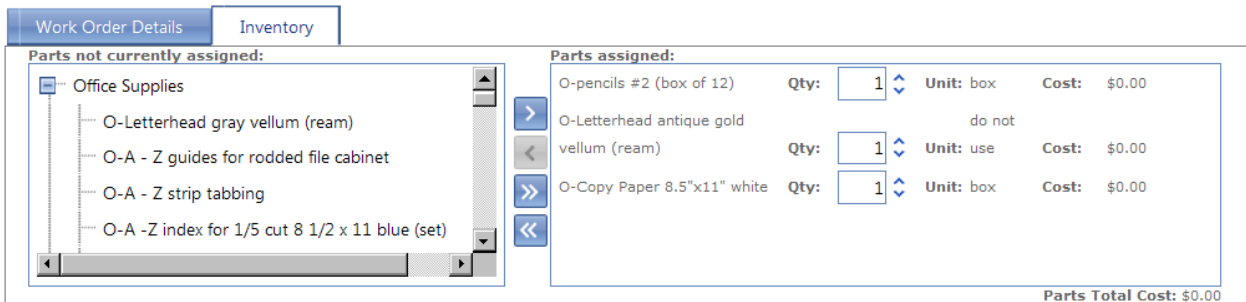


Figure 83-Inventory Added

Work Order Main Details

If the main details tab has not already been filled out, make sure to complete the information as for a normal work order. Click the save button to save your work order and inventory selections.

Reports

Several areas are available for custom reporting in Que Centre. Reports can be created for Work Orders, Equipment, Events, Fixed Assets, and Inventory as well as Summary Reports. Each report has slightly different options but all are created and function in the same basic manner. Work Order reports are shown in the examples below.

List Reports

Clicking on any of the Report types under the Reports tab will open a list of reports for that particular type.

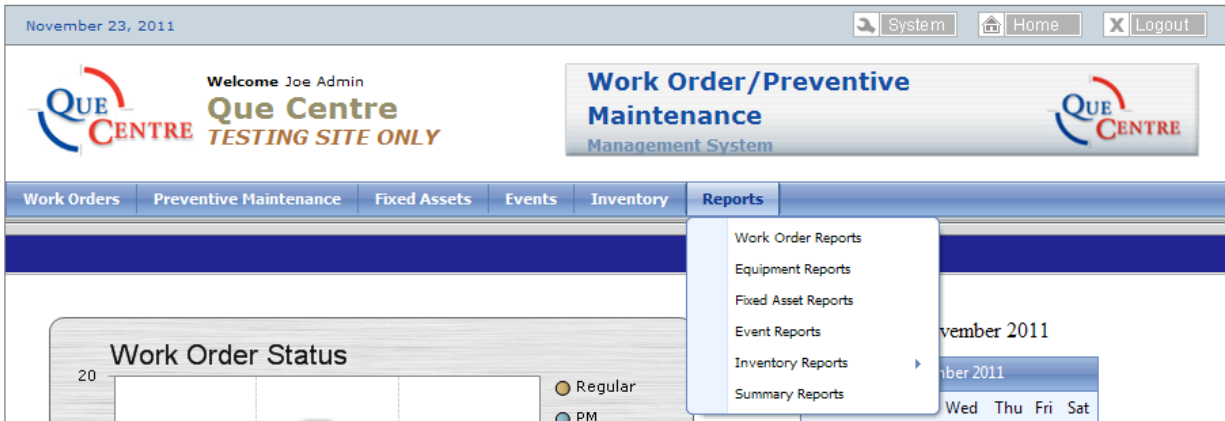


Figure 84 Reports – List Reports

Create New Report

Click on Create New Report

Create Work Order Report

Report Name:

Description:

Words: 0 Characters: 0

Work Order Filters | **Additional Details**

Work Order Numbers:

Description:

Created: After Before

Date Worked:

Completed:

Type:

Equipment:

Parts:

Service Area:

Campus:

Building:

Floor:

Room:

Requested By:

Assigned To:

Assigned By:

Worked On By:

Statuses Not Included:

Statuses Included:

Hint: To move an item, drag to the other window or highlight it and click arrow. (Ctrl + Left-Click to select multiple)
Note: An empty "Statuses Included" box will include all Work Order-Statuses in result.

