web based solutions

# Que Centre 2.0 Administrator's Manual

Rev 4/19/2013

# Table of Contents

# 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

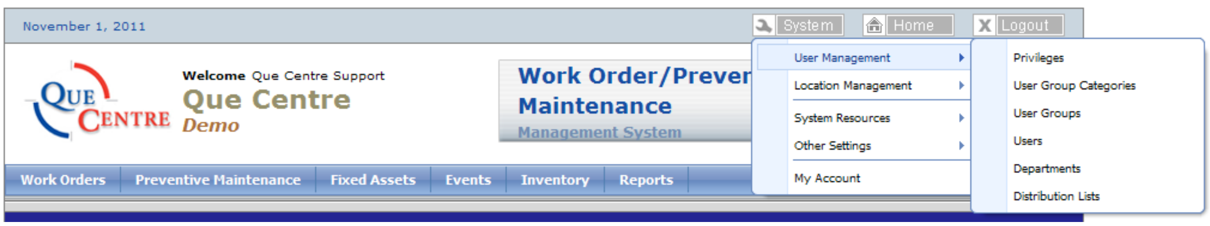



Figure 1 System Management

The list of User Groups is displayed

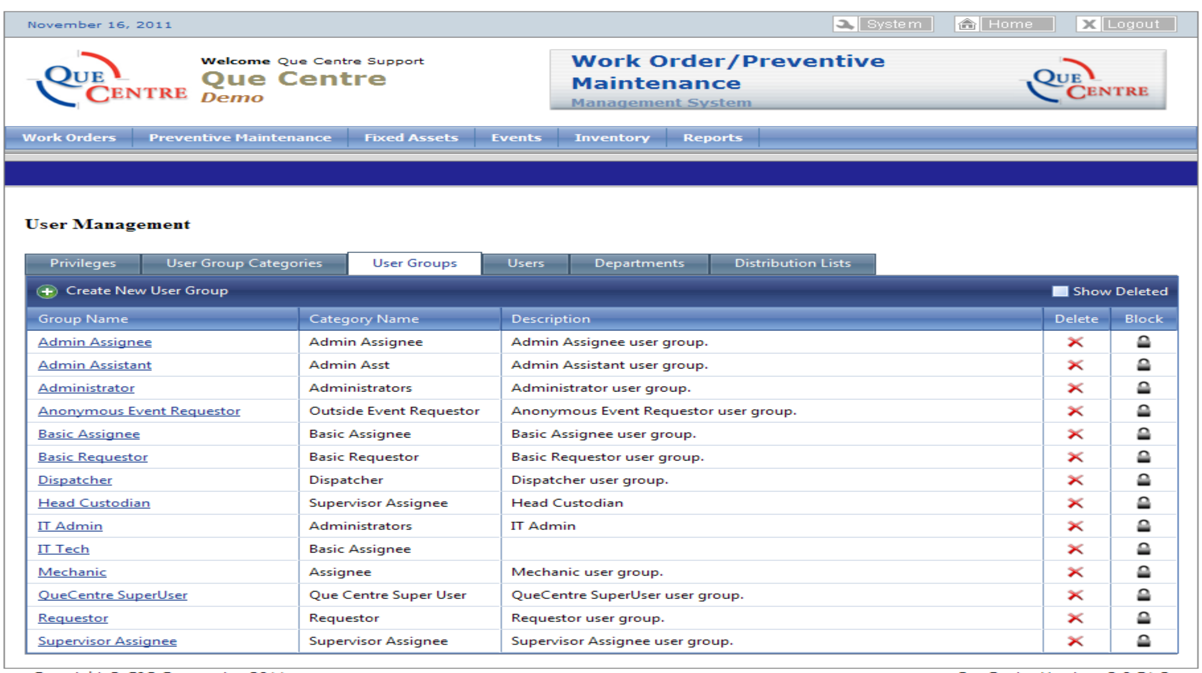



Figure 2 System Management - User Groups

Click on Create New User Group

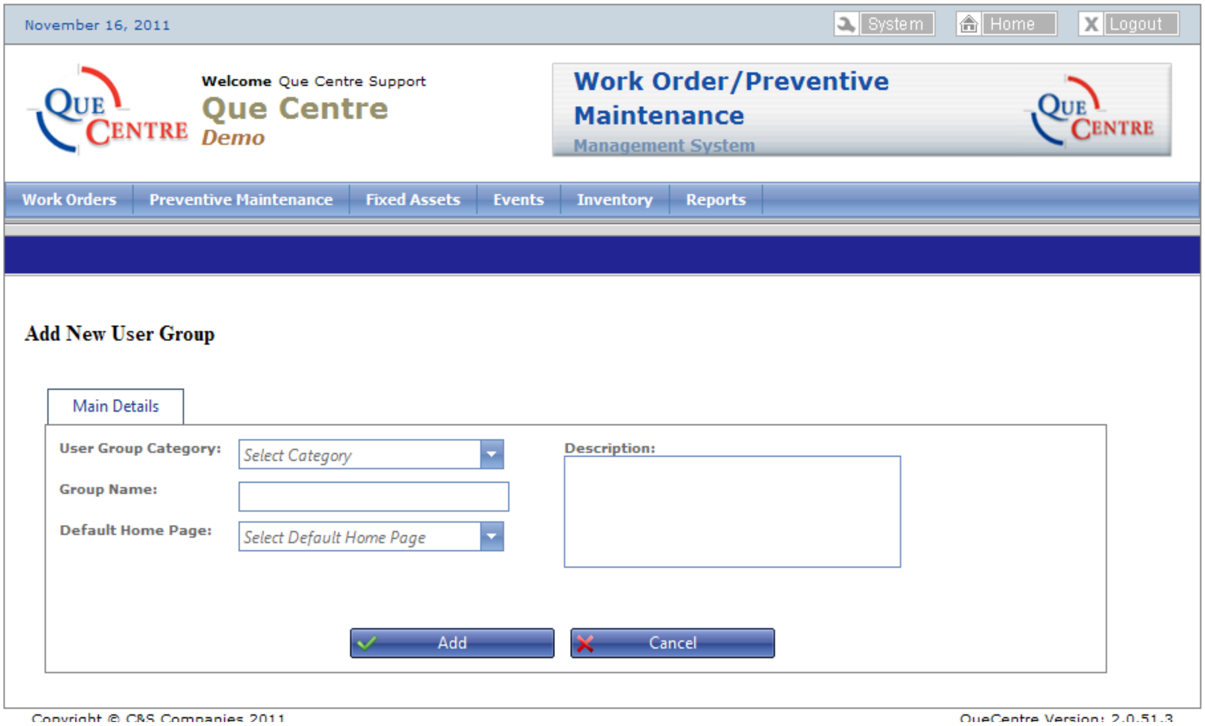



Figure 3 System Management-Create New User Group

- 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.

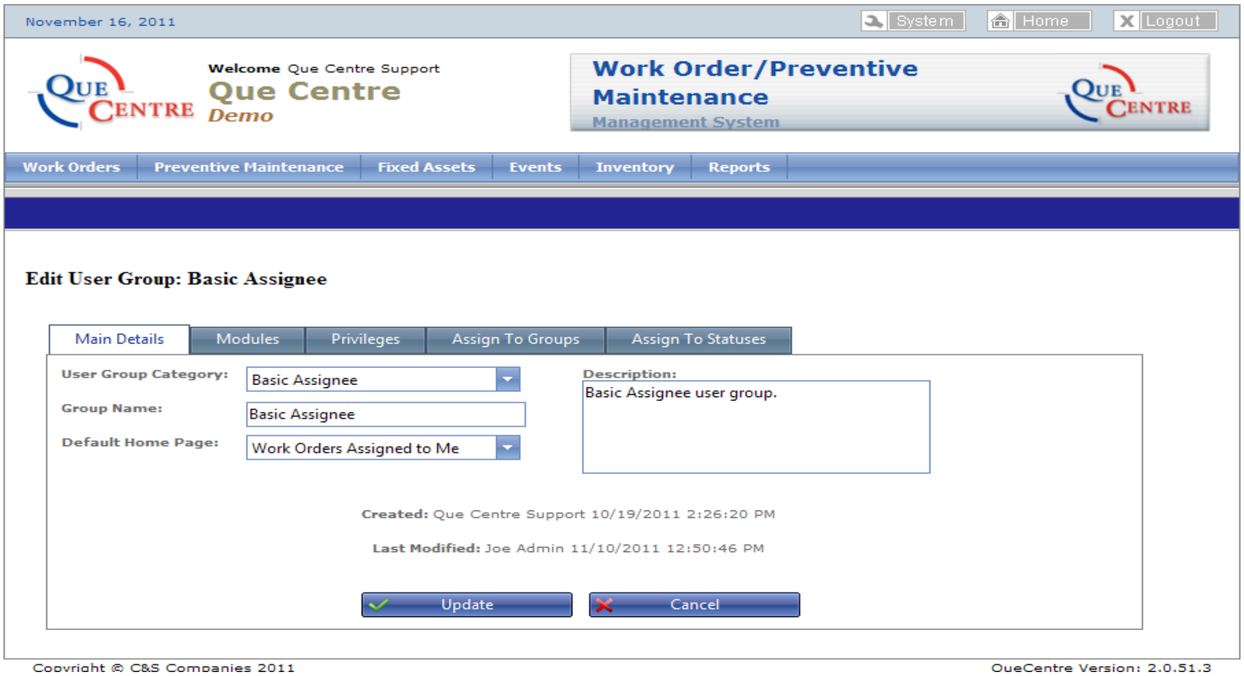



Figure 4 System Management - Edit User Group

### *Modules*

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

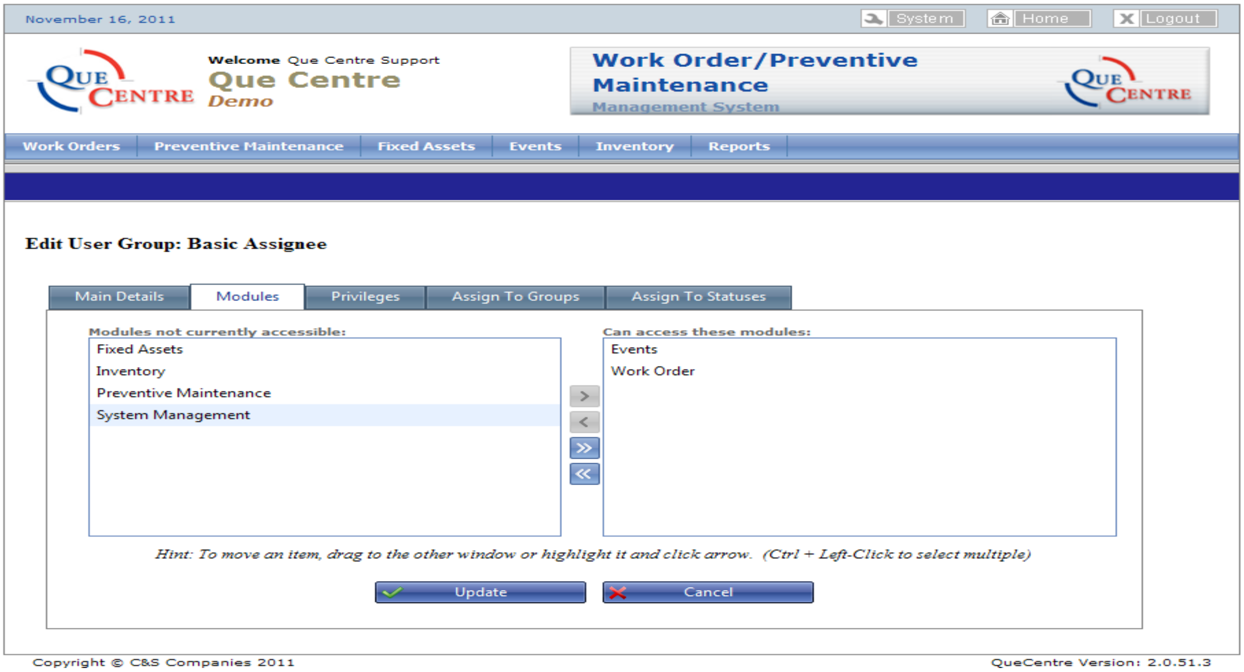



**Figure 5 System Management - User Group Modules**

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*

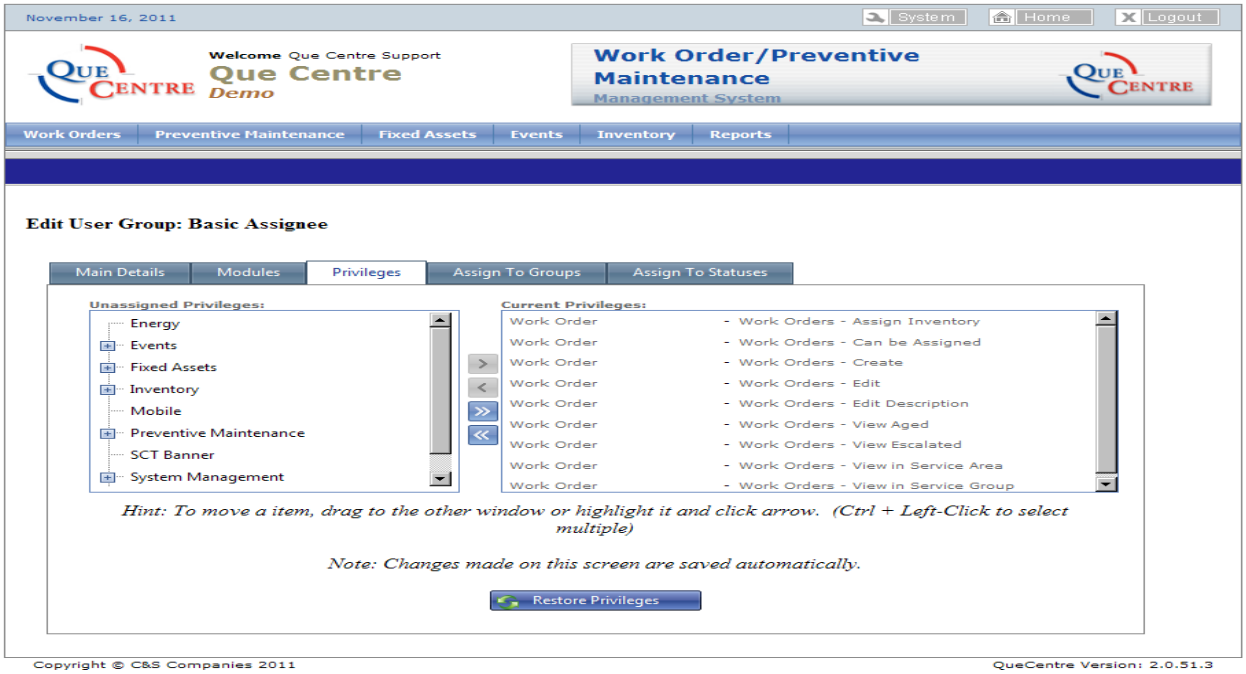



**Figure 6 System Management - User Group Privileges**

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 form 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.*

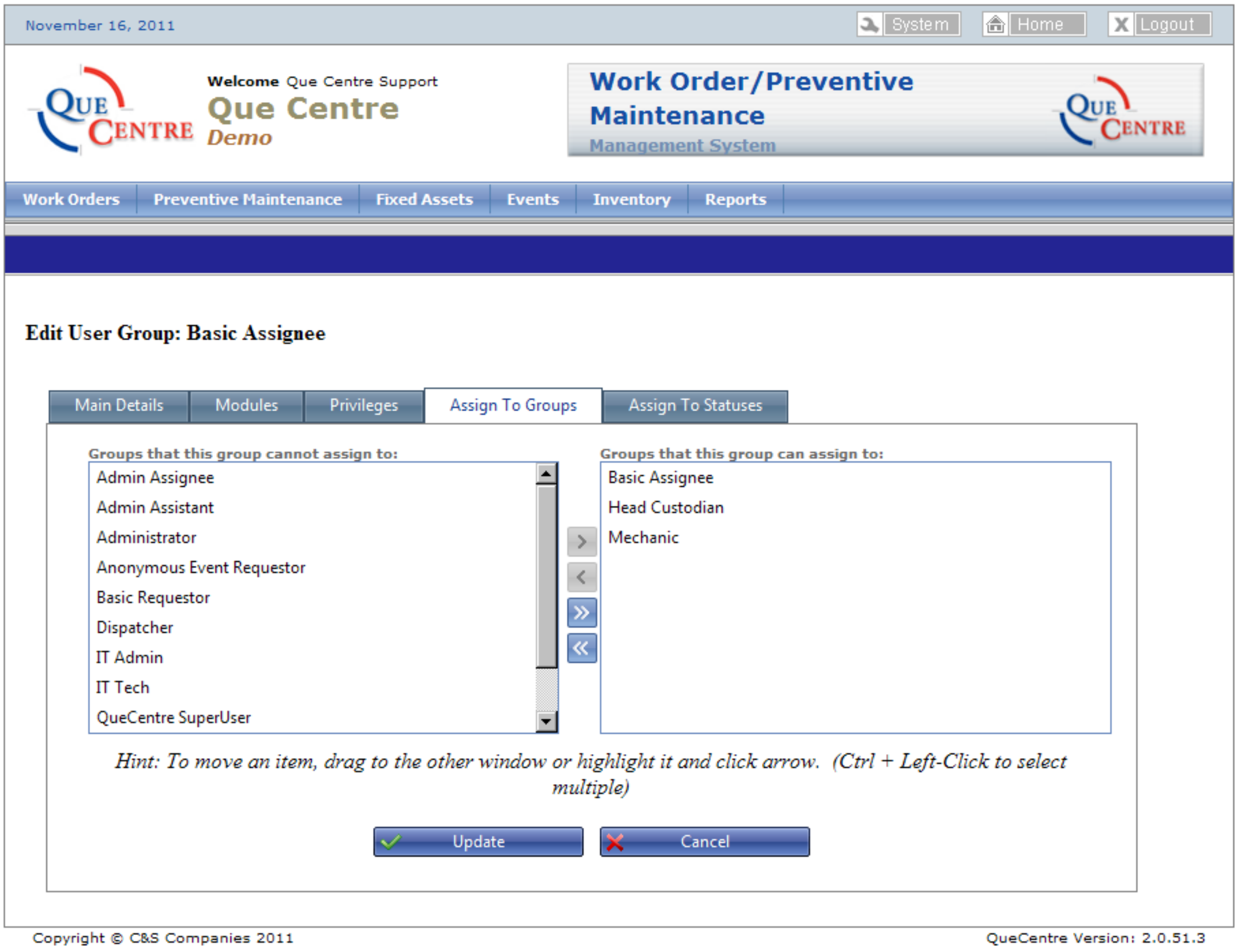



**Figure 7 System Management - User Groups Assign to Groups**

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 form 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.

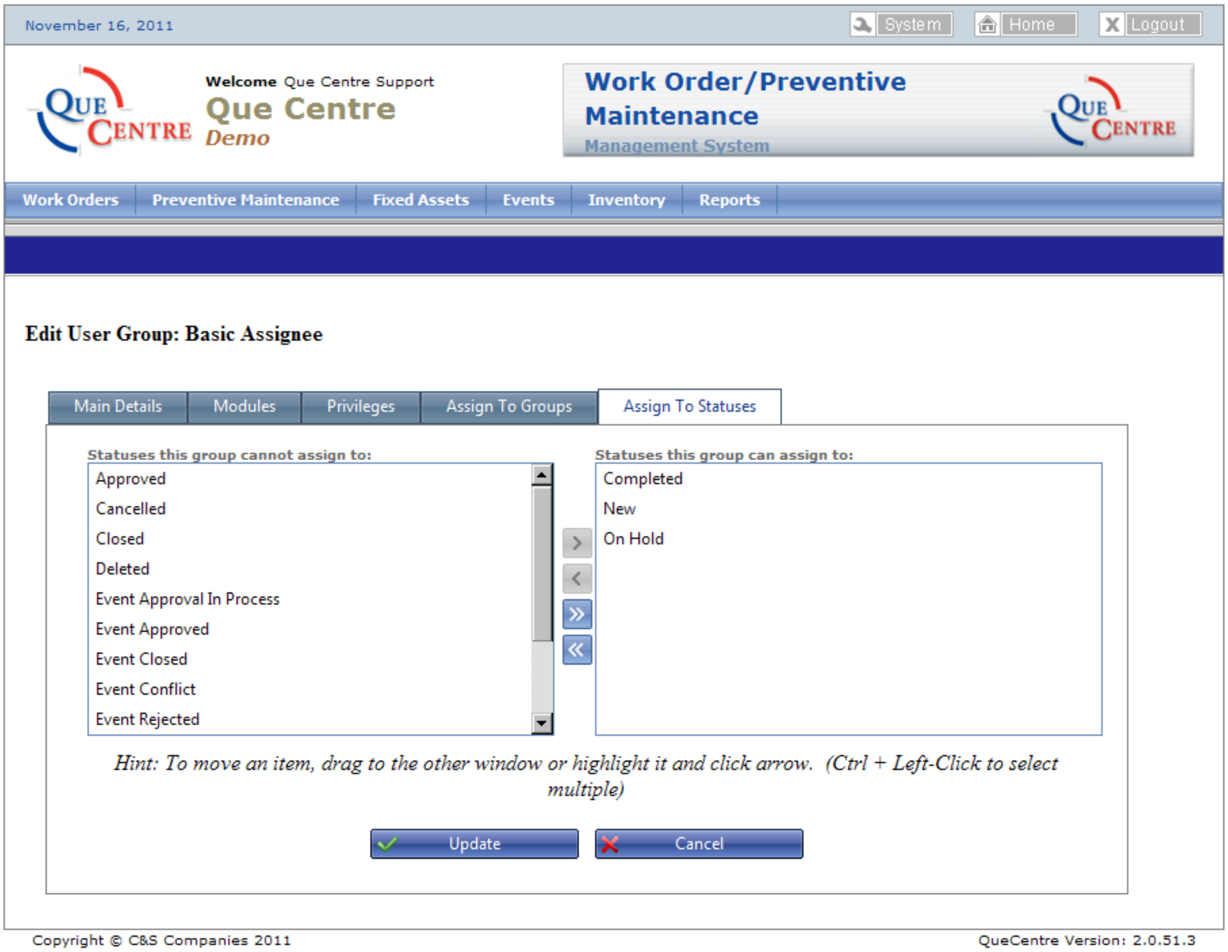



**Figure 8 System Management - User Groups Assign to Statuses**

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

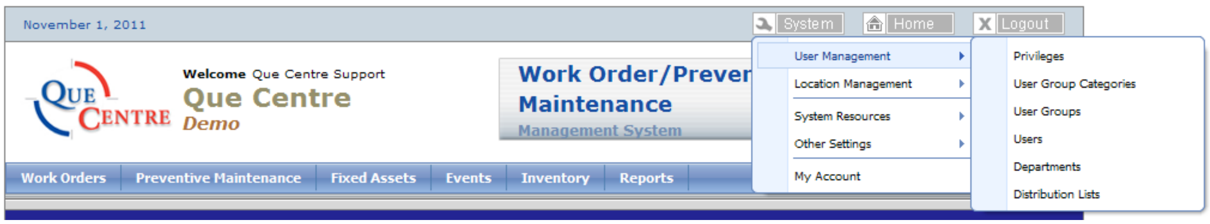



Figure 9 System Management

The list of Users is displayed

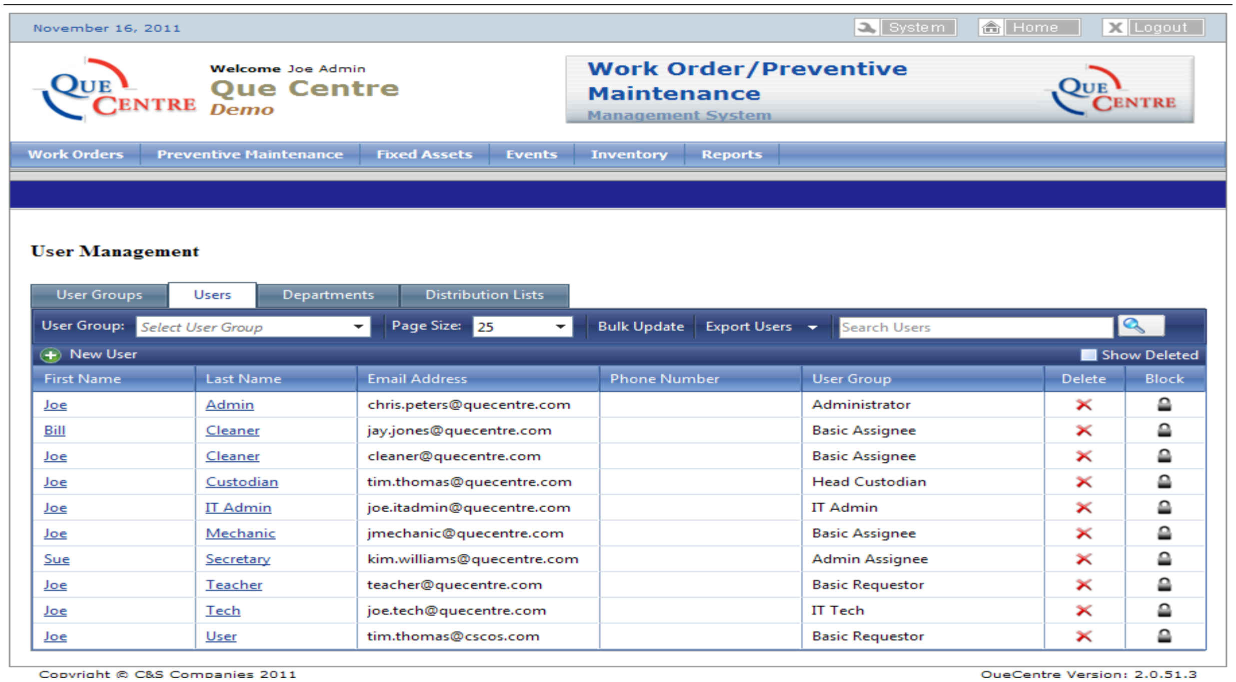
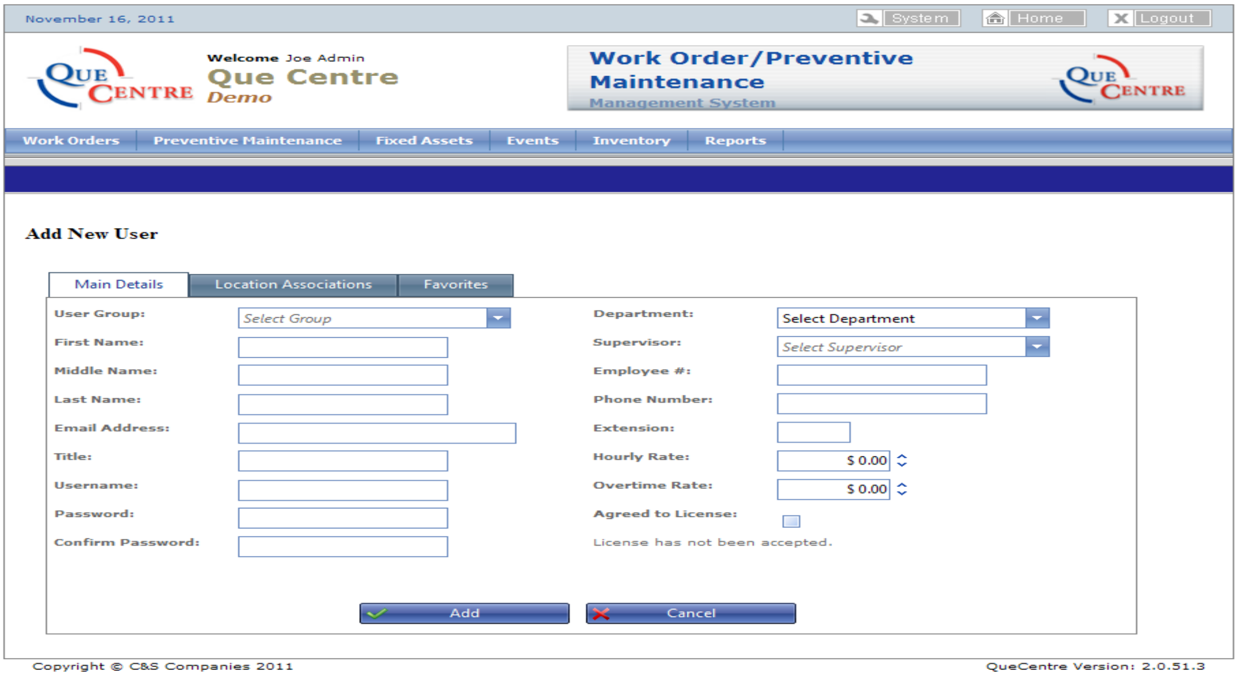



Figure 10 System Management - Users

Click on New User

## *Main Details*




# 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

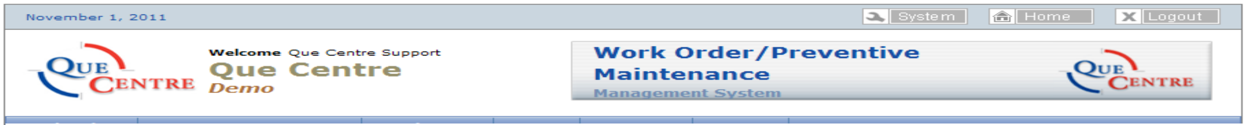
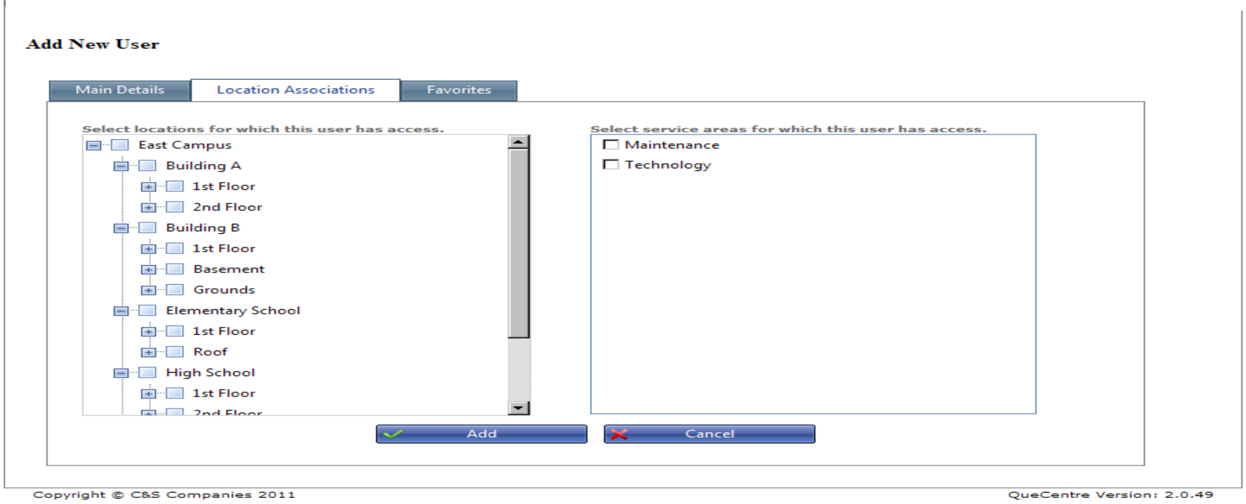



Figure 11 System Management - User Locations




## *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.

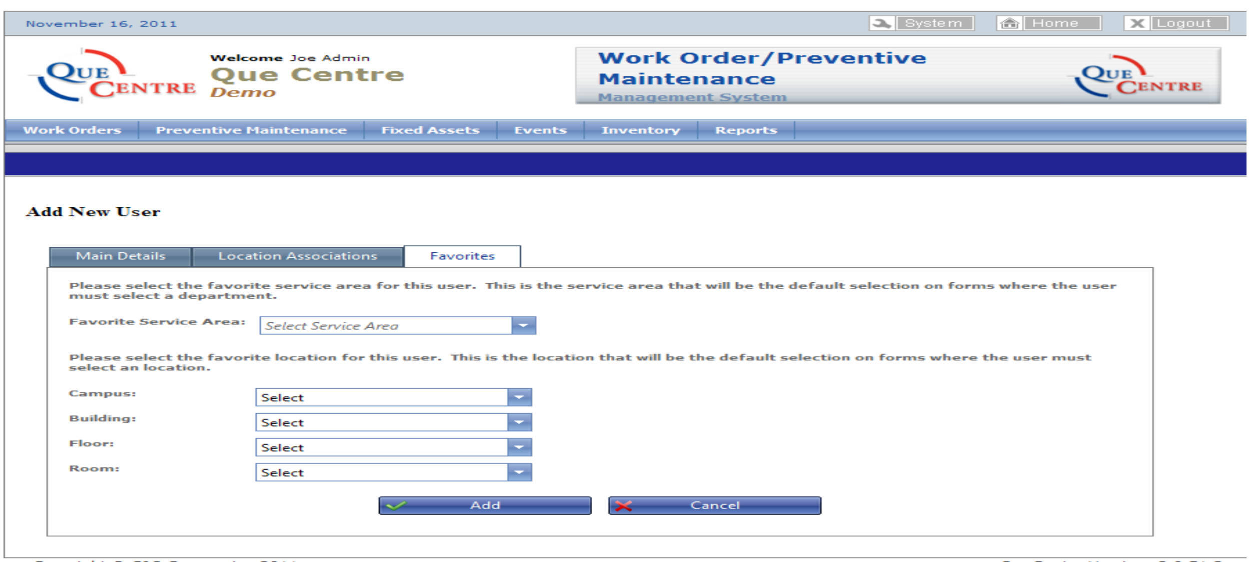
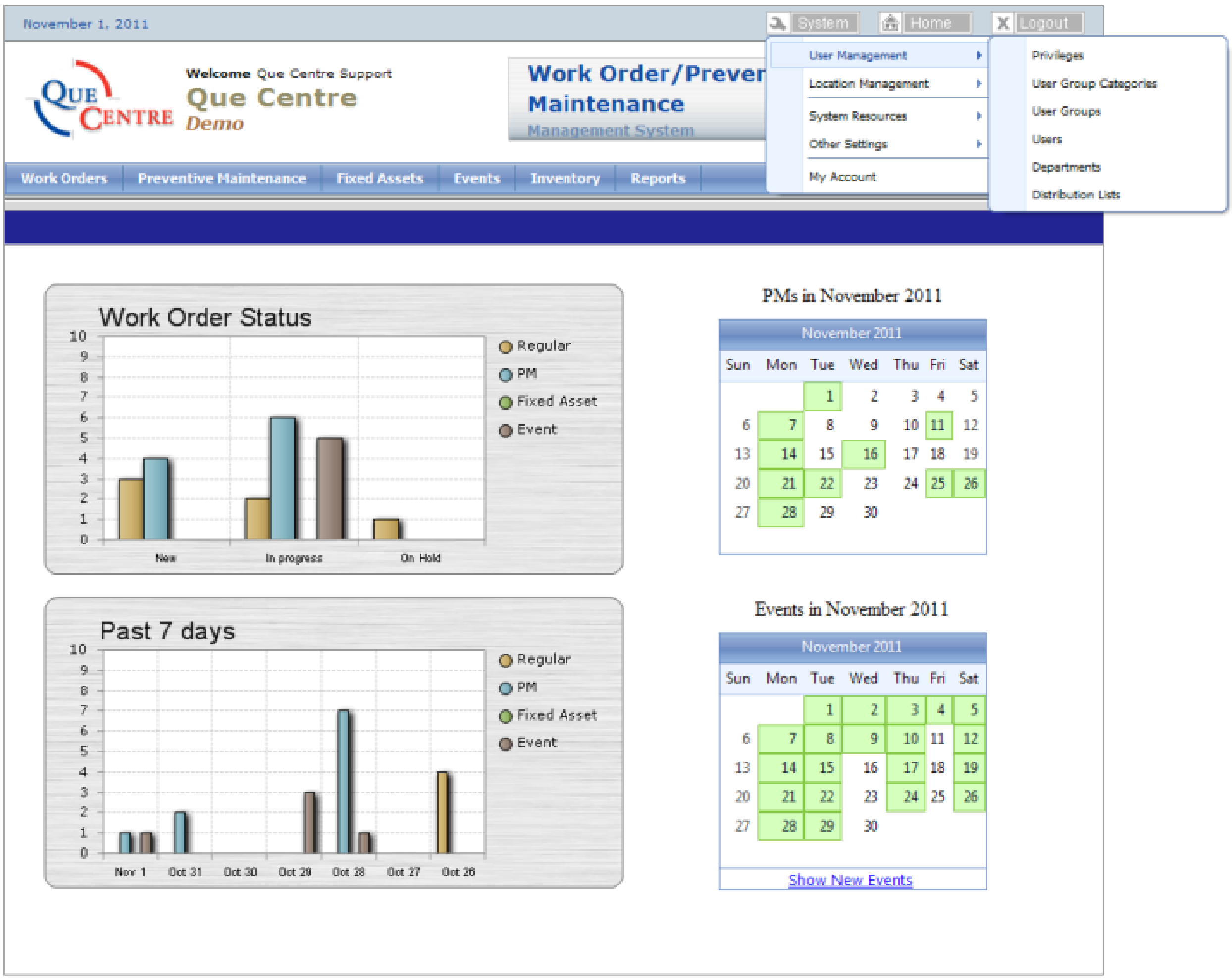



Figure 12 System Management - User Favorites

## 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


Figure 13 System Management - Distribution Lists

Click on New List

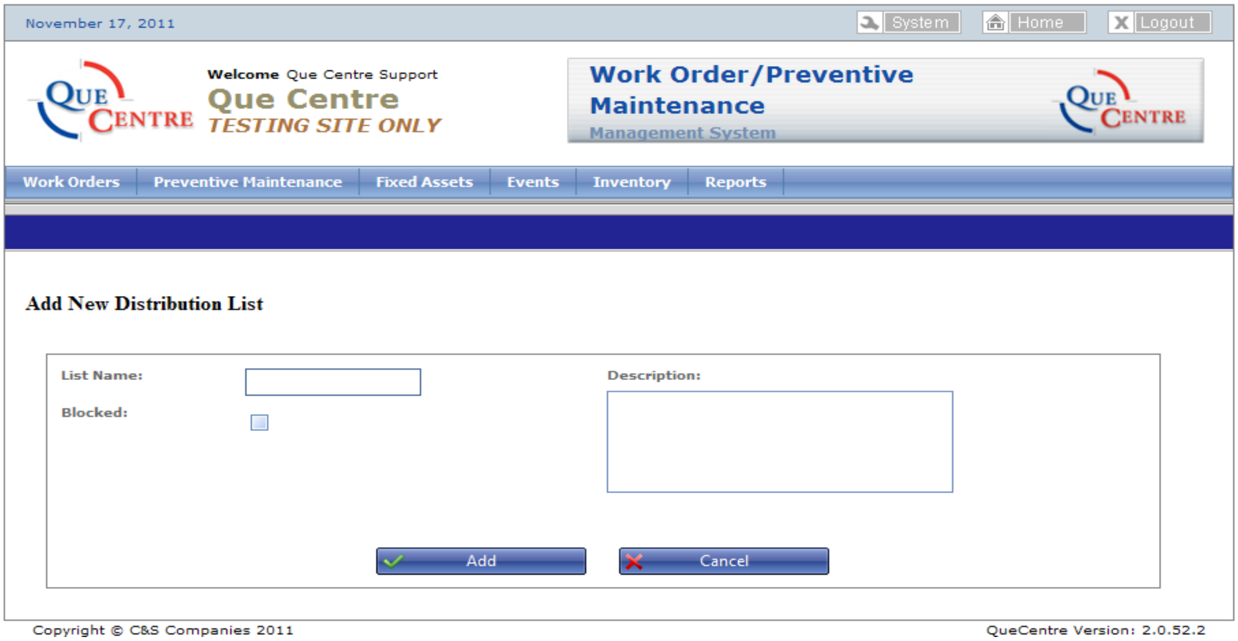



Figure 14 Create New Distribution List

- 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

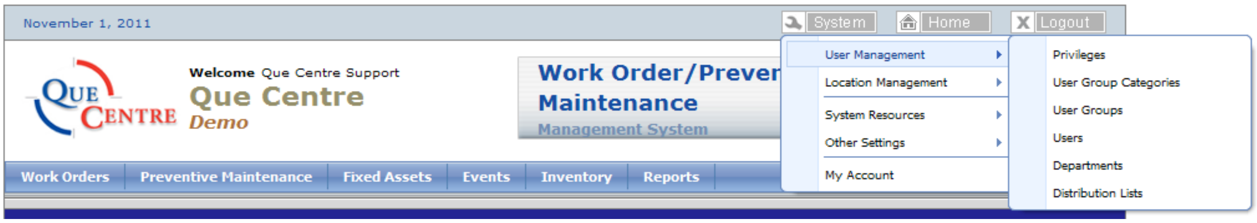



**Figure 15 Location Management**

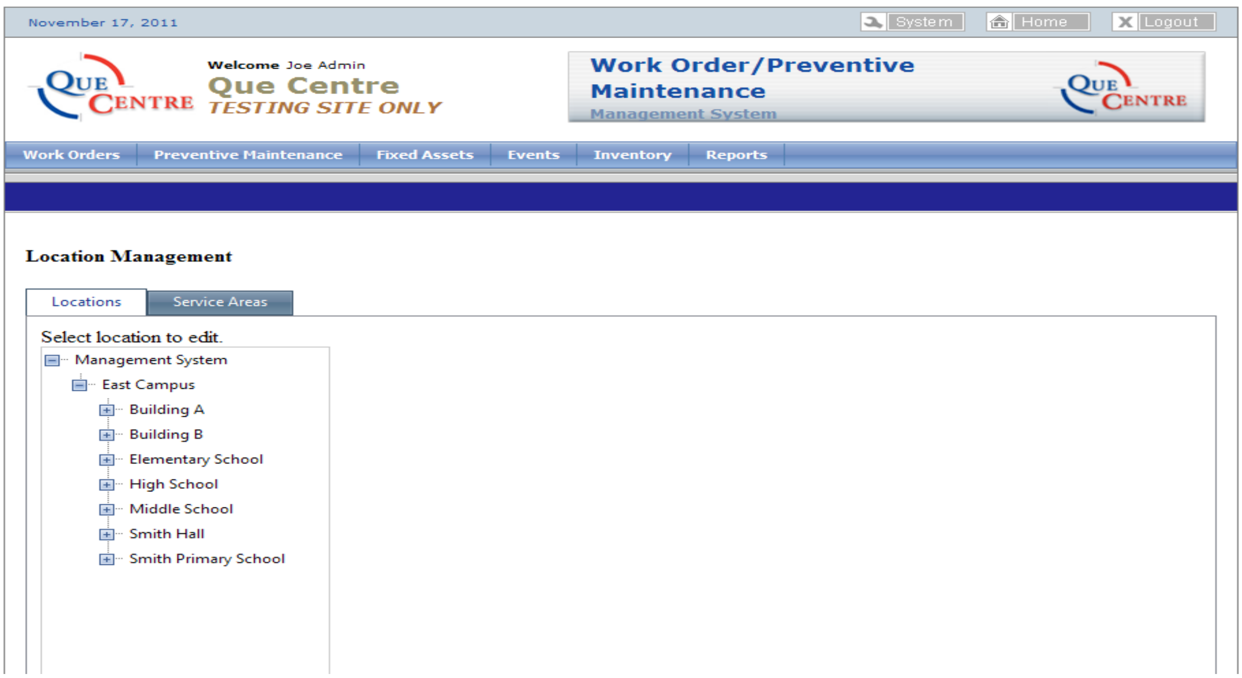



**Figure 16 Location management Add Location**

### *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

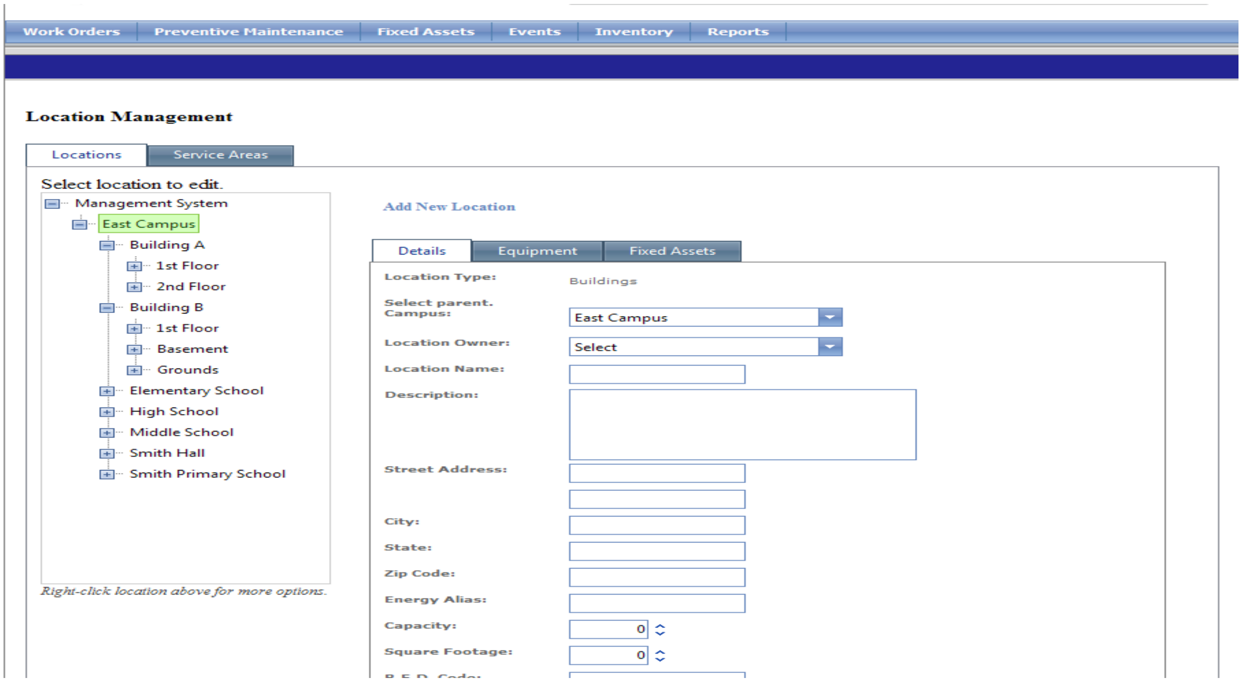



Figure 17 Location Management - Add Location

## 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.

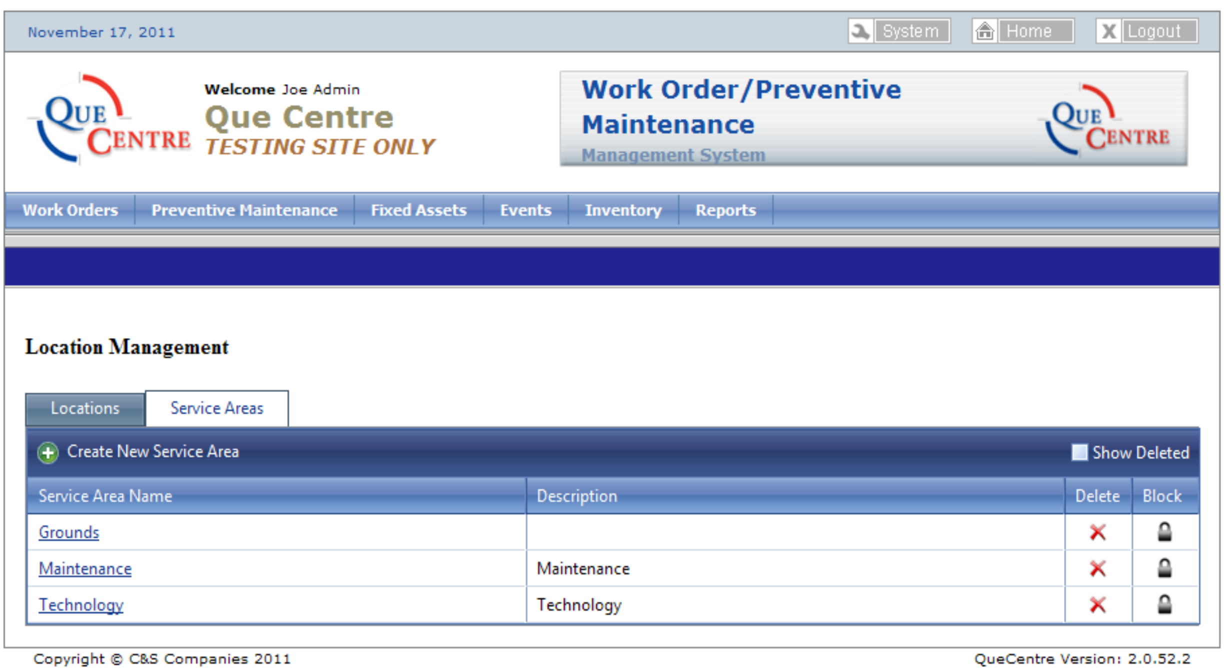



Figure 18 Management - Service Areas

### *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

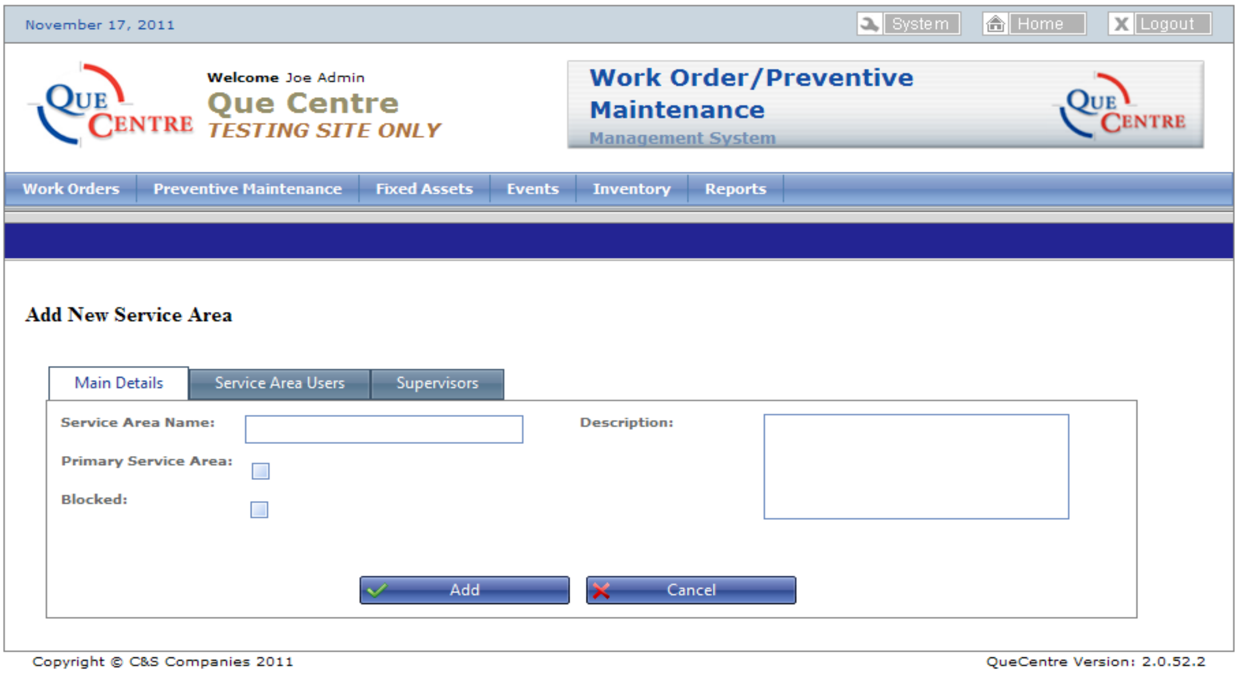



Figure 19 Location Management - Add new Service Area

# 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.


**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.

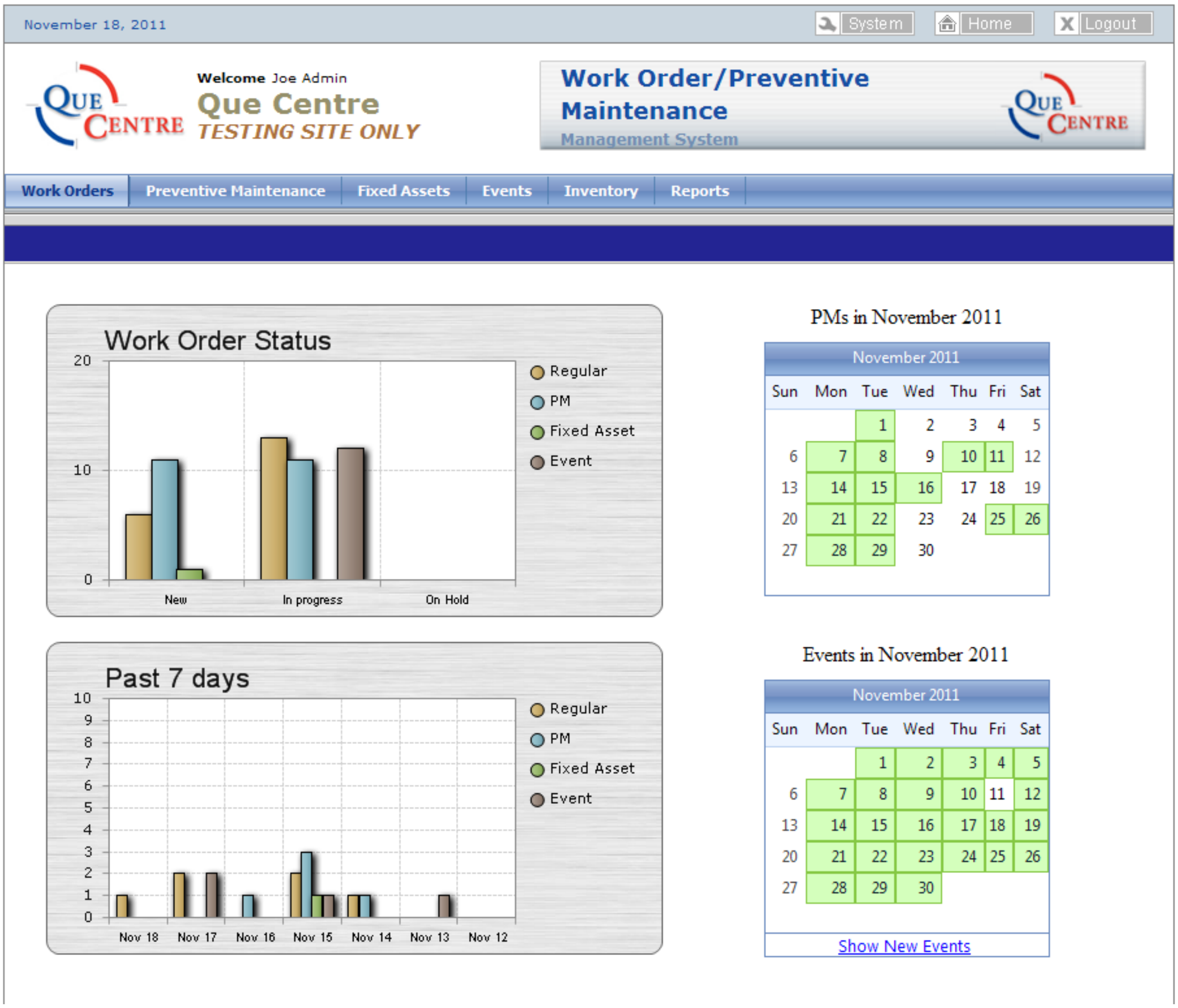



**Figure 21 Dashboard**

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)