Preview | Export | Print | Save | Cancel | Clear Filters

Figure 85 Reports - Create New Work Order Report

- Name the report and add a description if needed.
- Fill out the form according to what you want to report on. The Work Orders Filter tab has information that is in non custom fields. The Additional details tab has information obtained from custom fields.
- The lower half of the window has preview, export, print and save options as well as a clear filter button to remove all filters previously selected.

Preview | Export | Print | Save | Cancel | Clear Filters

Number	Type	Status	Description	Location
No work orders exist.				

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Figure 86 Reports Options

Report Column Headings

Column headings can be changed by right clicking a column heading and selecting Columns. A list of available columns is displayed. Choose the columns you want in your report by selecting the check boxes. There are also sorting options available for each column as well.

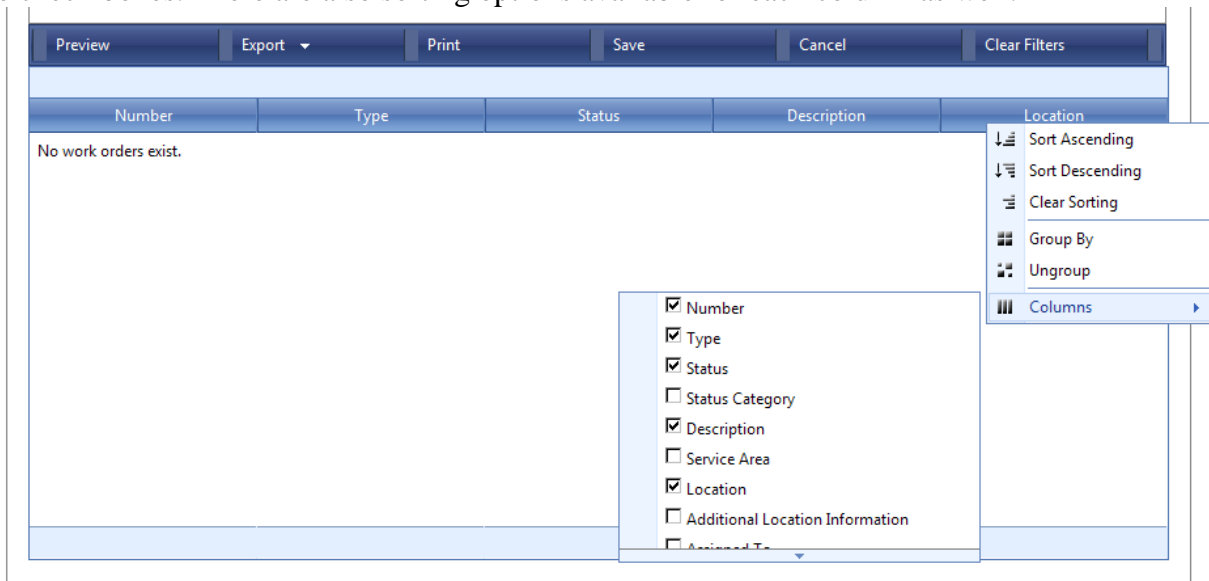


Figure 87 Reports - Column Headings

Report hints

- A report can only return information that is in Que Centre. In other words, if you are filtering on a custom field but data has not been entered into that field, no results will be returned.
- When filtering on a text field, the text must be exact. If you create a filter for Smith, Sue but the data was entered as Sue Smith, no results will be returned. Because text fields are NOT case sensitive a filter of smith, sue would return records for Smith, Sue.
- If you are not getting the results you think you should, try starting out with fewer filters. Once you get some results, begin adding more filters to your report. This may help you narrow down the results, and pinpoint a reason that the results are not as expected.
- When changing filters, it is helpful to clear all filters before adding or removing criteria from the report.
- Reports can be exported to Excel or Word formats and manipulated further in those programs
- Reports can be printed from Que Centre in pdf format.