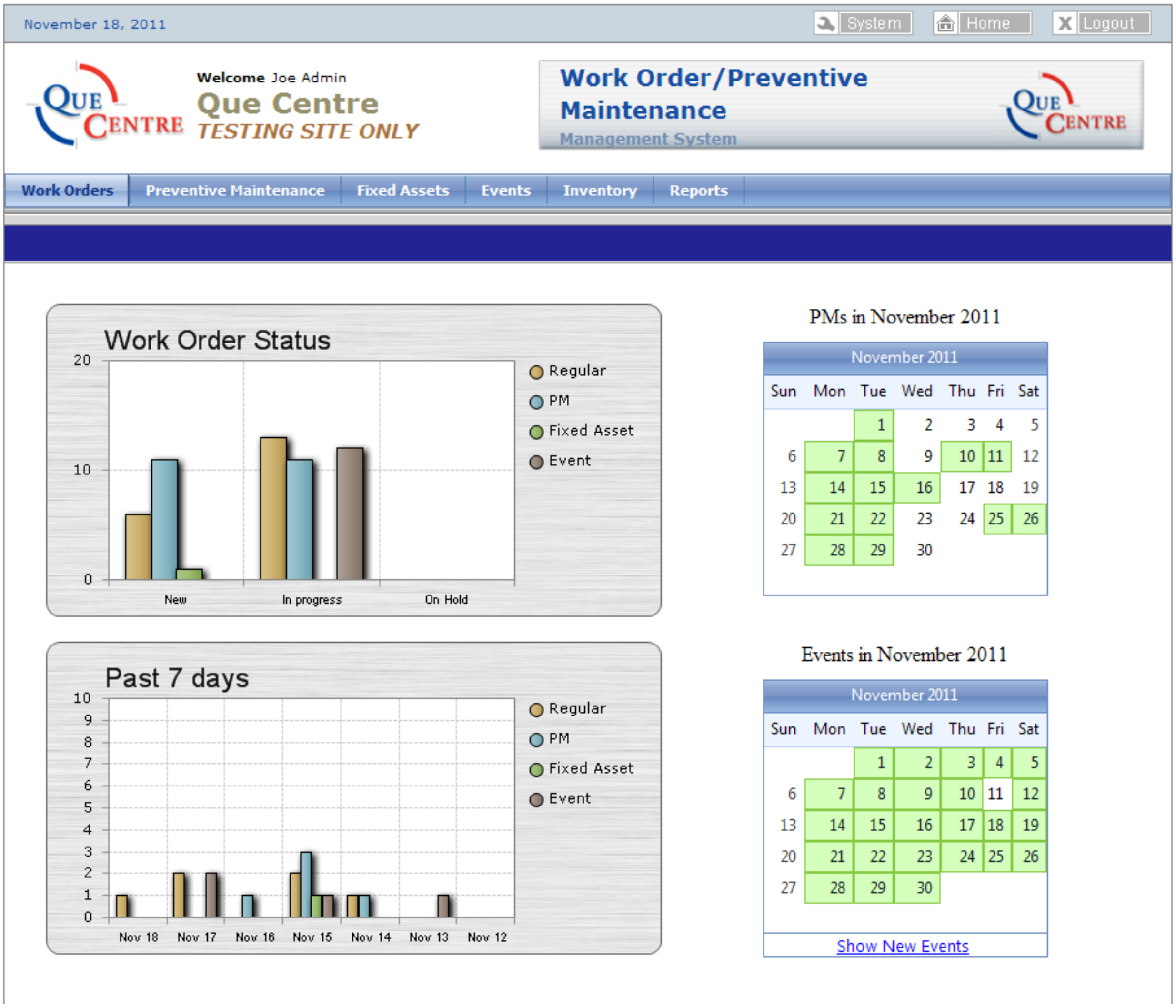



**Figure 22 Dashboard**

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

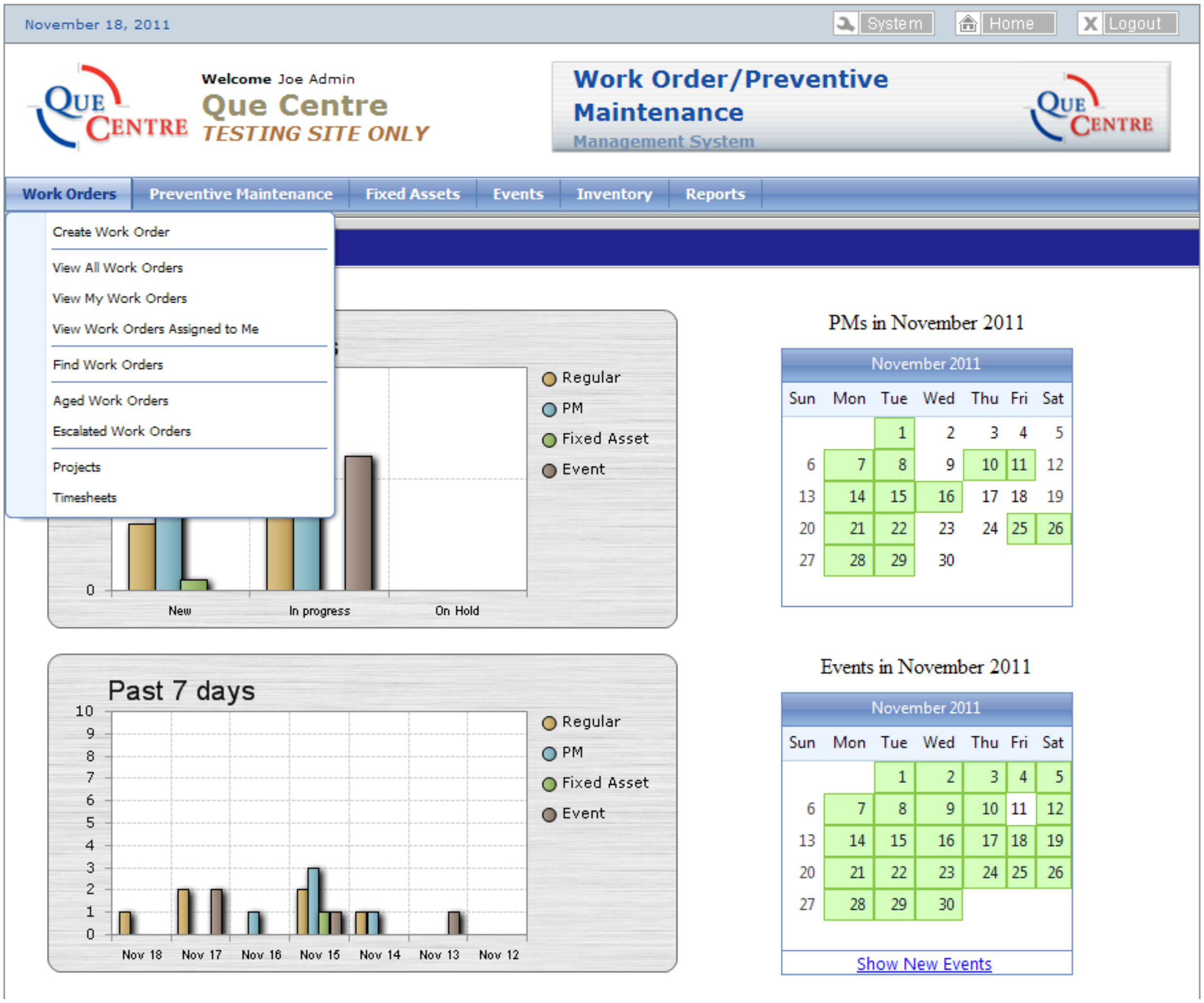



Figure 23 Dashboard - Work Orders

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.

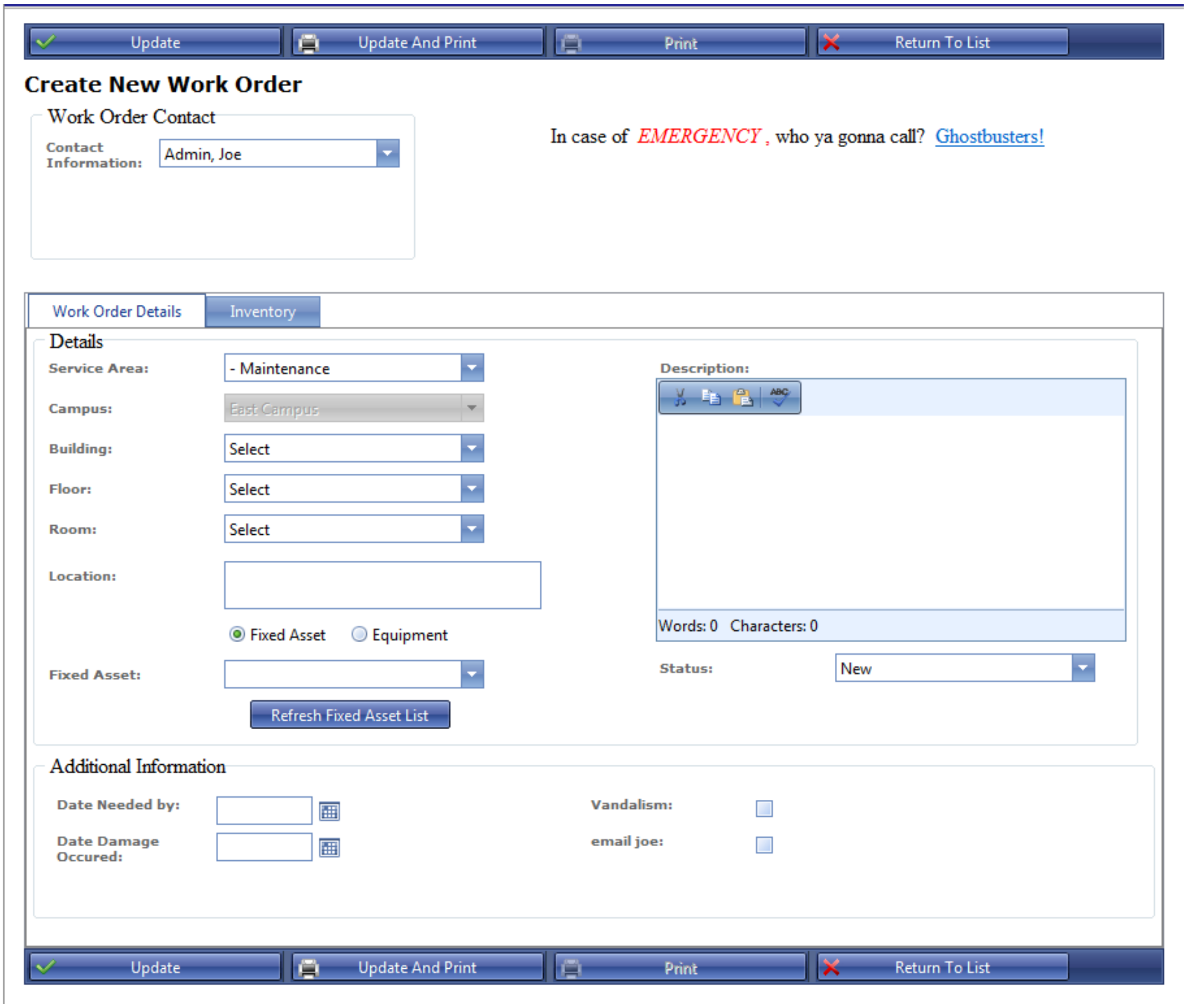



**Figure 24 Create New Work Order**

### *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.


| 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 in the same Service Area to user 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*

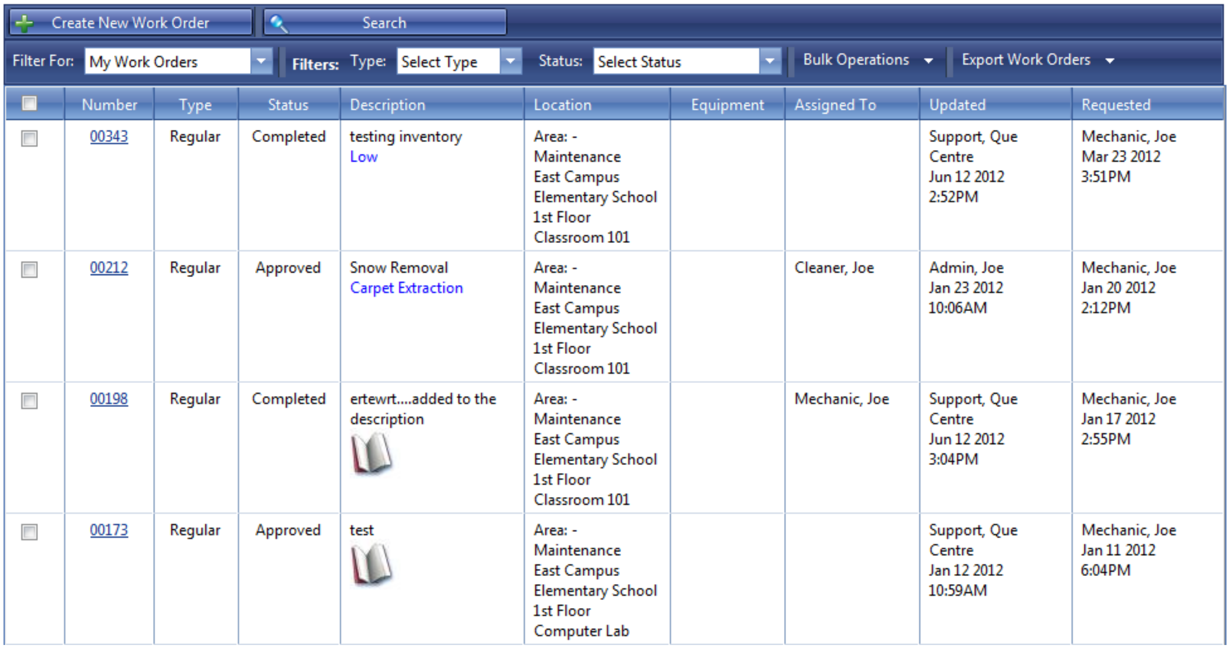
Multiple Work Orders may be selected and printed. Click the checkbox next to the Work Orders that you want to print and then click Bulk Print under the Bulk Operation tab.

### *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

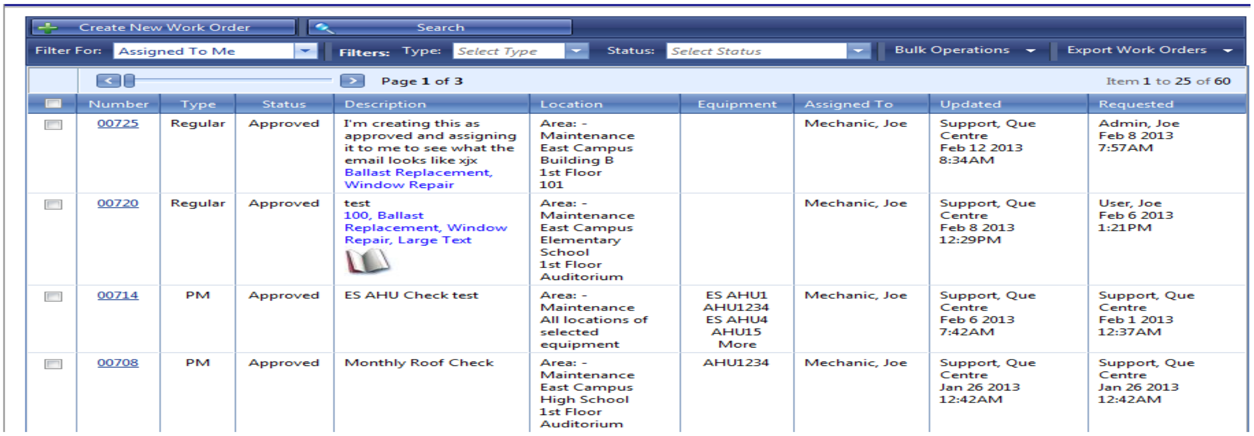
Filter For: My Work Orders | Filters: Type: Select Type | Status: Select Status | Bulk Operations | Export Work Orders

| | Number | Type | Status | Description | Location | Equipment | Assigned To | Updated | Requested |
|---|---|---|---|---|---|---|---|---|---|
| | 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 |
| | 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 |
| | 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 |
| | 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

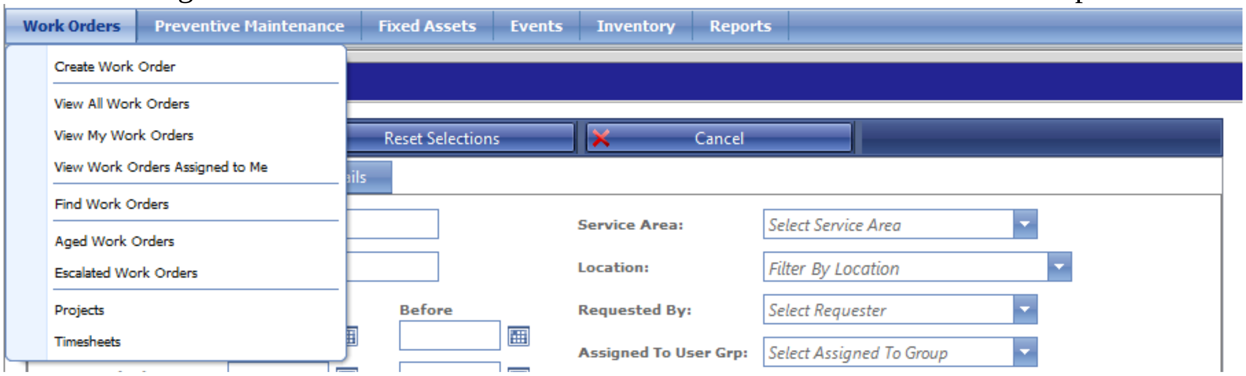
Page 1 of 3 | Item 1 to 25 of 60

| | Number | Type | Status | Description | Location | Equipment | Assigned To | Updated | Requested |
|---|---|---|---|---|---|---|---|---|---|
| | 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 |
| | 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 |
| | 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 |
| | 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

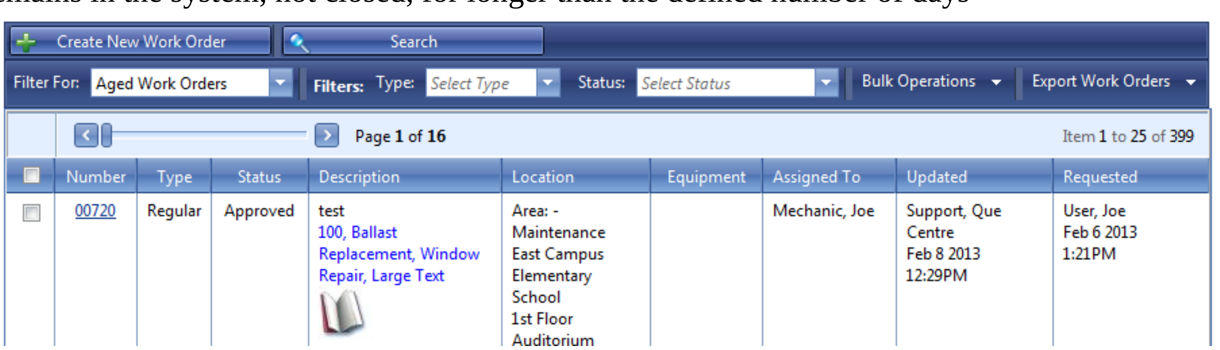



Figure 28 Aged Work Orders

## 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.

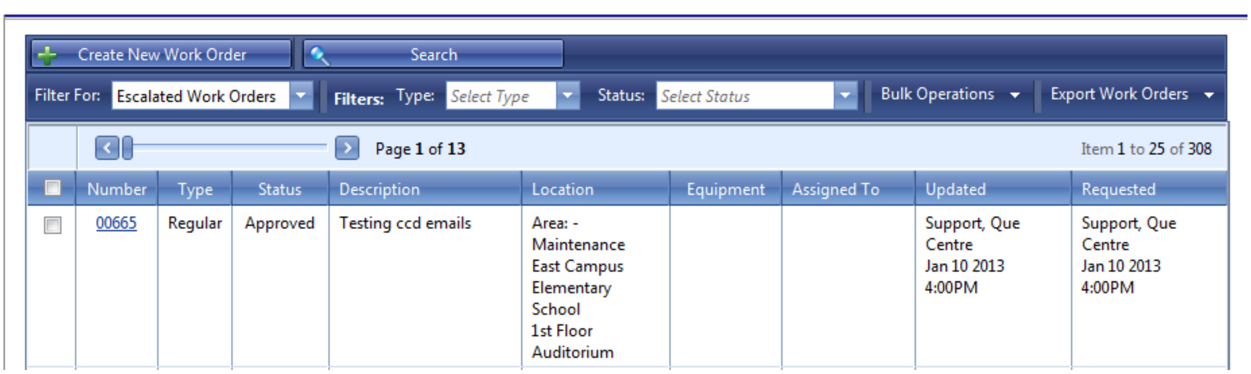



Figure 29 Escalated Work Orders

## 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.

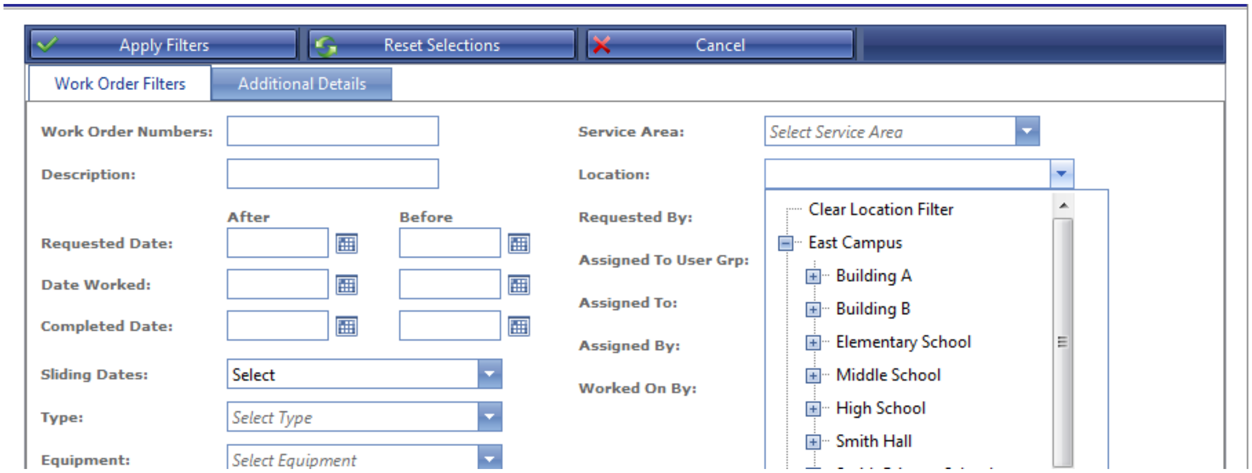
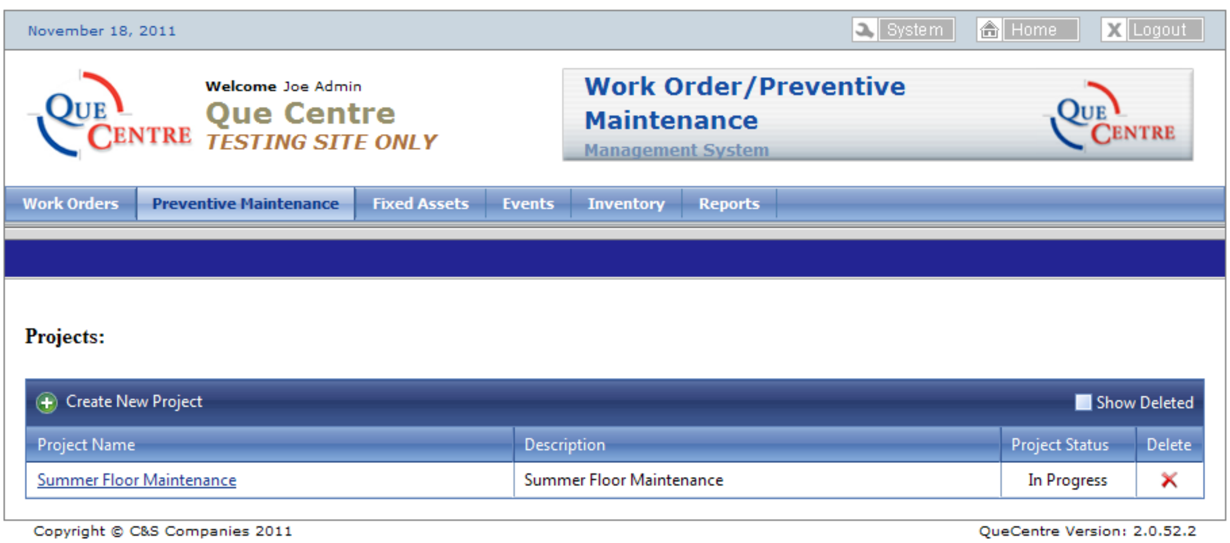



Figure 30 Find Work Order

## Projects

Projects are related Work Orders that are grouped together.



## *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.

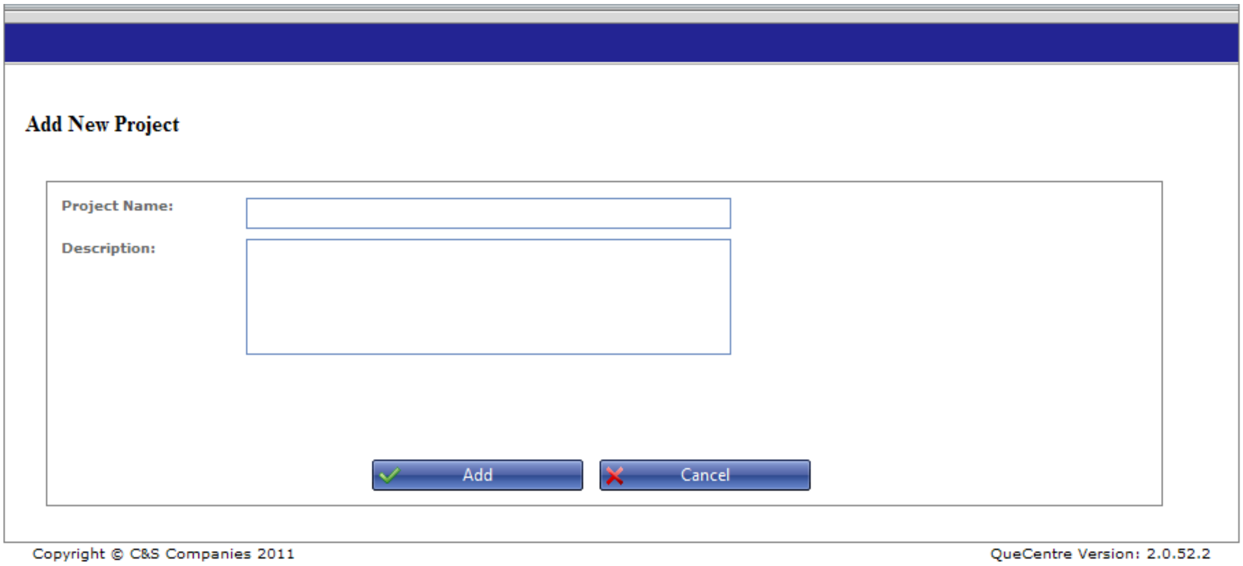



**Figure 31 Add New Project**

## *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

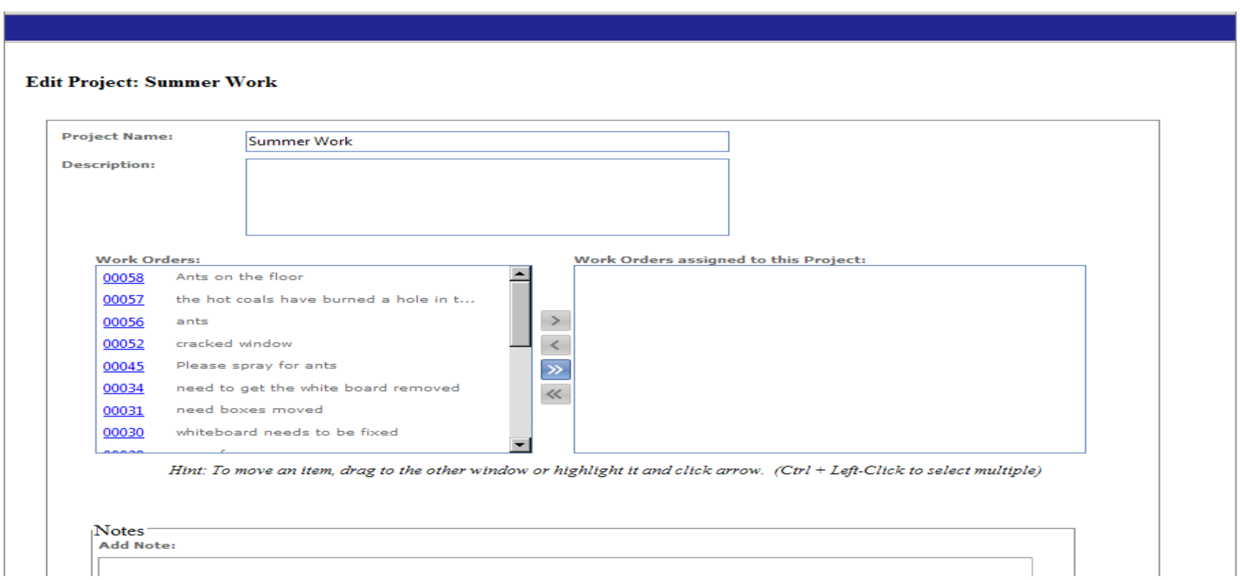



**Figure 32 Edit Project**

## 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.

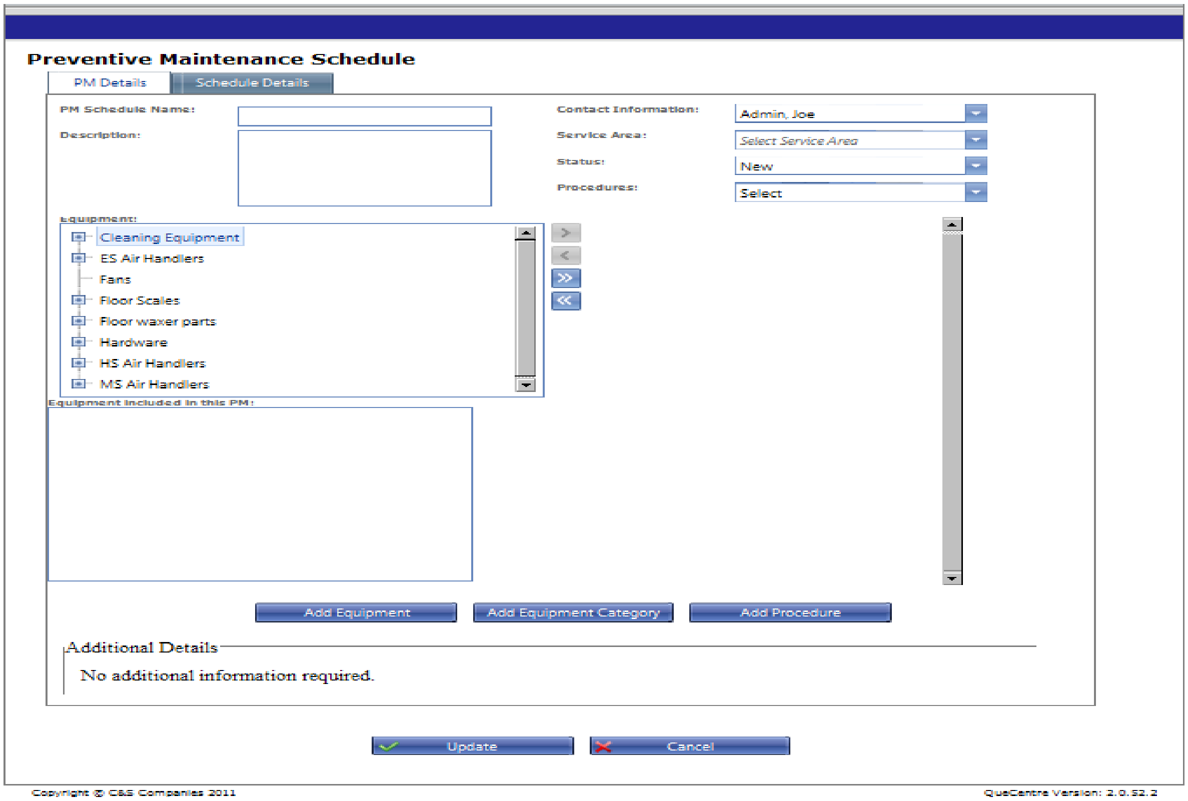



Figure 34 Preventive Maintenance - Create New Schedule

### *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 singe 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.

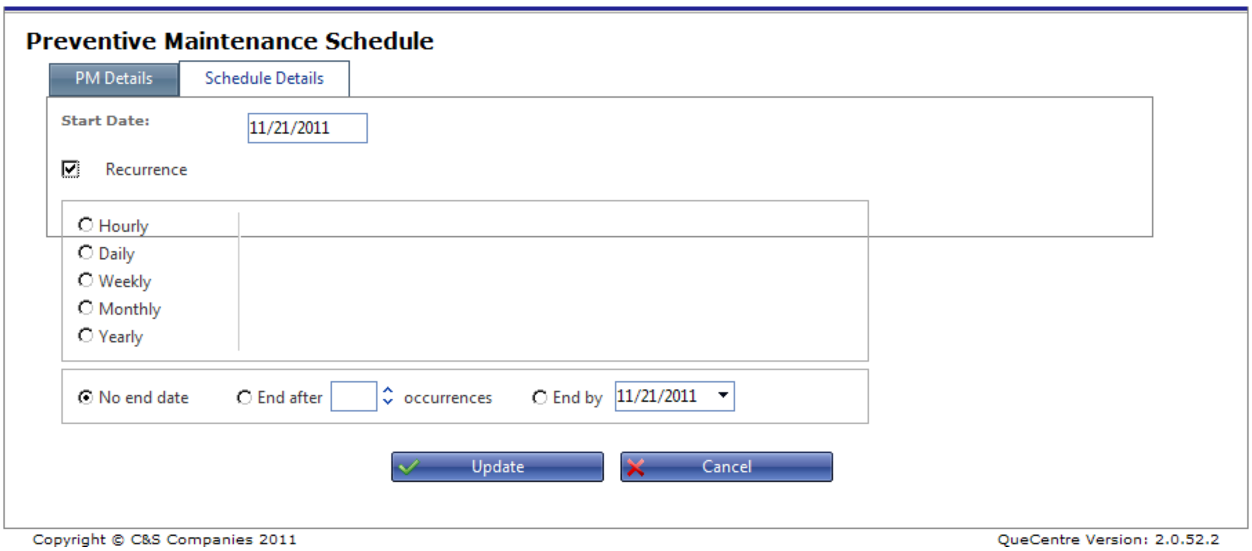
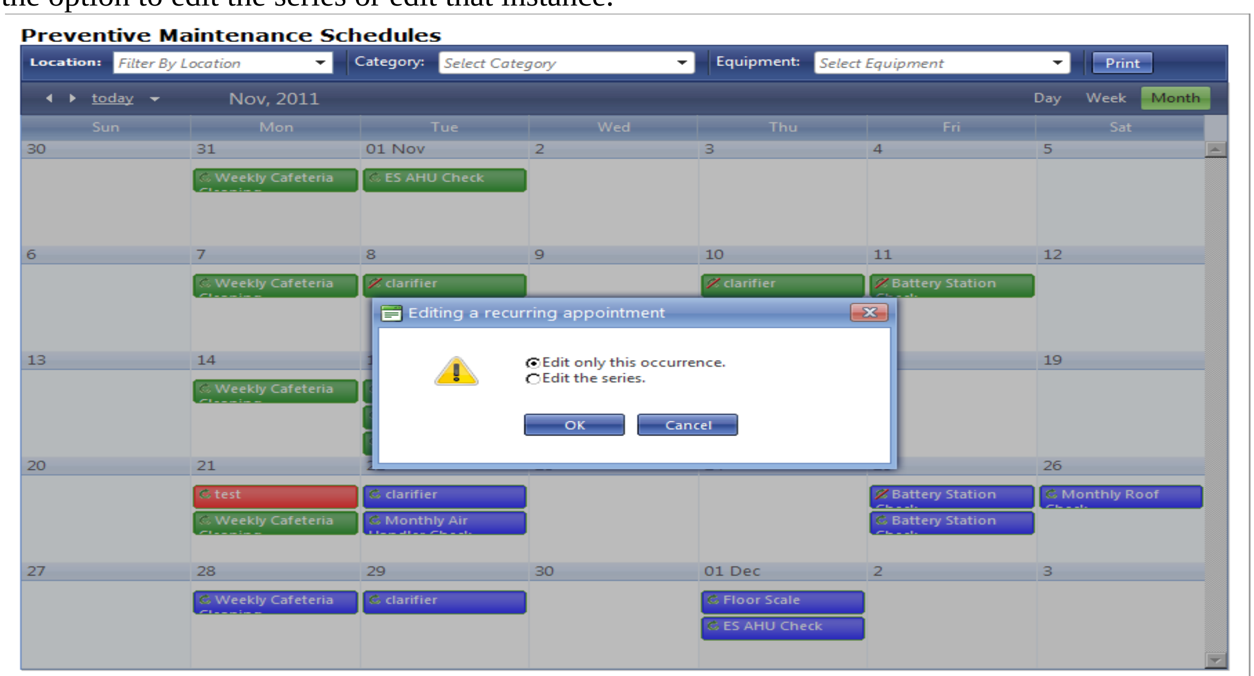



Figure 35 Preventive Maintenance - Recurrence

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.



### *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.

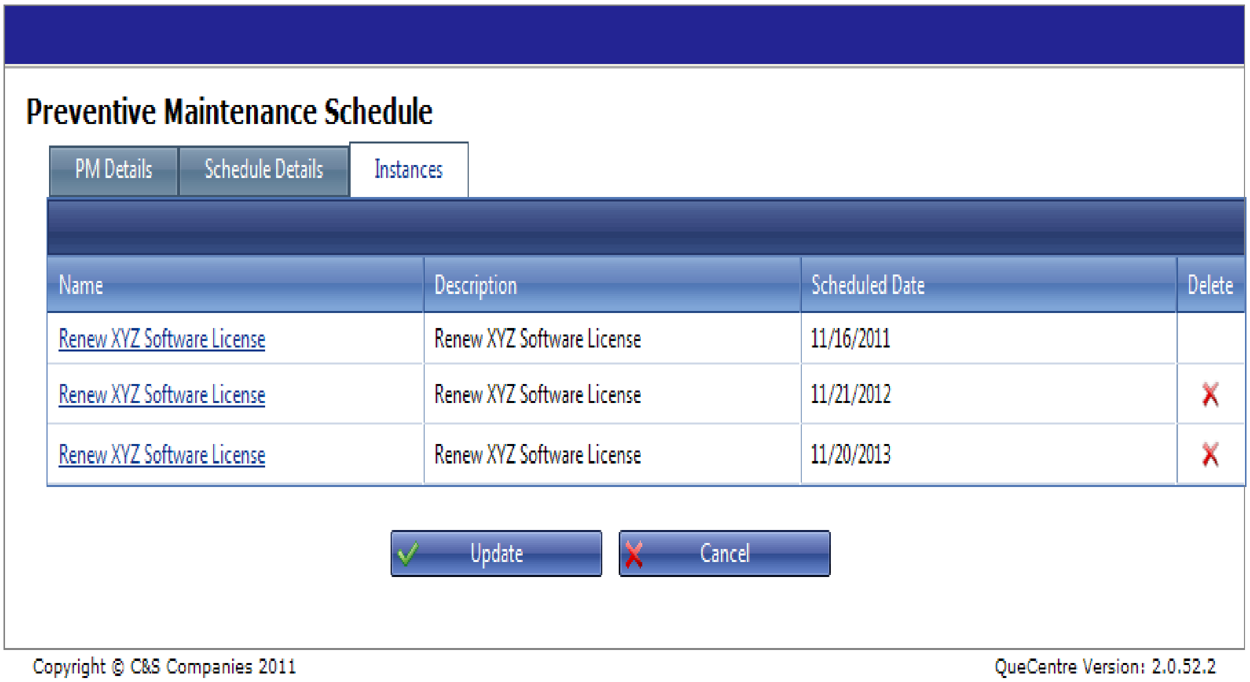



**Figure 36 Preventive Maintenance - Instances**

## View PM Calendar

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

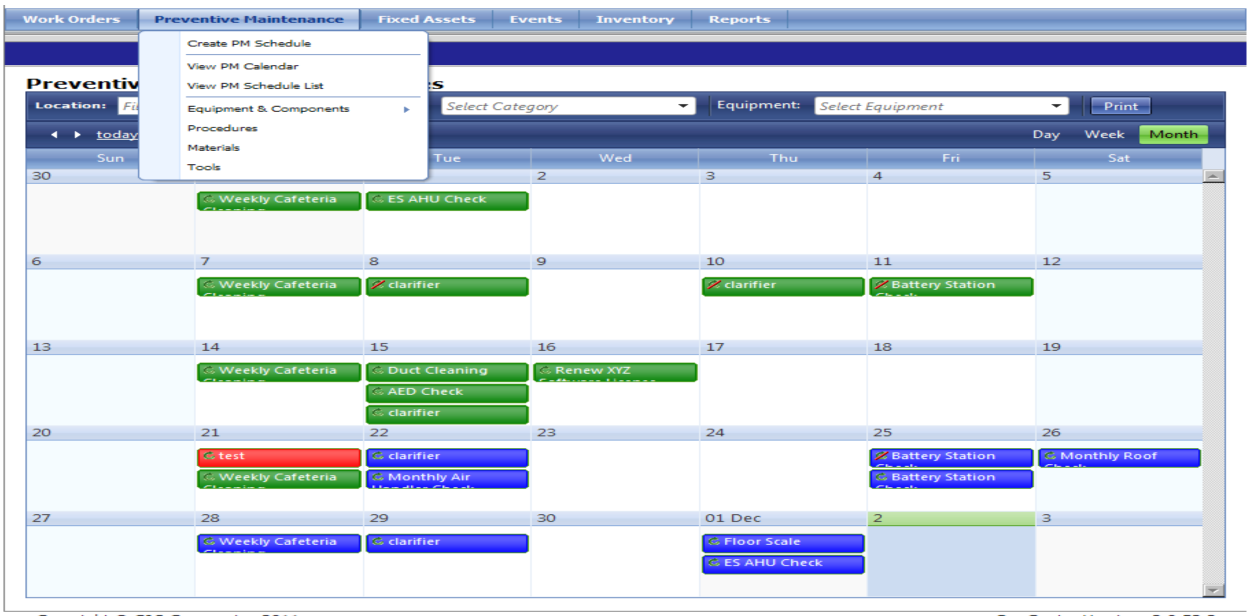
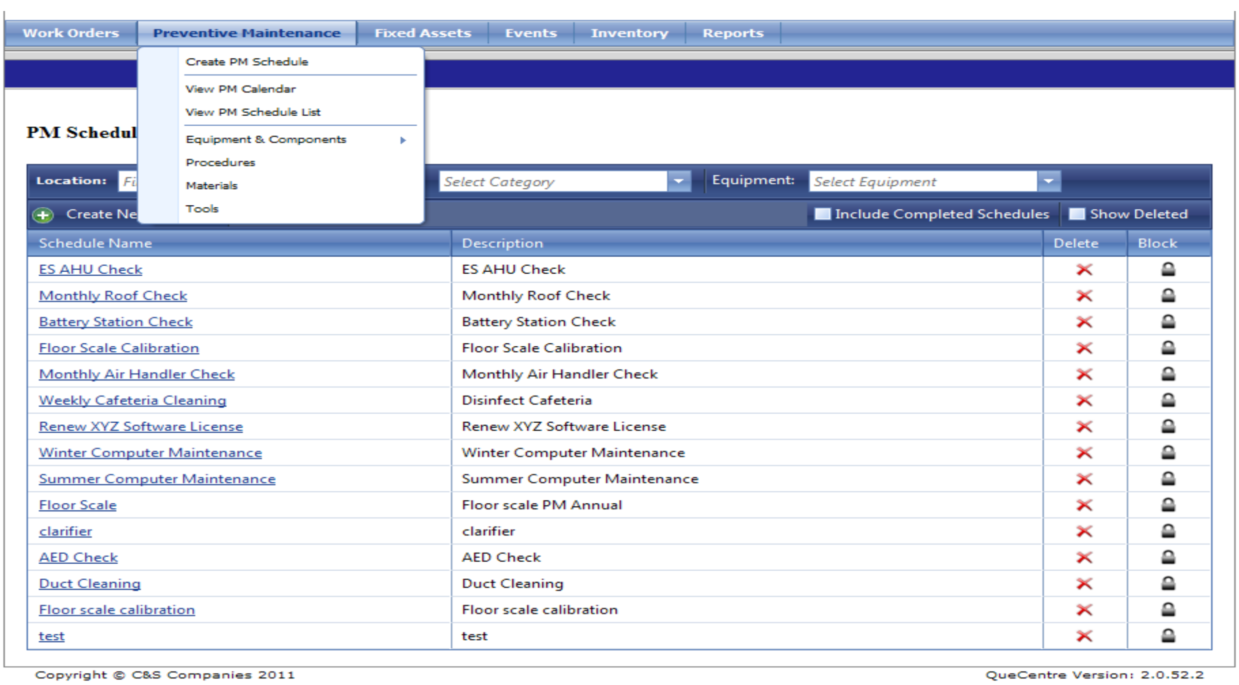



Figure 37 Preventive Maintenance - View PM Calendar

## 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.

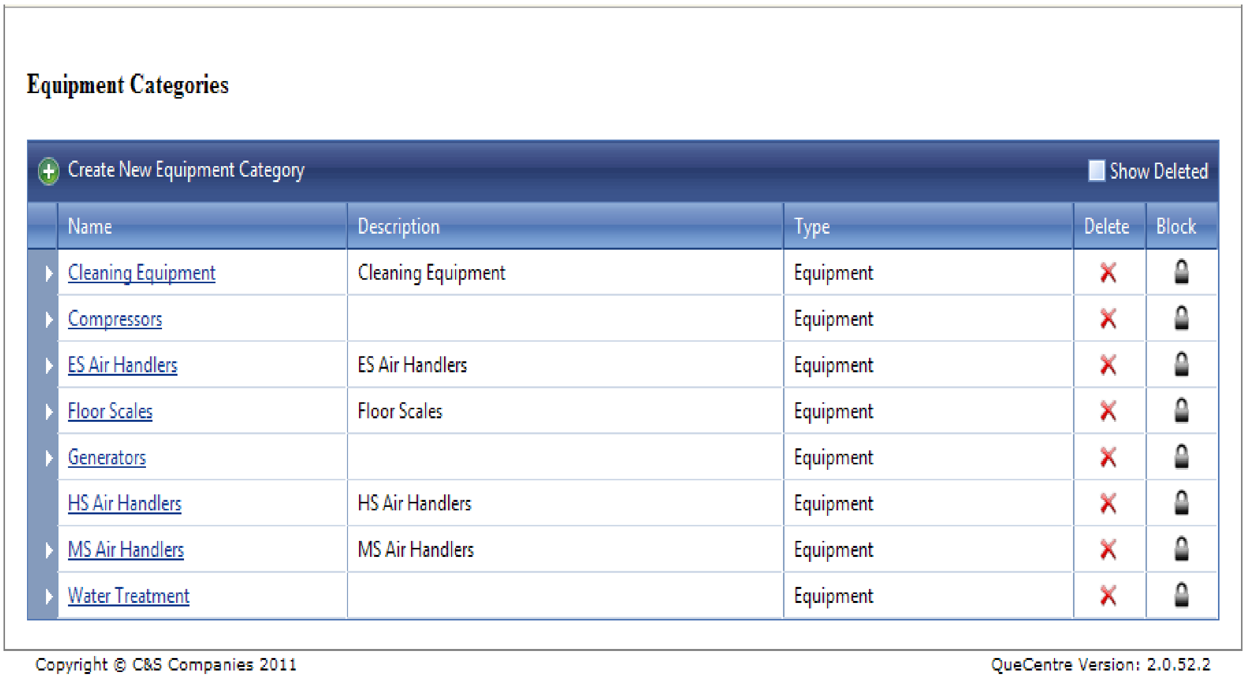


## Equipment and Components

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 | | |



**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

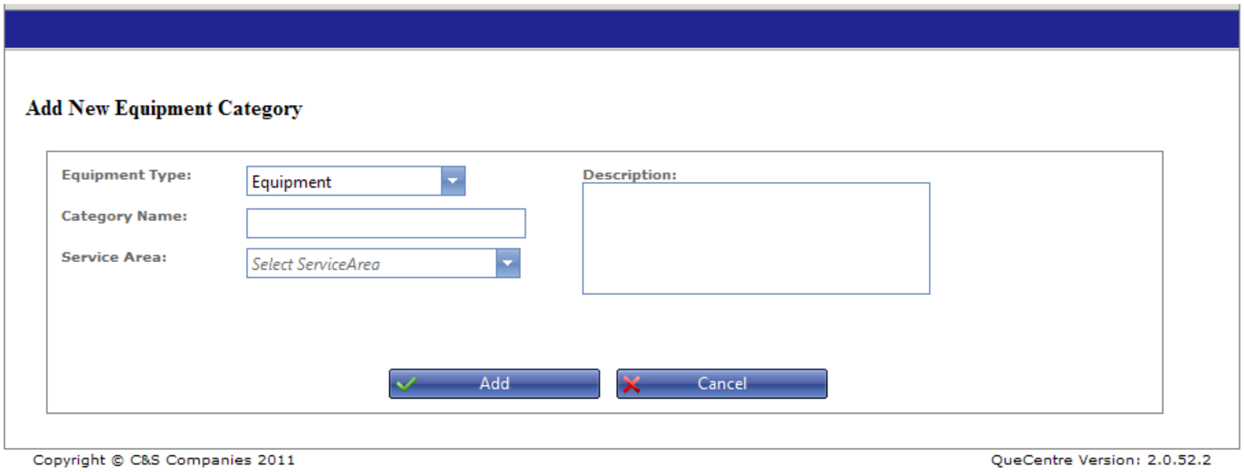



Figure 39 Preventive Maintenance - Add Equipment Category

## Equipment and Components

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

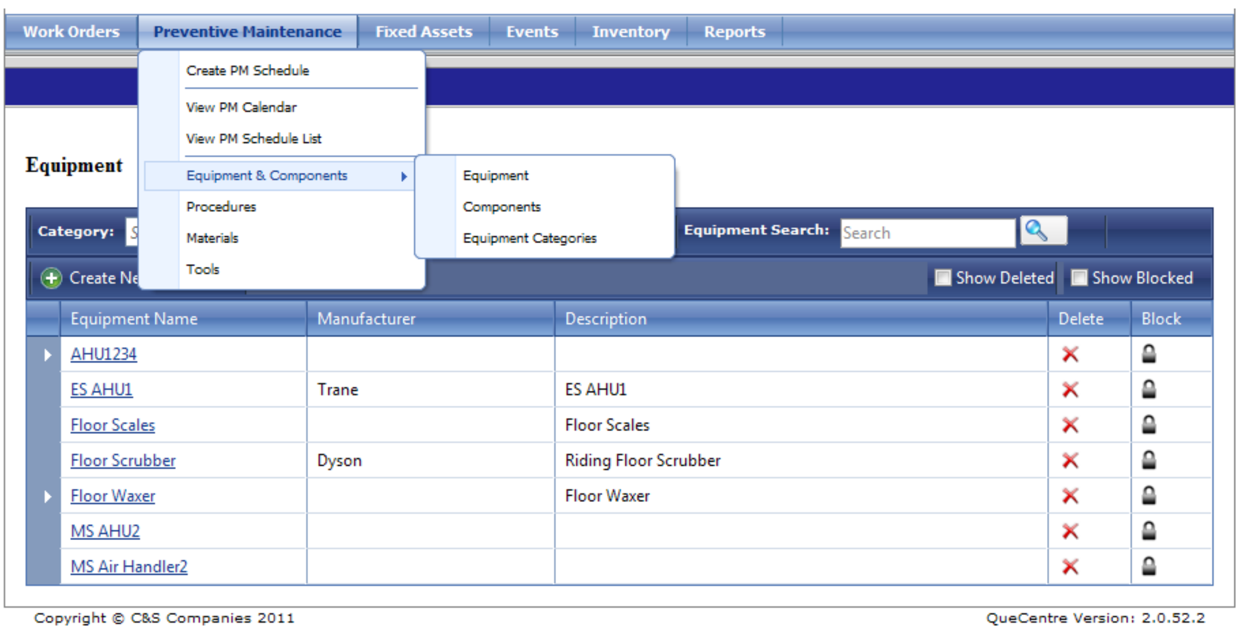



Figure 40 Preventive Maintenance – Equipment

## *Add New Equipment*

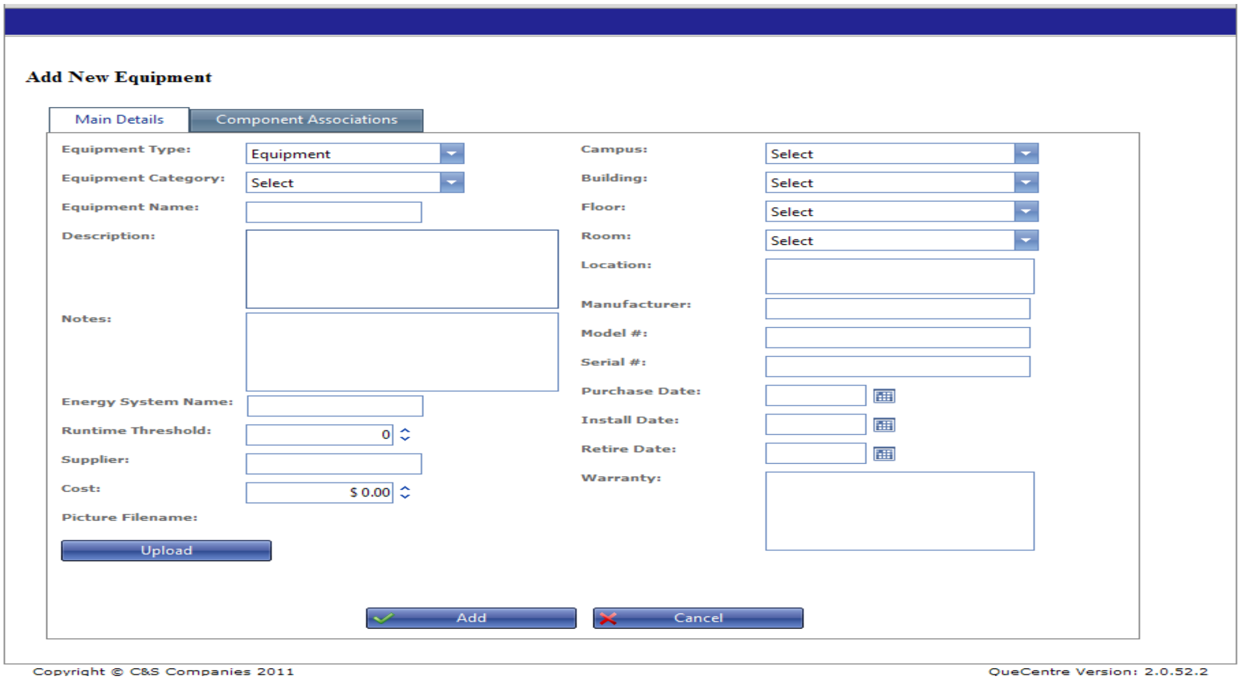



**Figure 41 Preventive Maintenance - Add Equipment**

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.

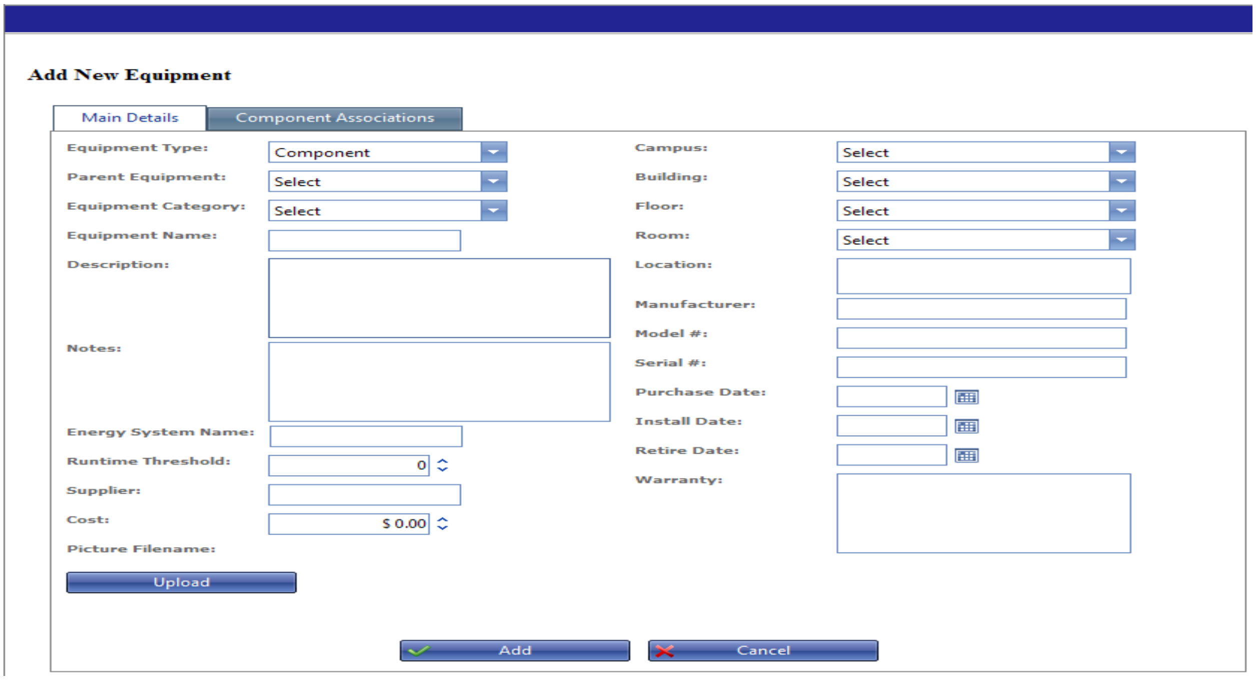



**Figure 42  Preventive Maintenance - Add Component**

- 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.

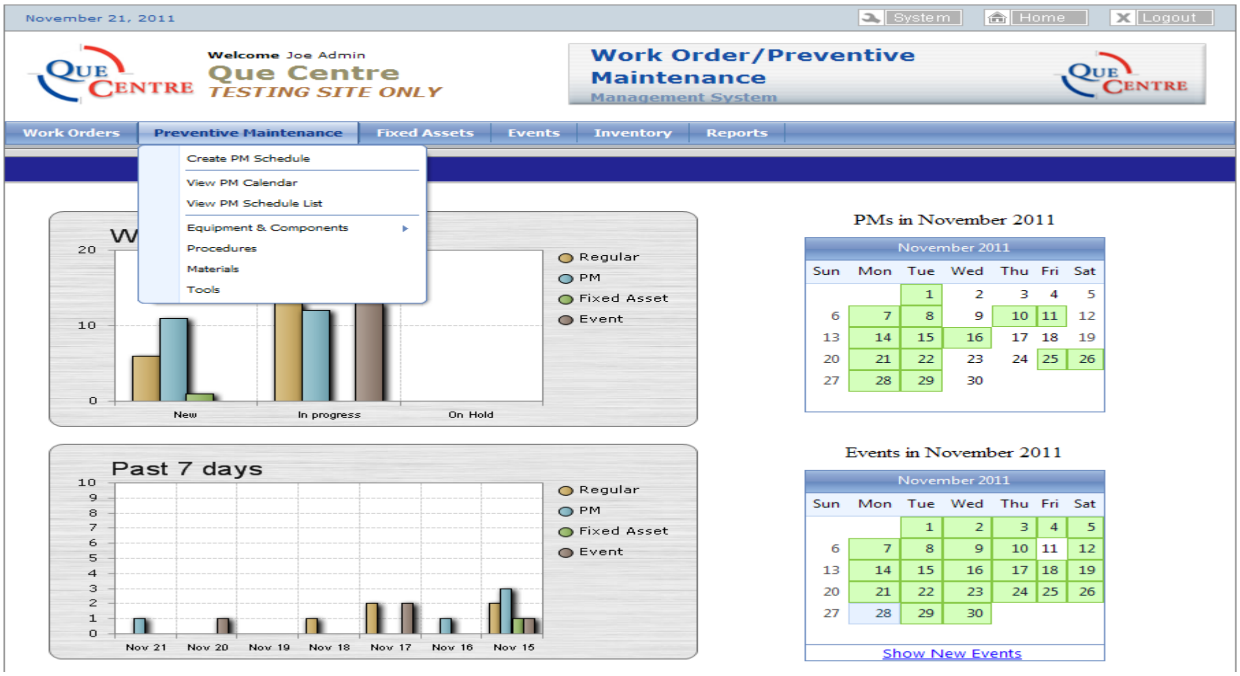
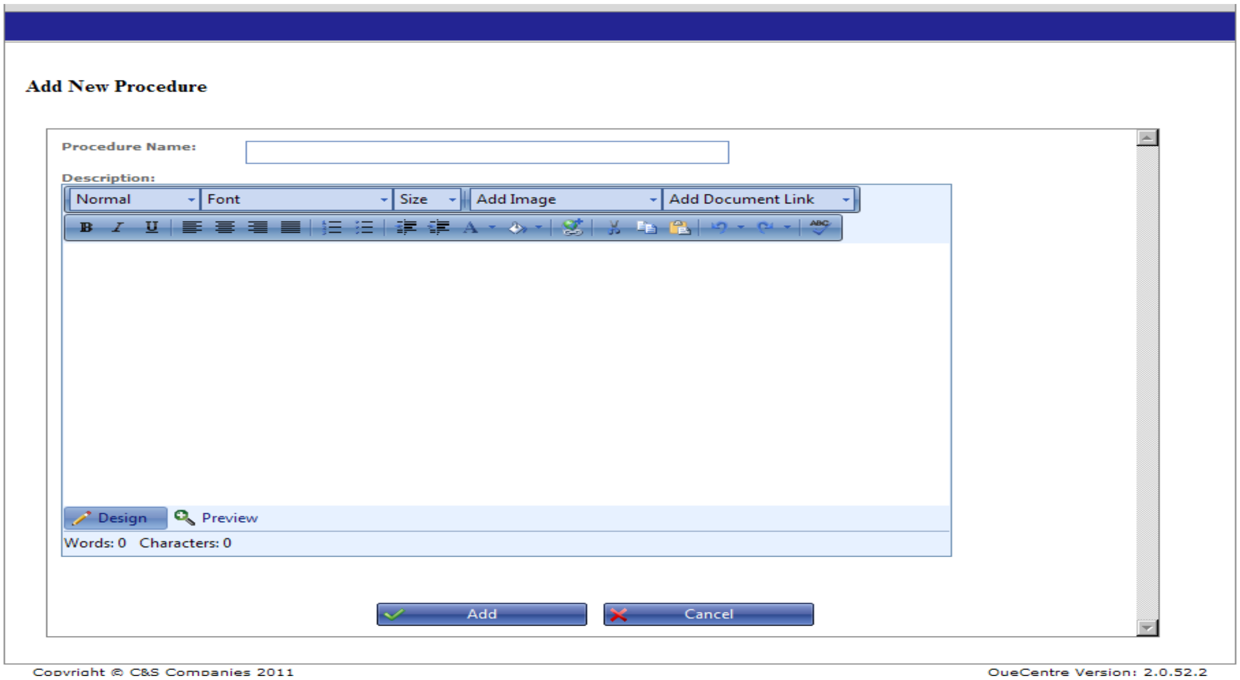



Figure 43 Preventive Maintenance – Procedures

## *Create New Procedure*




- 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.

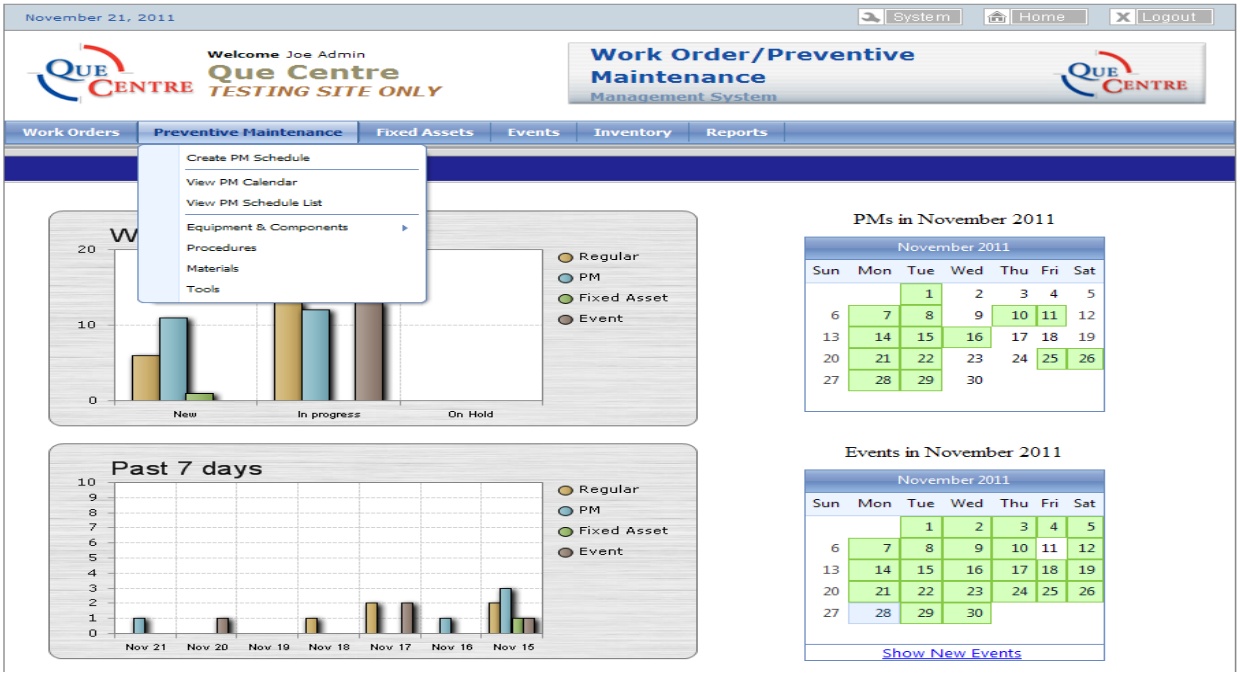



Figure 44 Preventive Maintenance - Materials

## *Create New Material*

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

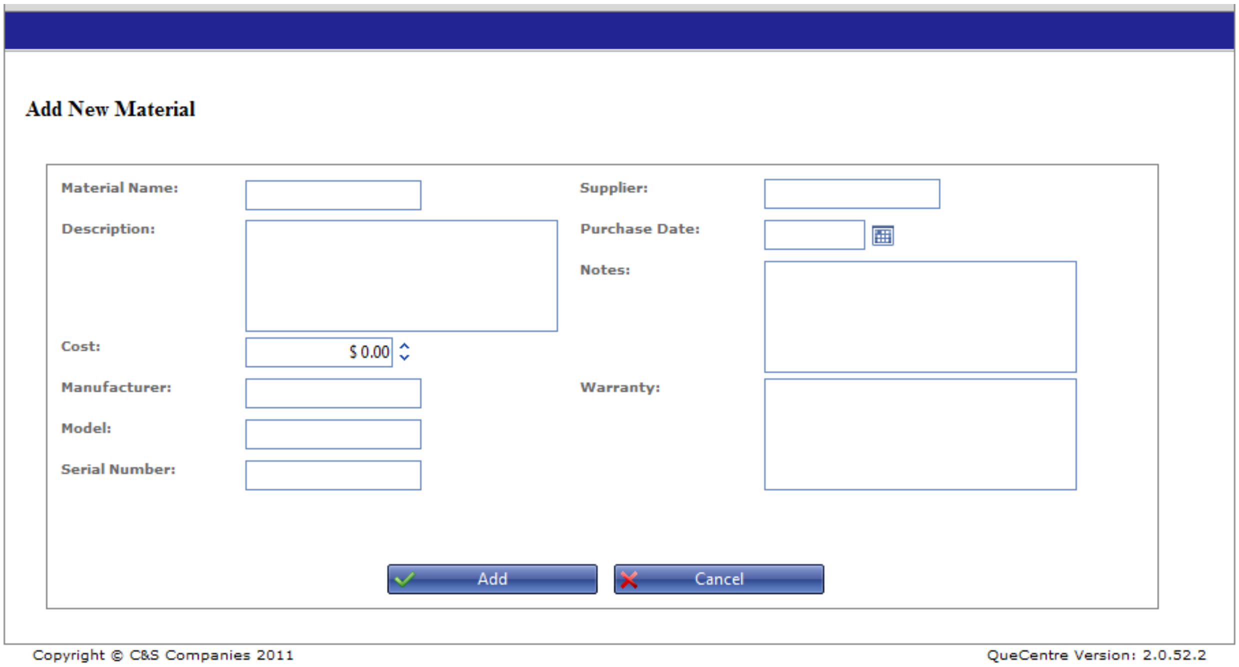



Figure 45 Preventive Maintenance - Add New Material

- 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.

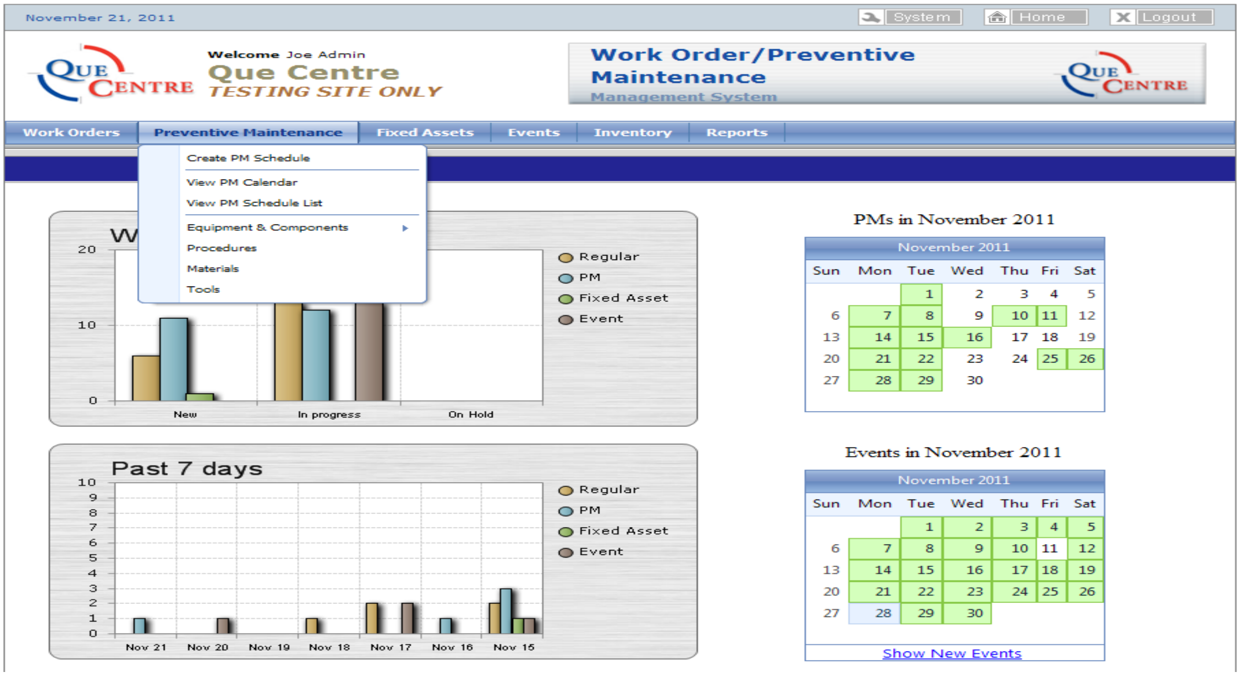
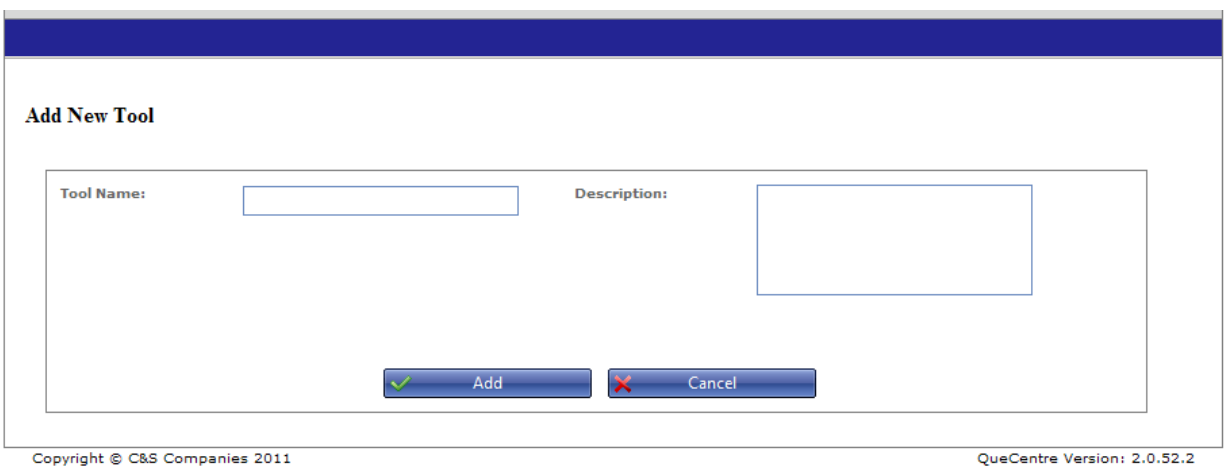



Figure 46 Preventive Maintenance – Tools

## *Add New Tool*

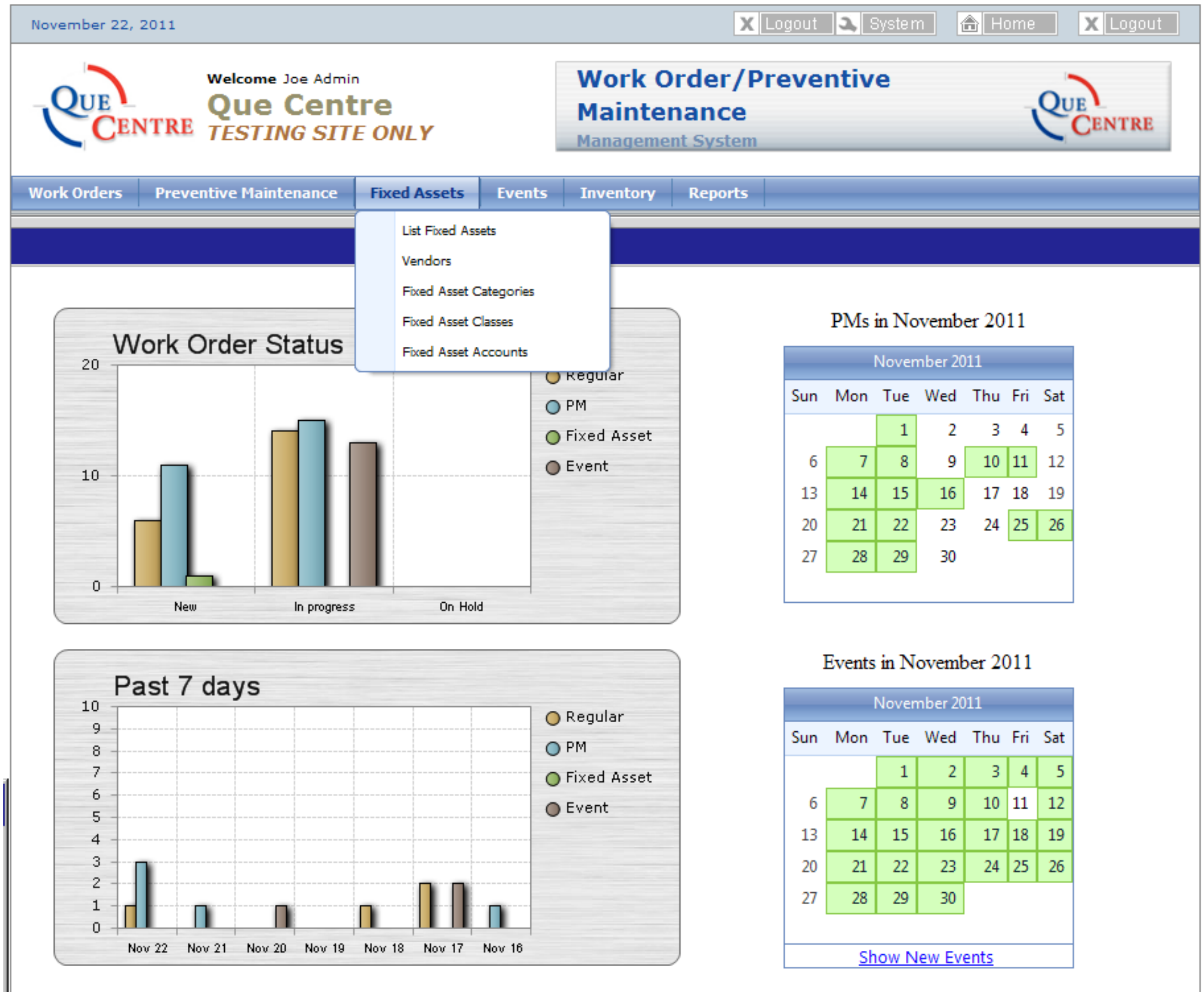



- Name the tool and add a description of desired.
- Click Add to save the tool

Once saved, the Tool can be added to a Procedure

## Fixed Assets

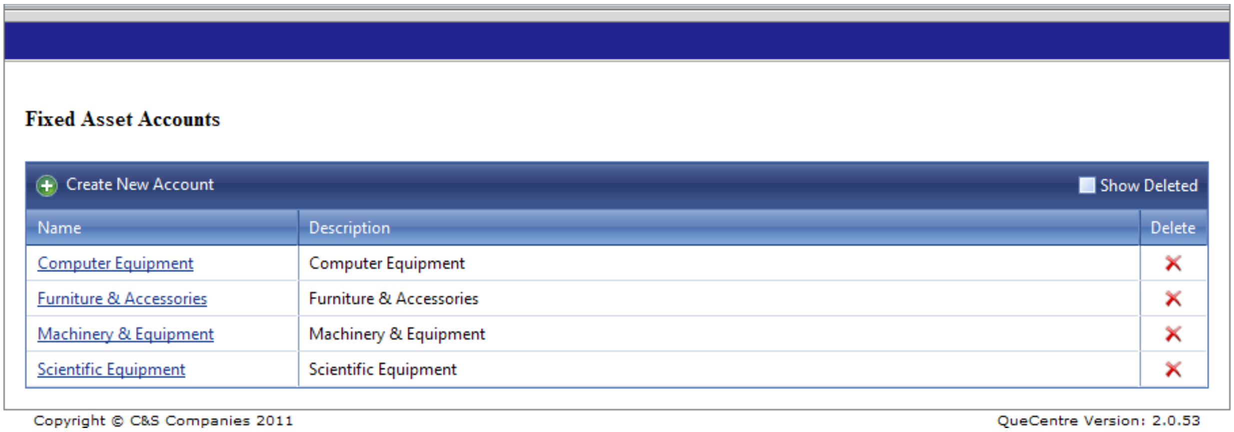
Clicking on the Fixed Assets tab at the top of the Dashboard will open a drop down box with Fixed Asset related choices. The choices available will depend on which privileges the logged in user has been assigned.




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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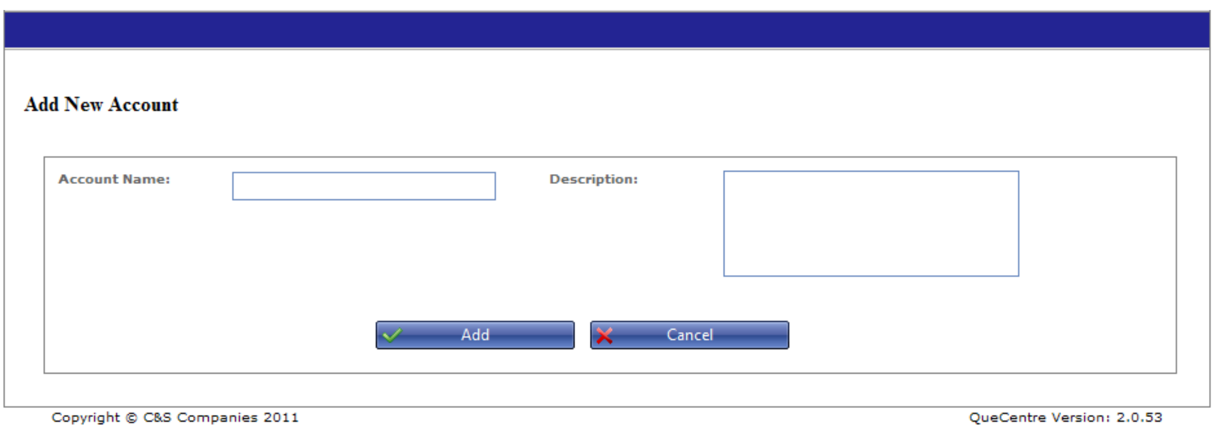
Figure 47 Fixed Assets – Accounts

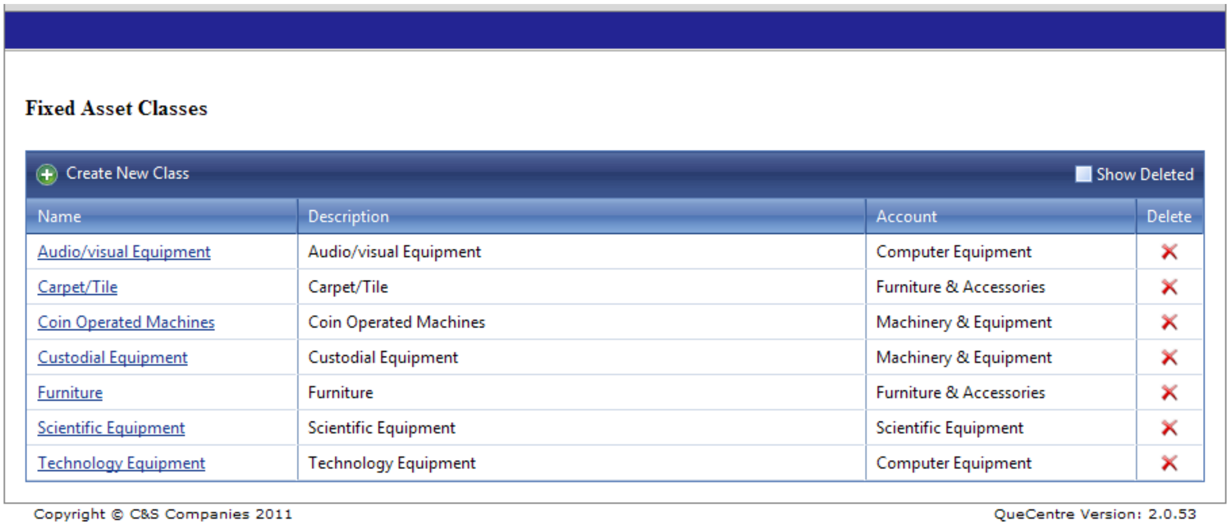
### *Create New Account*




- 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*

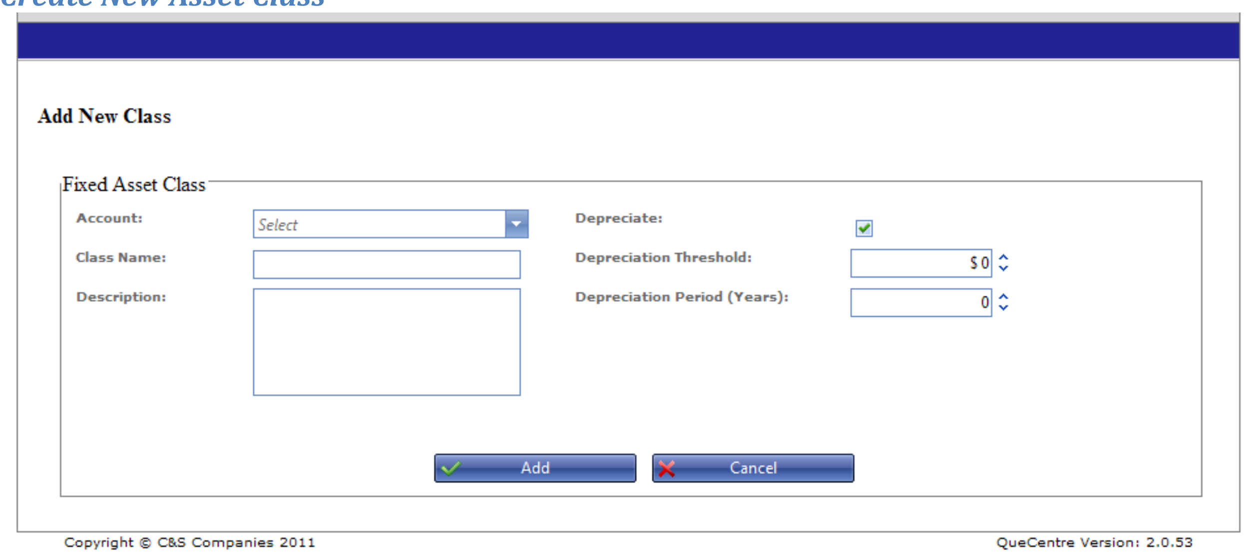
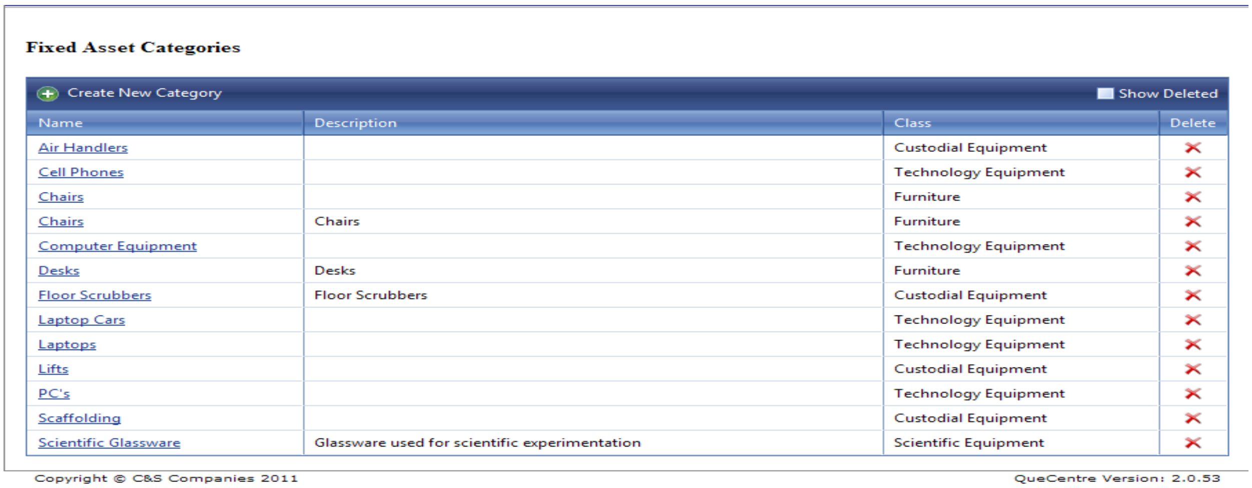



Figure 49 Fixed Assets - Create New Class

- 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**

Create New Category | 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*

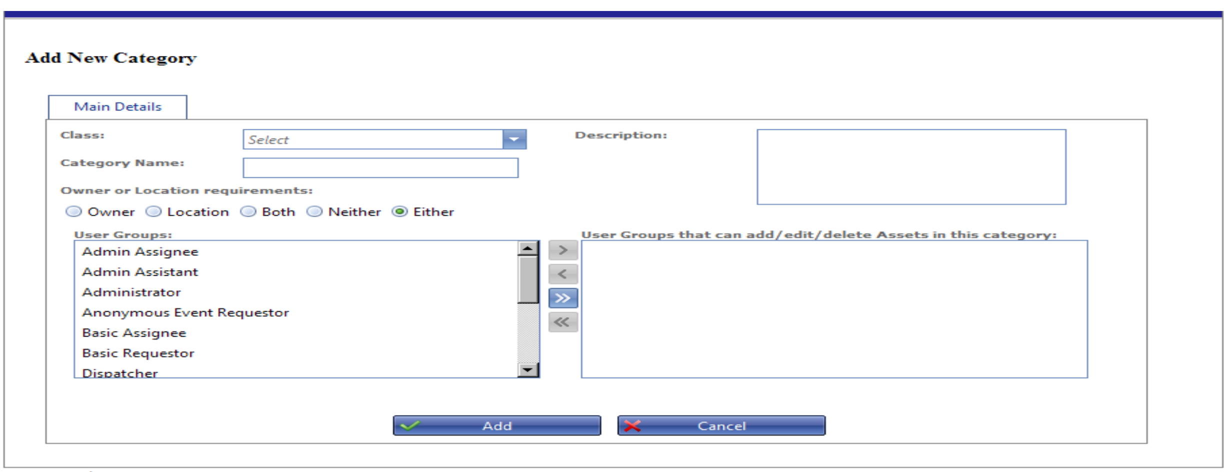



Figure 51  Fixed Asset - Create New Category

- 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.

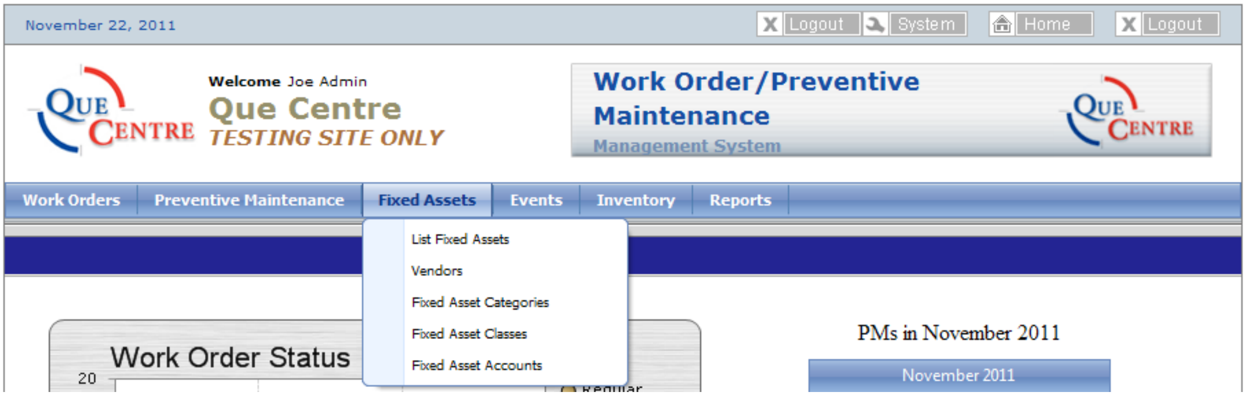



Figure 52 Dashboard - Fixed Assets

### *List Fixed Assets*

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


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*

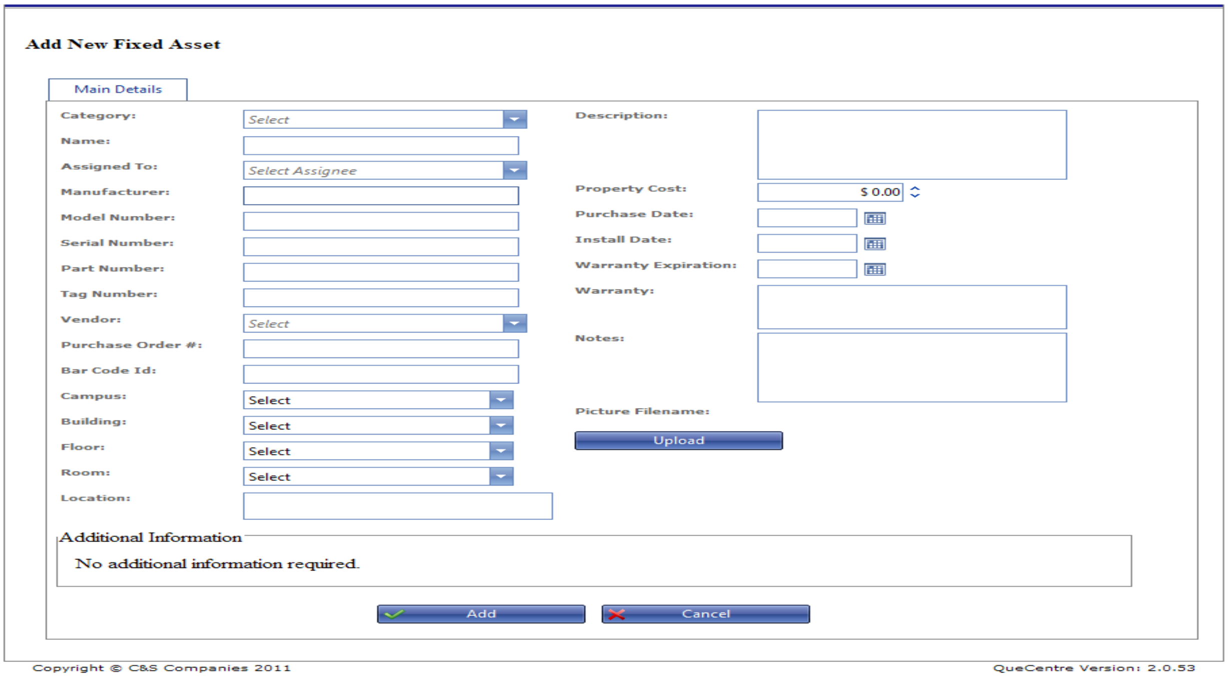



Figure 54 Fixed Asset - Create New Fixed Asset

- 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)
- 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.

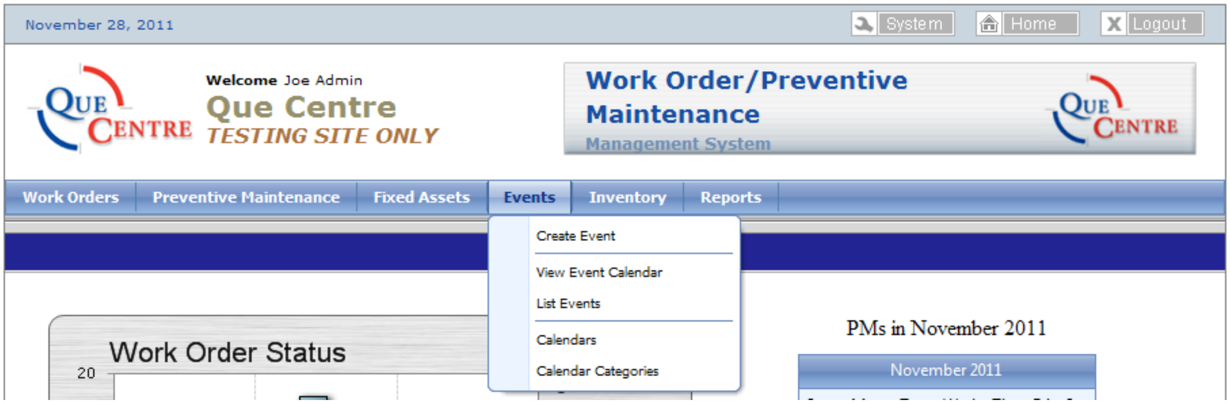
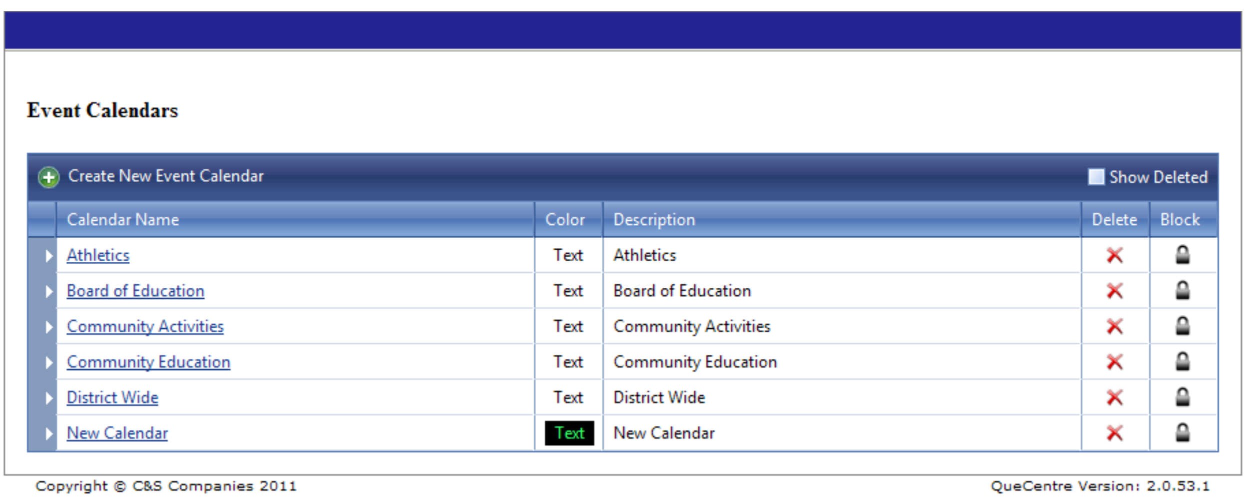



Figure 55 Dashboard – Events

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 — Show Deleted

| Calendar Name | Color | Description | Delete | Block |
|---|---|---|---|---|
| Athletics | Text | Athletics | ✕ | |
| Board of Education | Text | Board of Education | ✕ | |
| Community Activities | Text | Community Activities | ✕ | |
| Community Education | Text | Community Education | ✕ | |
| District Wide | Text | District Wide | ✕ | |
| New Calendar | Text | New Calendar | ✕ | |

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Figure 56 Events – Calendars

### *Create New Calendar*

Click on Create New Event Calendar on the Calendar list screen

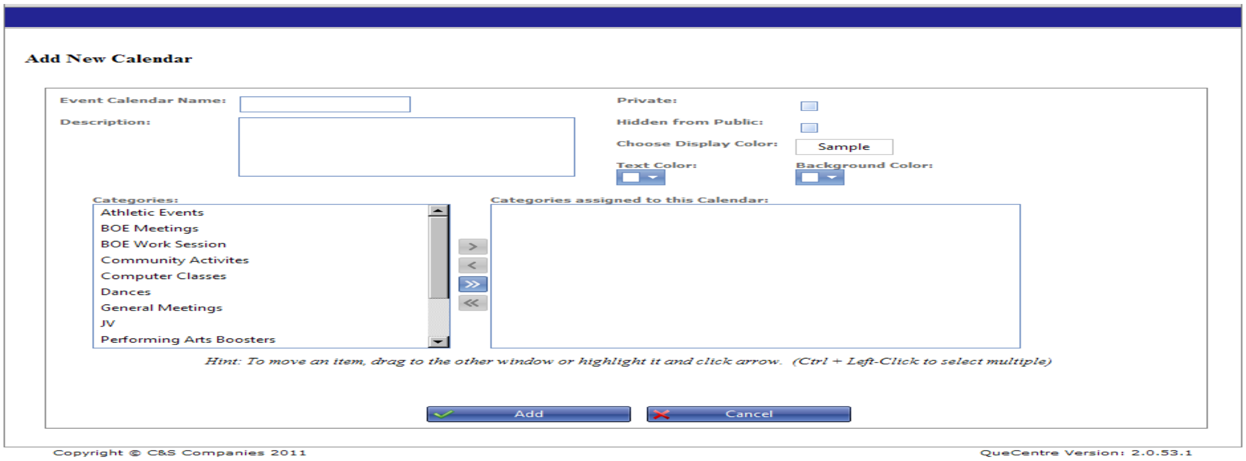



Figure 57 Events - Create Calendar

- 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 und the Events Tab.


| Category Name | Description | Calendar | Delete | Block |
|---|---|---|---|---|
| Athletic Events | Athletic Events | Athletics | | |
| BOE Meetings | BOE Meetings | Board of Education | | |
| BOE Work Session | BOE Work Session | Board of Education | | |
| Community Activites | Community Activites | Community Activities | | |
| Computer Classes | Computer Classes | Community Education | | |
| Dances | Dances | New Calendar | | |
| General Meetings | General Meetings | District Wide | | |
| JV | JV | Athletics | | |
| Performing Arts Boosters | Performing Arts Boosters | Community Activities | | |
| Personal Enrichment | Personal Enrichment | Community Education | | |
| PTSA | PTSA | Community Activities | | |
| Sports Boosters | Sports Boosters | Community Activities | | |
| Varsity | Varsity | Athletics | | |



Figure 58 Events - Calendar Categories

### *Create New Calendar Category*

Click on Create New Calendar Category

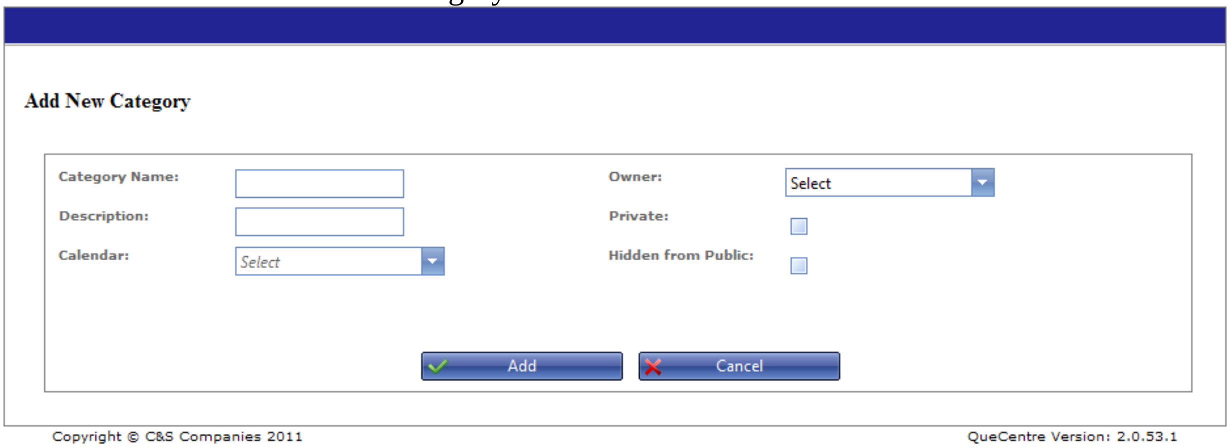



**Figure 59 Events - New Calendar Category**

- 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.

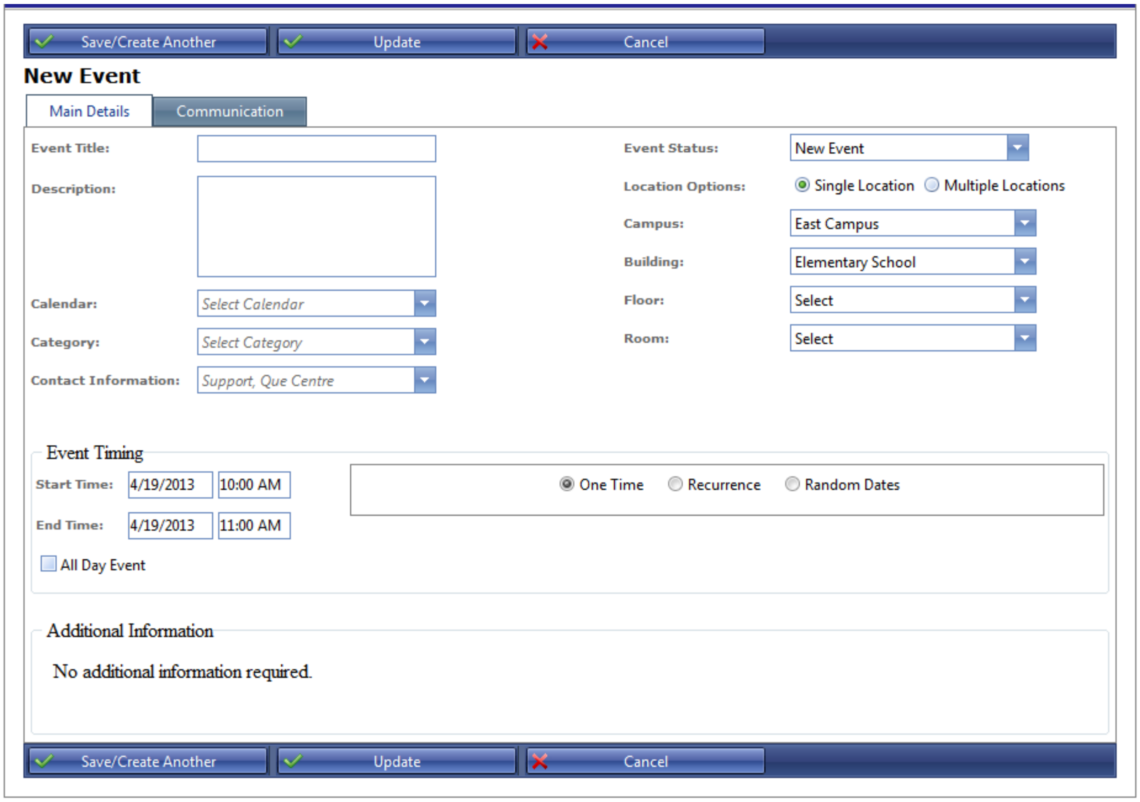



**Figure 60 Create New Event**

- 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.

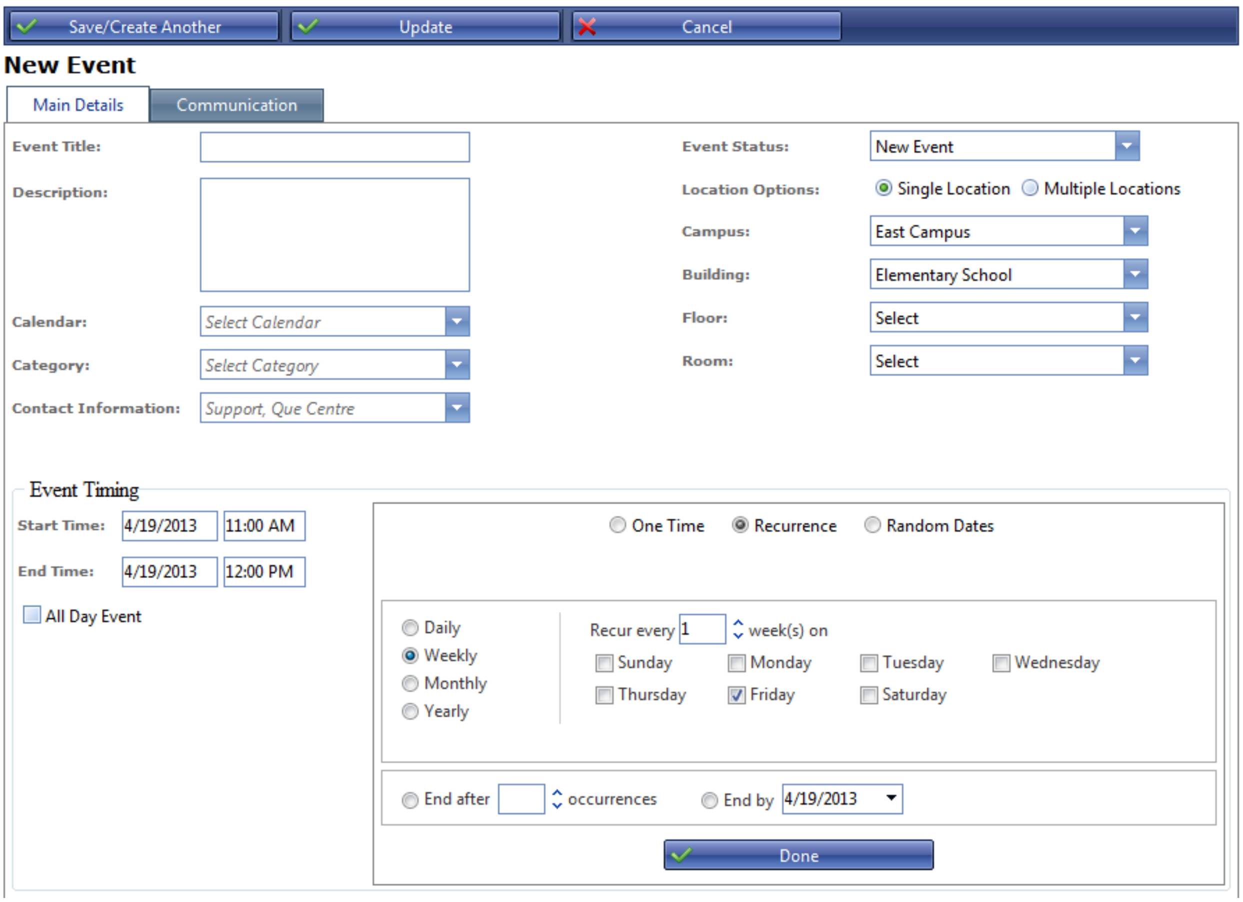
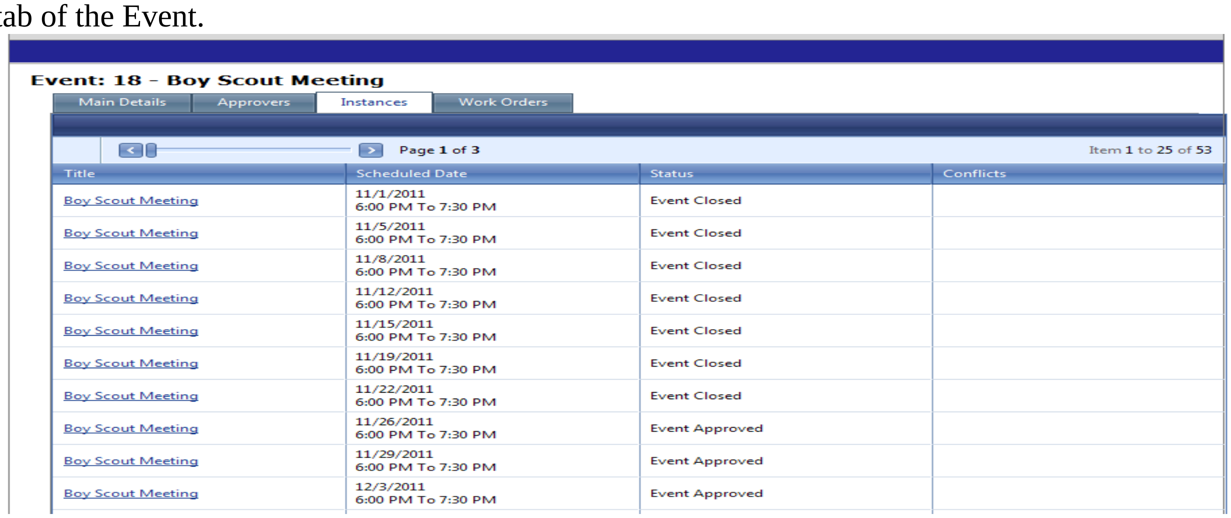



Figure 61 Events – Recurrence

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

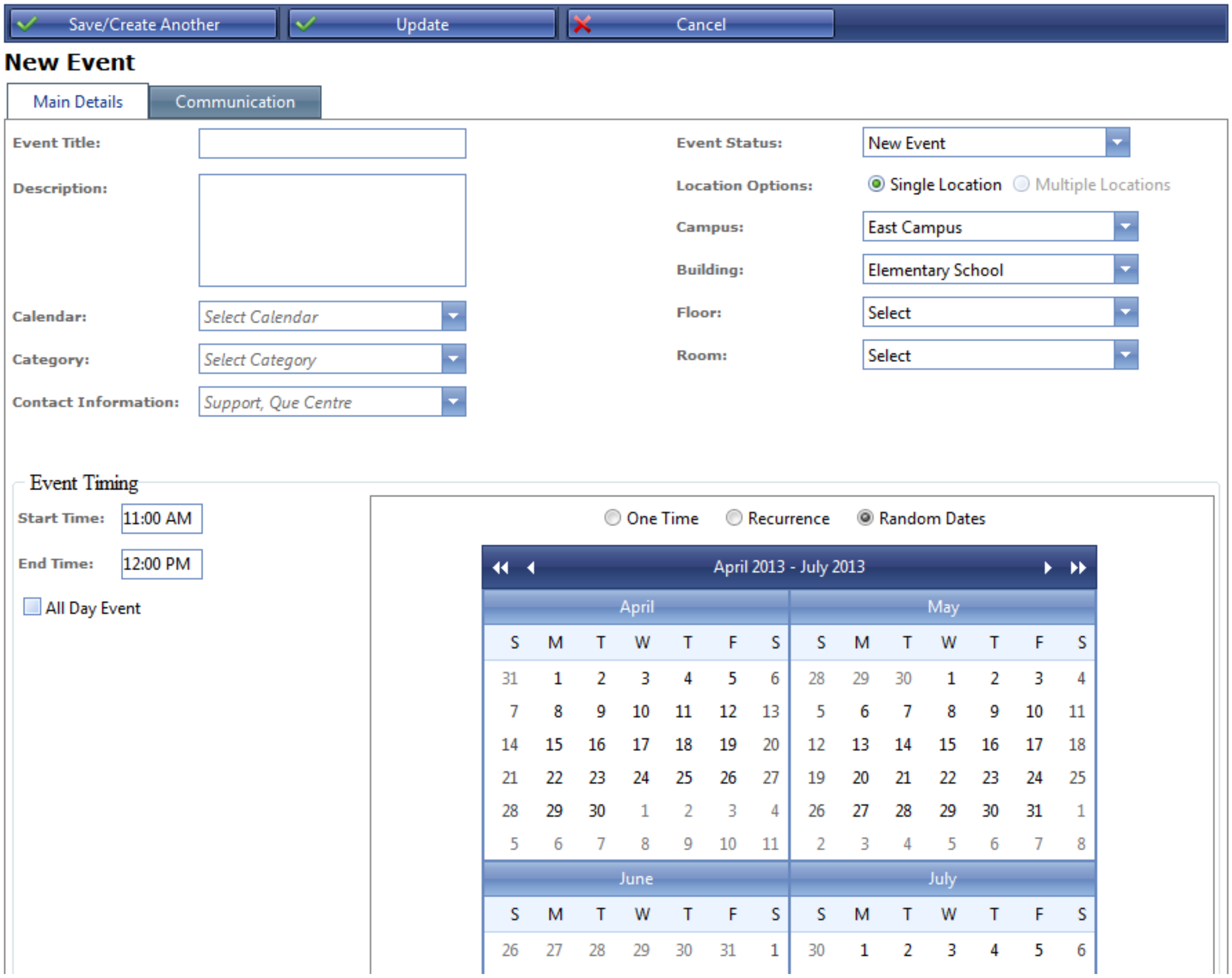
Main Details | Approvers | Instances | Work Orders

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 | |

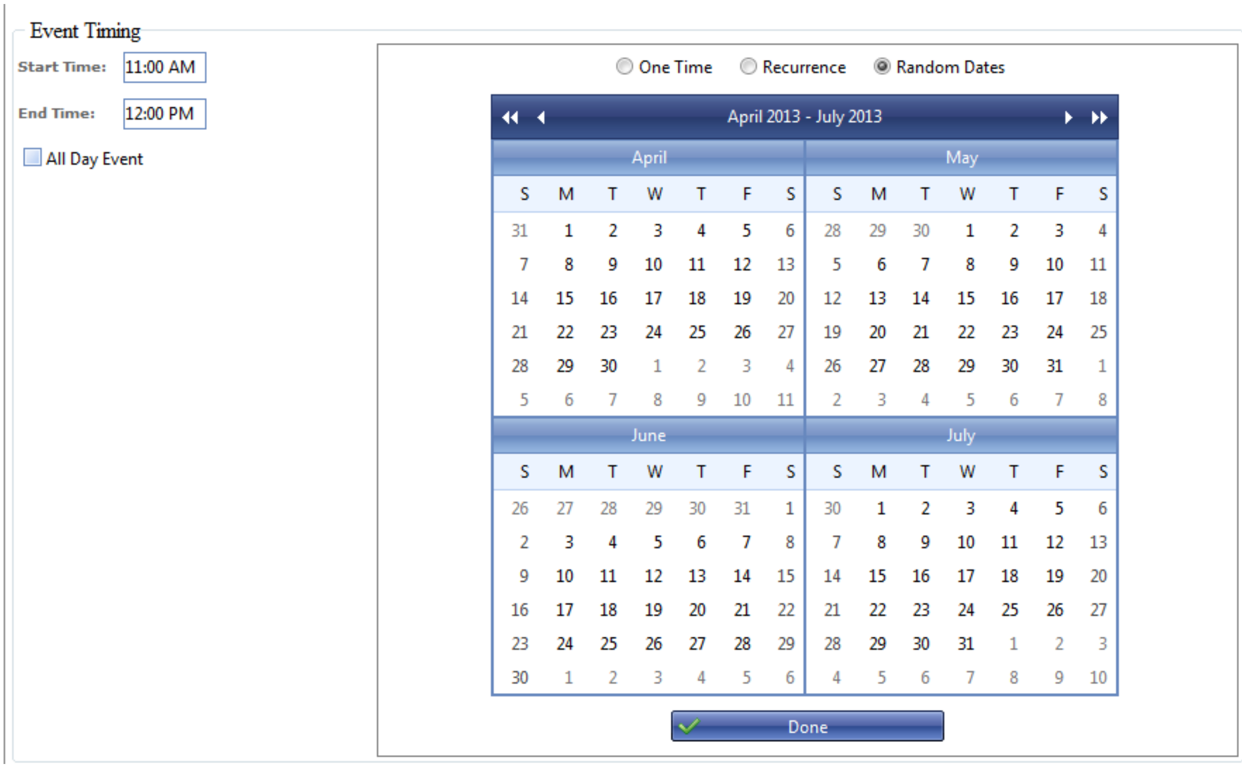
### *Random Dates*

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

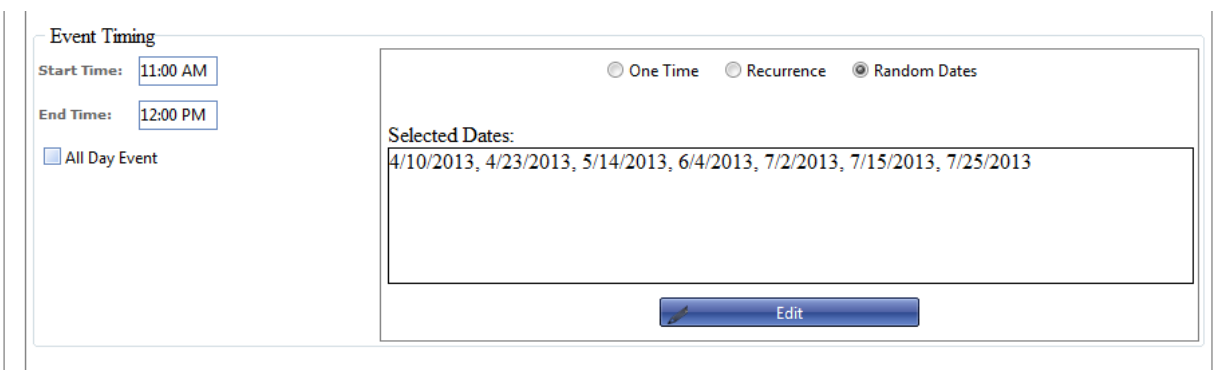



- When "Random Dates" is selected, a calendar interface will display, allowing user to scroll through and select dates as needed.
- Calendar interface will allow user to scroll o different weeks, months and years
- Events created using Random Dates will not be linked as multiple instances of an event, 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)*




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




- 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.

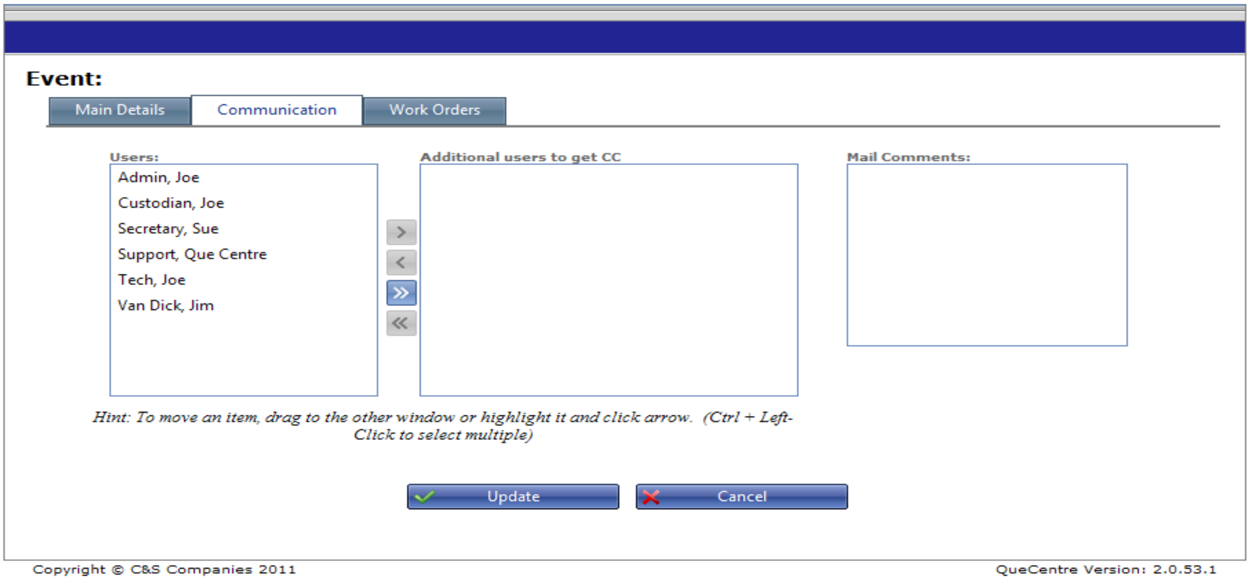



**Figure 62 Events – Communication**

## *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.

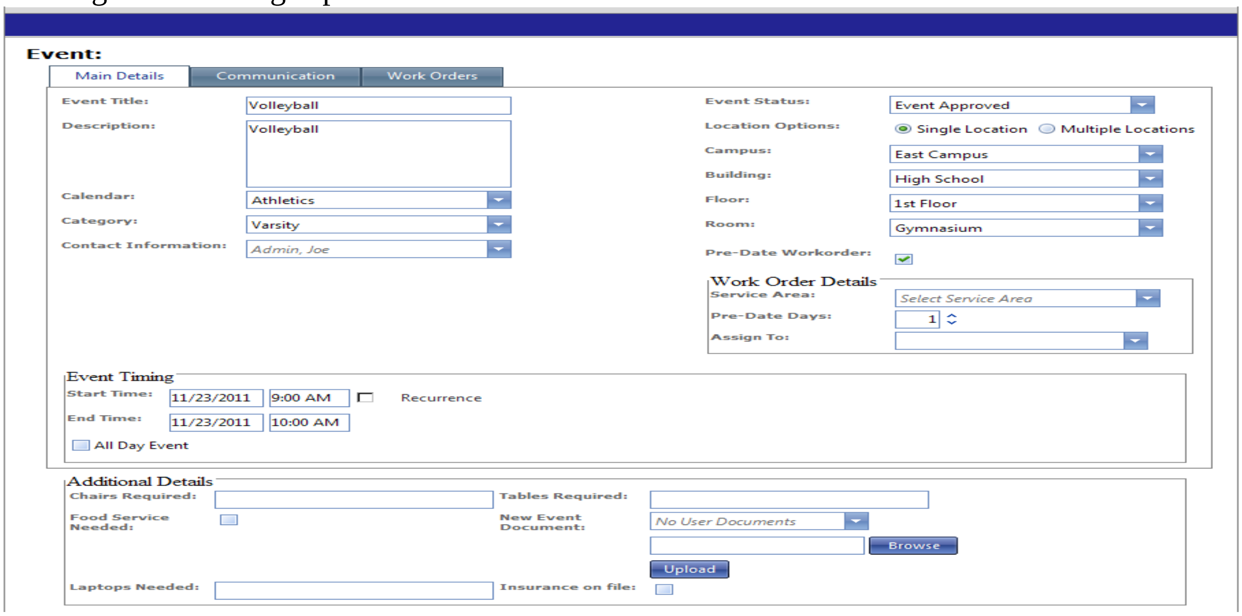



Figure 63 Events - Pre Date Work Order

- 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.

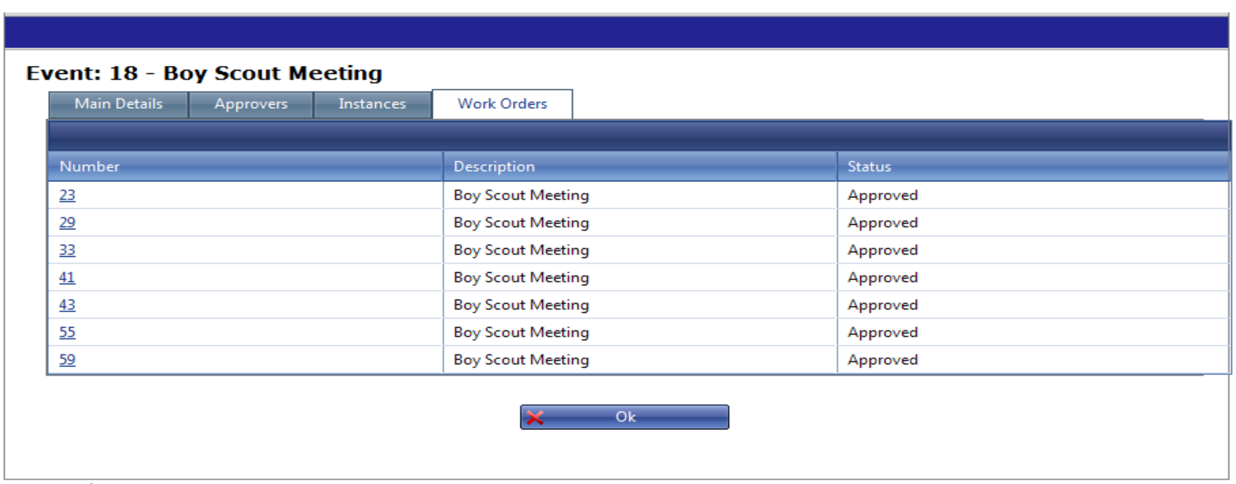



Figure 64 Events - Work Orders

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.

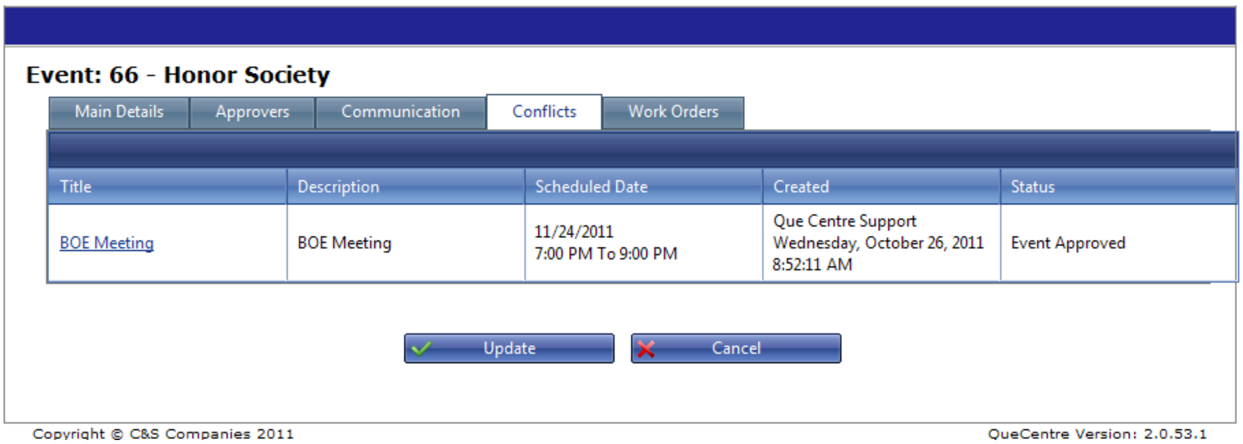


**Figure 65 Events - Conflicts**

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.

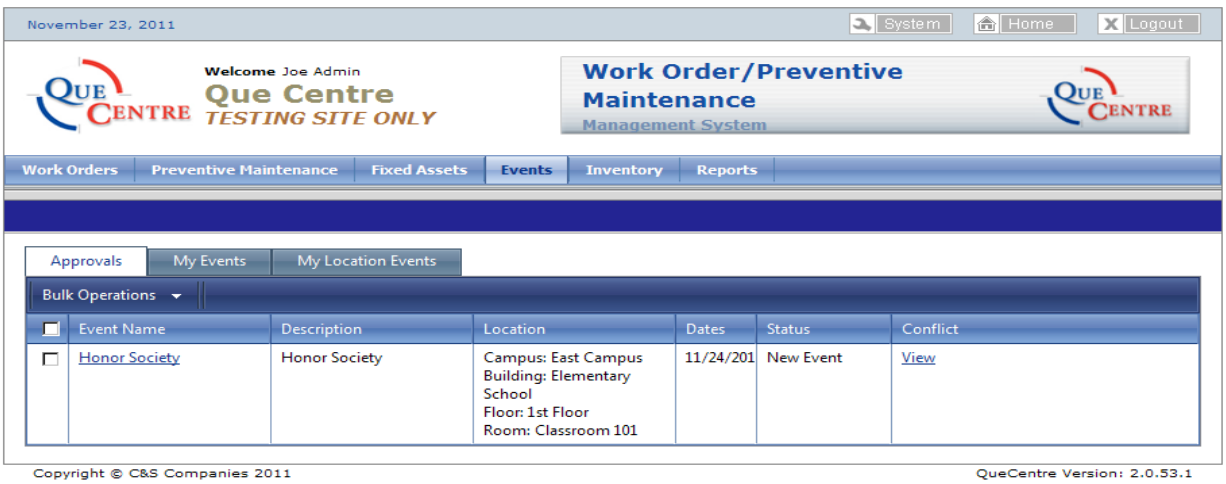


Figure 66 List Events – Approvals.

### 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.

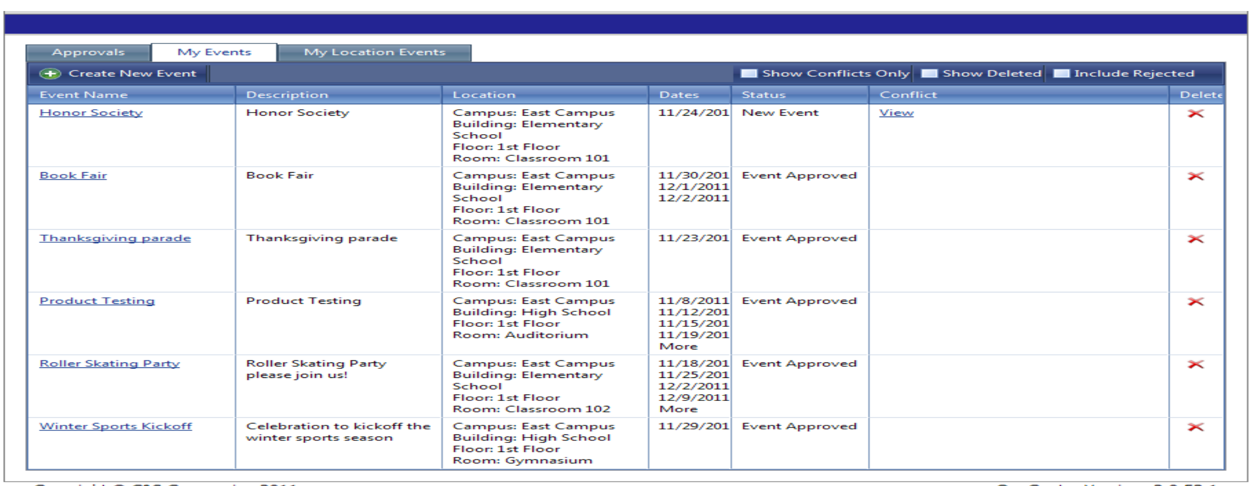


Figure 67 Events - My Events

## *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.


| Event Name | Description | Location | Dates | Status | Conflict |
|---|---|---|---|---|---|
| Honor Society | Honor Society | Campus: East Campus<br>Building: Elementary School<br>Floor: 1st Floor<br>Room: Classroom 101 | 11/24/201 | New Event | View |
| Pep Rally | Pep Rally | Campus: East Campus<br>Building: High School<br>Floor: 1st Floor<br>Room: Gymnasium | 11/30/201 | Event Approved | |
| Zumba | Zumba | Campus: East Campus<br>Building: High School<br>Floor: 1st Floor<br>Room: Gymnasium | 11/22/201<br>11/23/201<br>11/29/201<br>11/30/201<br>More | Event Approved | |
| Book Fair | Book Fair | Campus: East Campus<br>Building: Elementary School<br>Floor: 1st Floor<br>Room: Classroom 101 | 11/30/201<br>12/1/2011<br>12/2/2011 | Event Approved | |
| Thanksgiving parade | Thanksgiving parade | Campus: East Campus<br>Building: Elementary School<br>Floor: 1st Floor<br>Room: Classroom 101 | 11/23/201 | Event Approved | |
| Product Testing | Product Testing | Campus: East Campus<br>Building: High School<br>Floor: 1st Floor | 11/8/2011<br>11/12/201<br>11/15/201 | 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

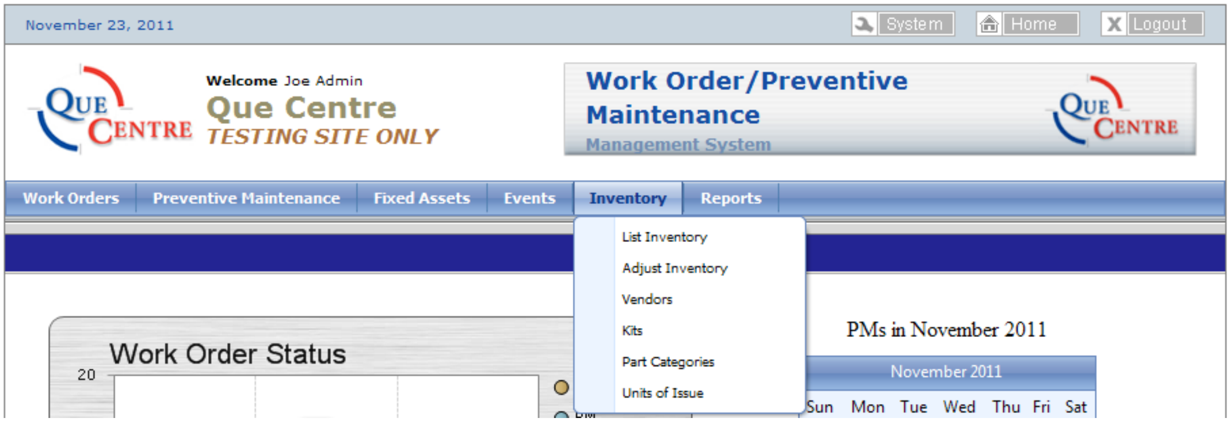



Figure 69 Dashboard - Inventory

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

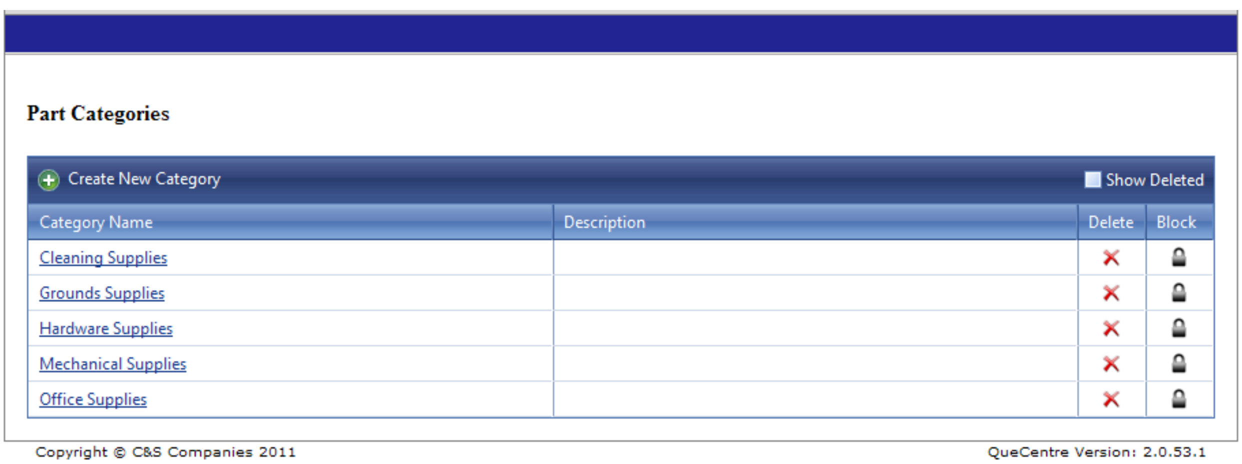
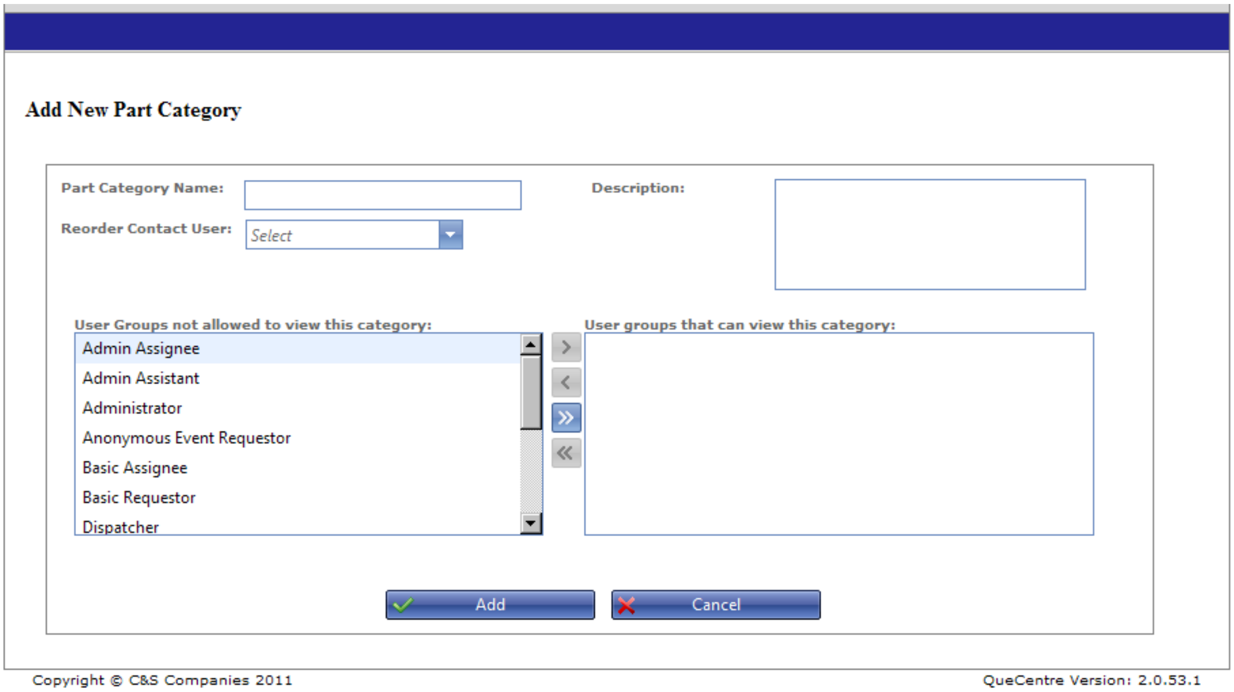



Figure 70 Inventory - Parts Category

## *Create New Parts Category*

Click on Create New Category




- 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.

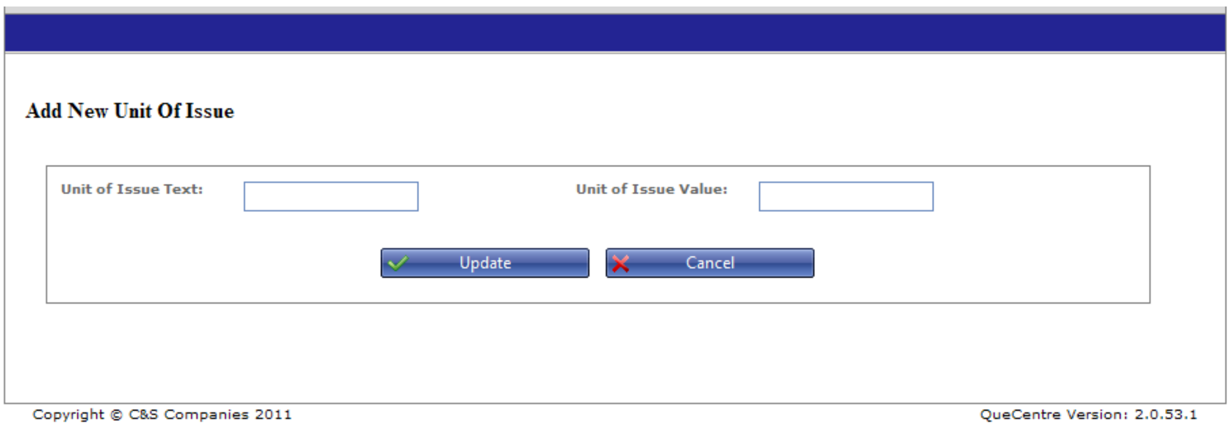
## Units of Issue

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.


Figure 71 Inventory - Units of Issue

### *Create New Unit of Issue*

Click on Create New Unit of Issue




- 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.

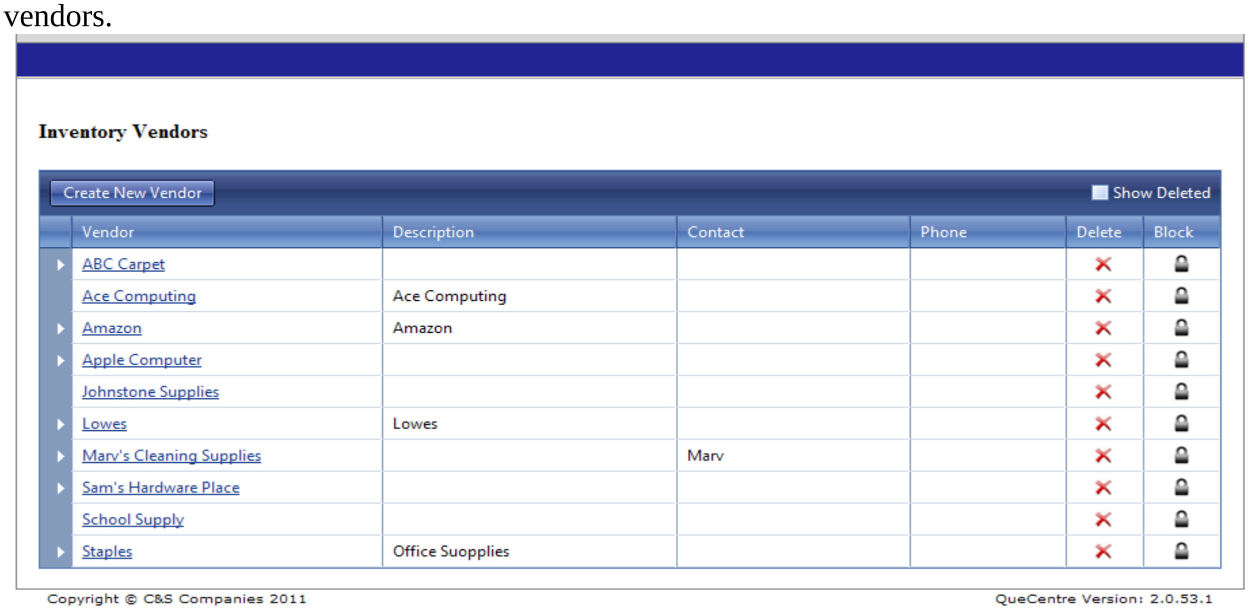



Figure 72 Inventory – Vendors

## *Create New Vendor*

Click on Create New Vendor.

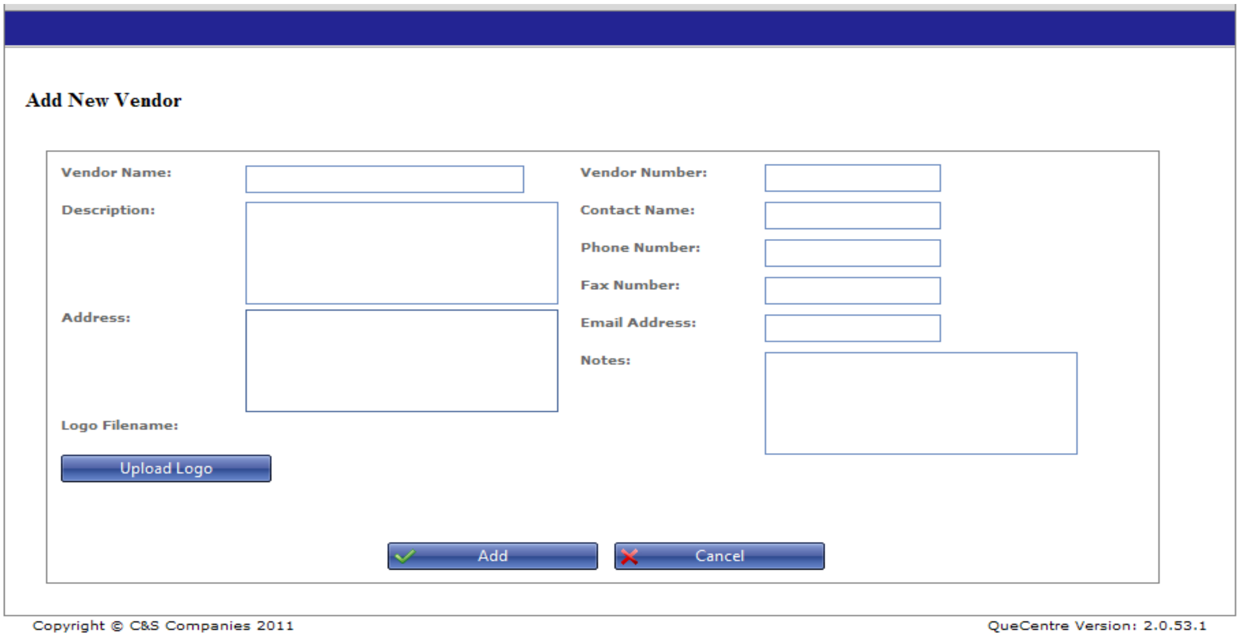



Figure 73 Inventory - Create Vendor

- 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.


| 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

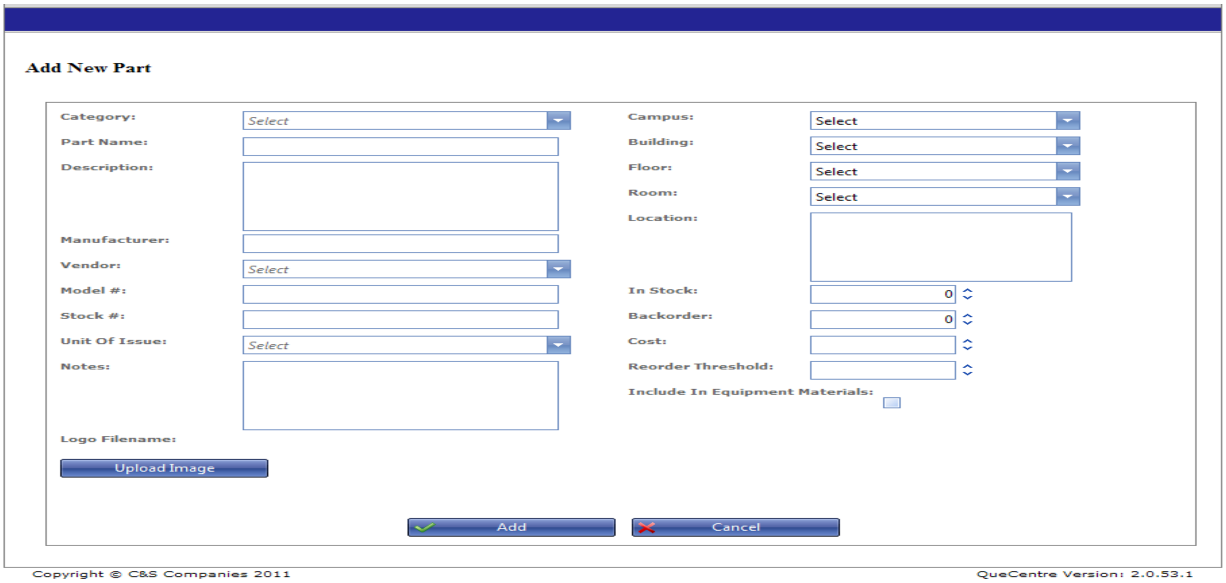



Figure 75 Inventory - Create New Part

- 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

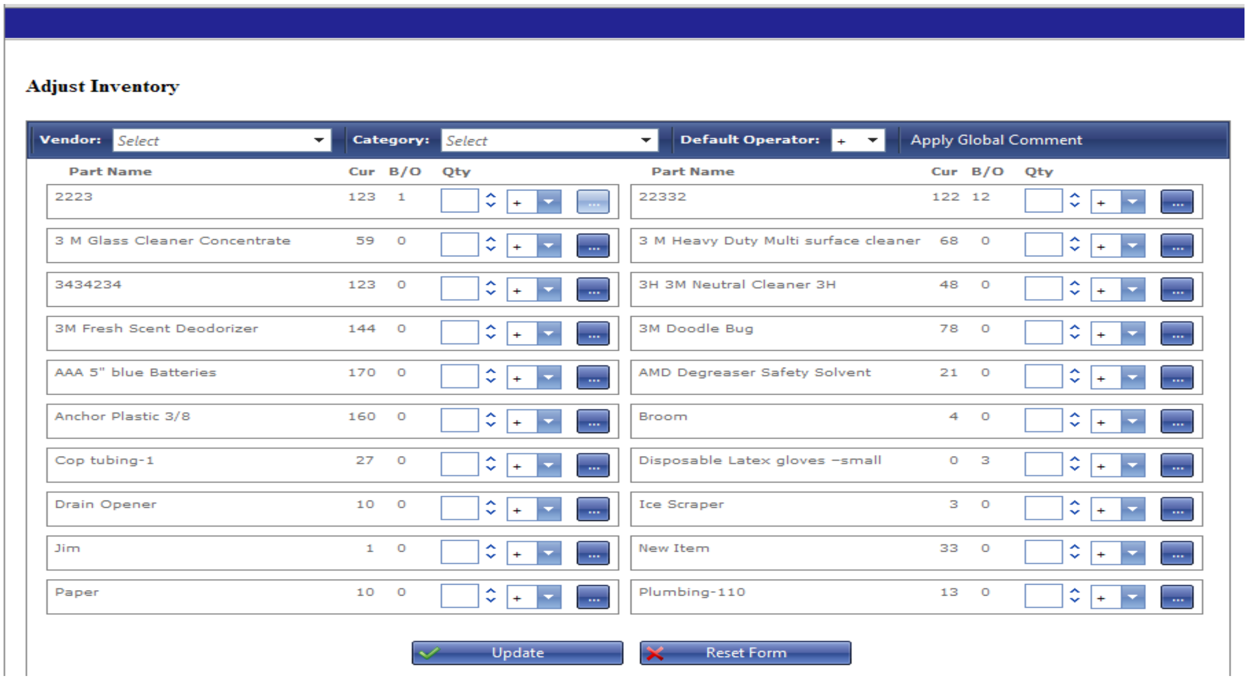



Figure 76 Inventory - Adjust Inventory

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.

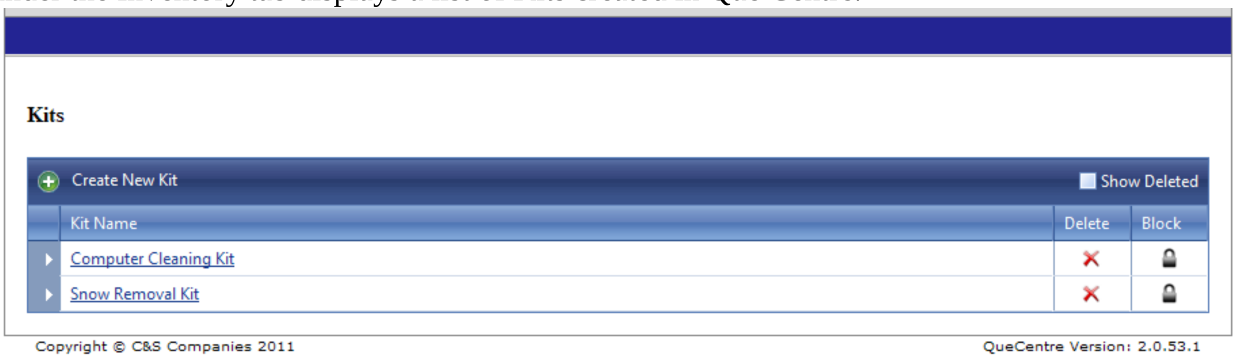



Figure 77 Inventory – Kits

### *Create New Kit*

Click Create New Kit

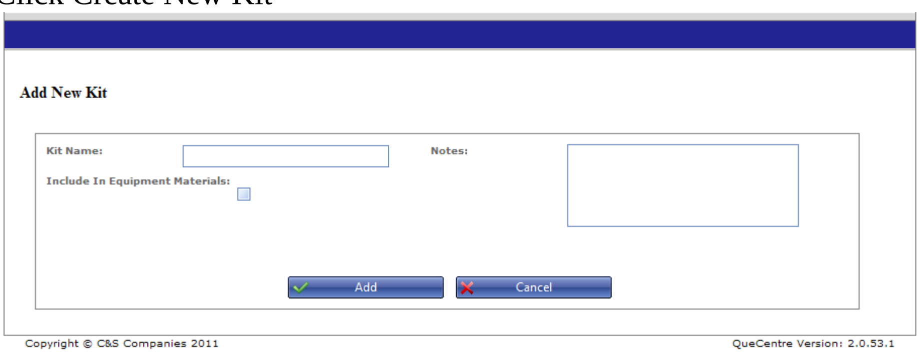



Figure 78 Inventory - Create New Kit

- 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.

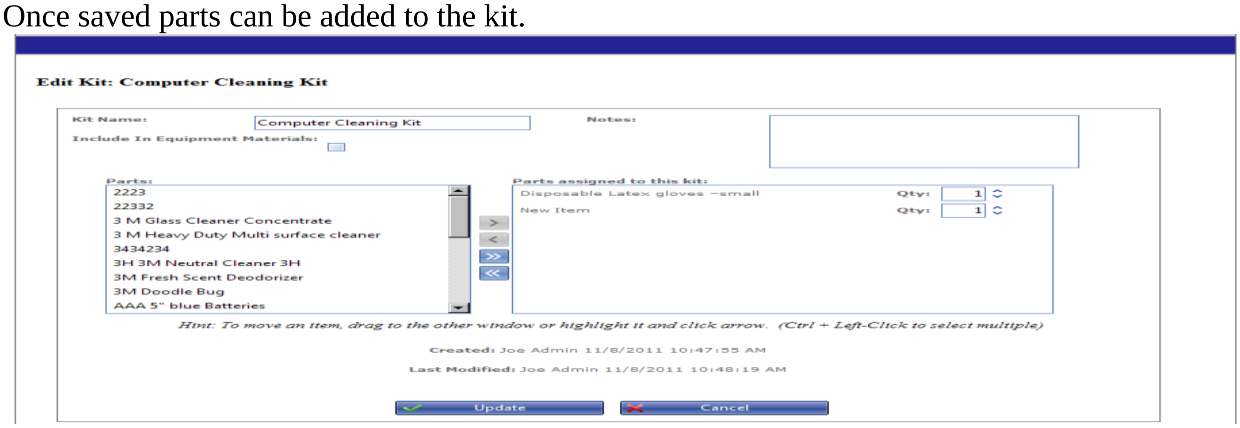



Figure 79 Inventory - Edit Kit

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.

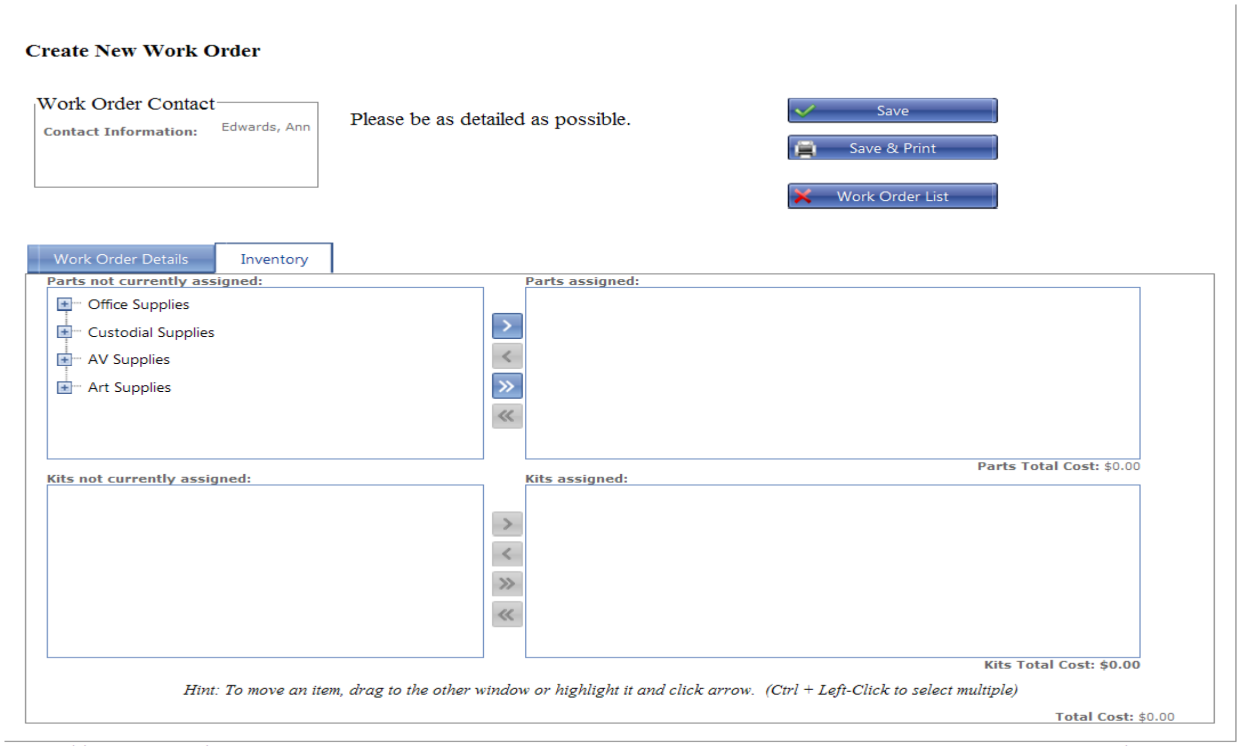



Figure 80-Inventory tab

### *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

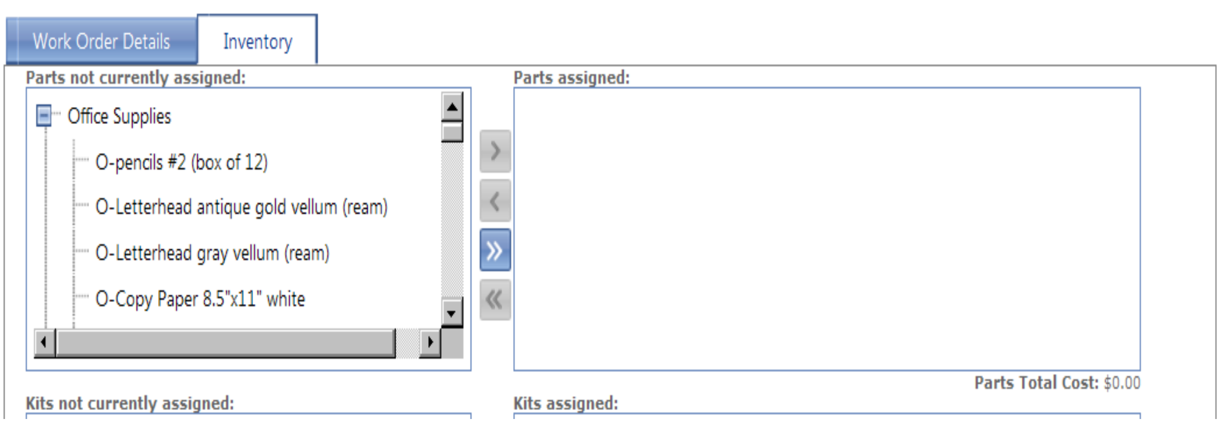



Figure 81-Inventory Category Expanded

### *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

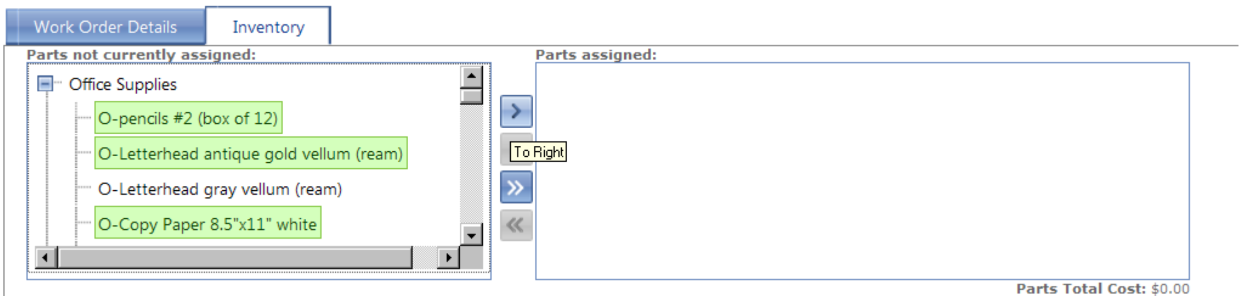



**Figure 82-Inventory Selected**

### *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.

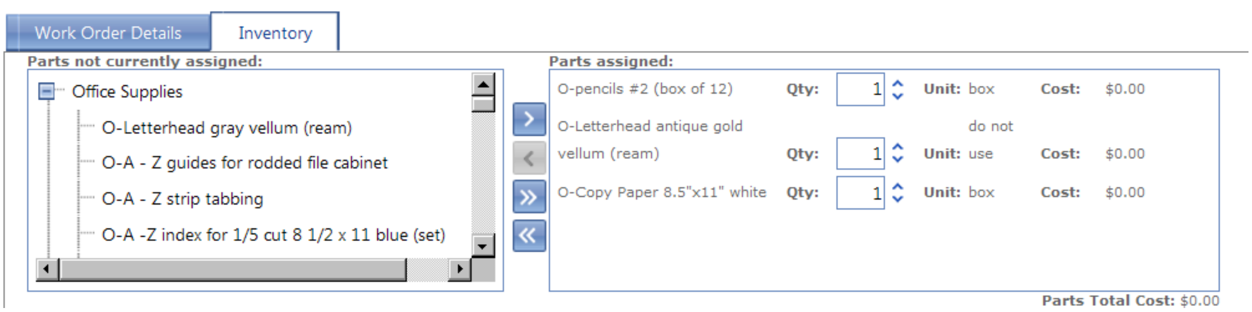



**Figure 83-Inventory Added**

### *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.

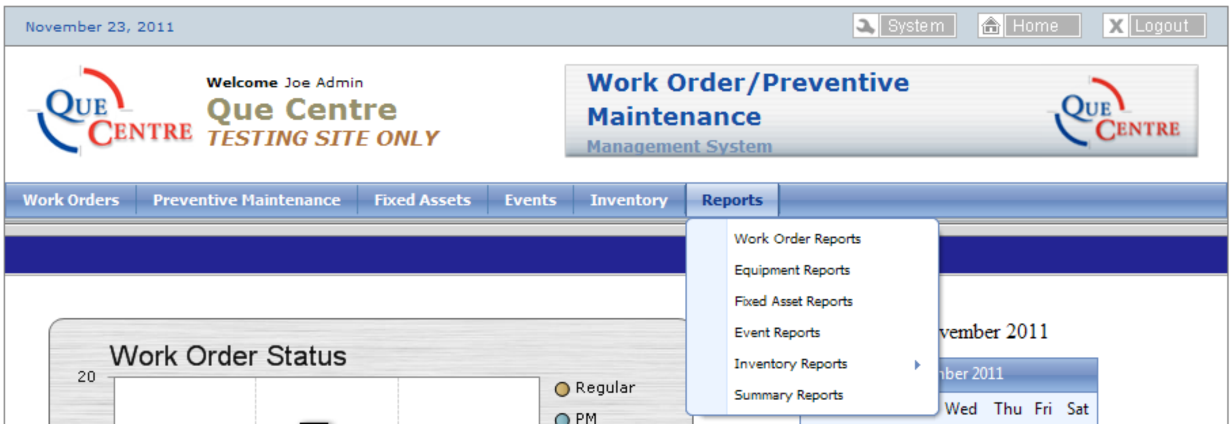



Figure 84 Reports – List Reports

## *Create New Report*

Click on Create New Report

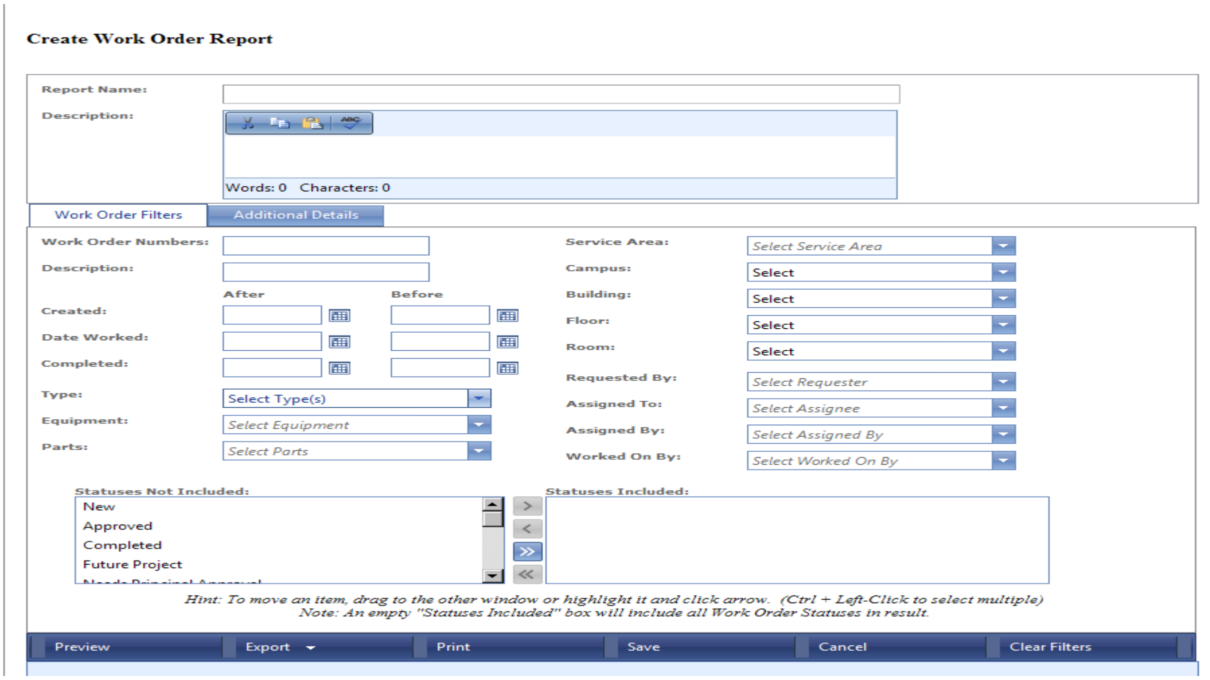



Figure 85 Reports - Create New Work Order Report

- 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.

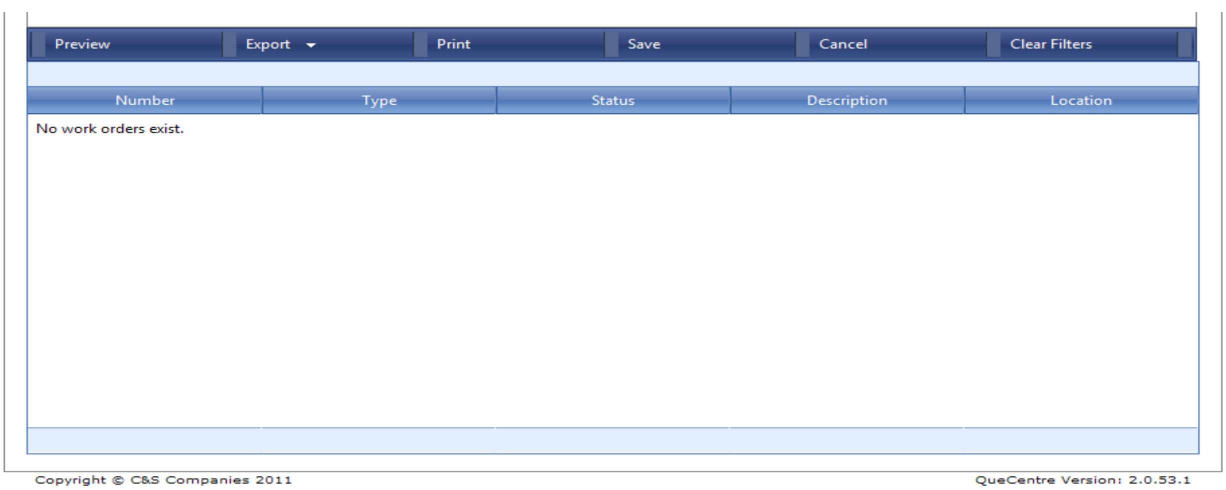



Figure 86 Reports Options

### *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.

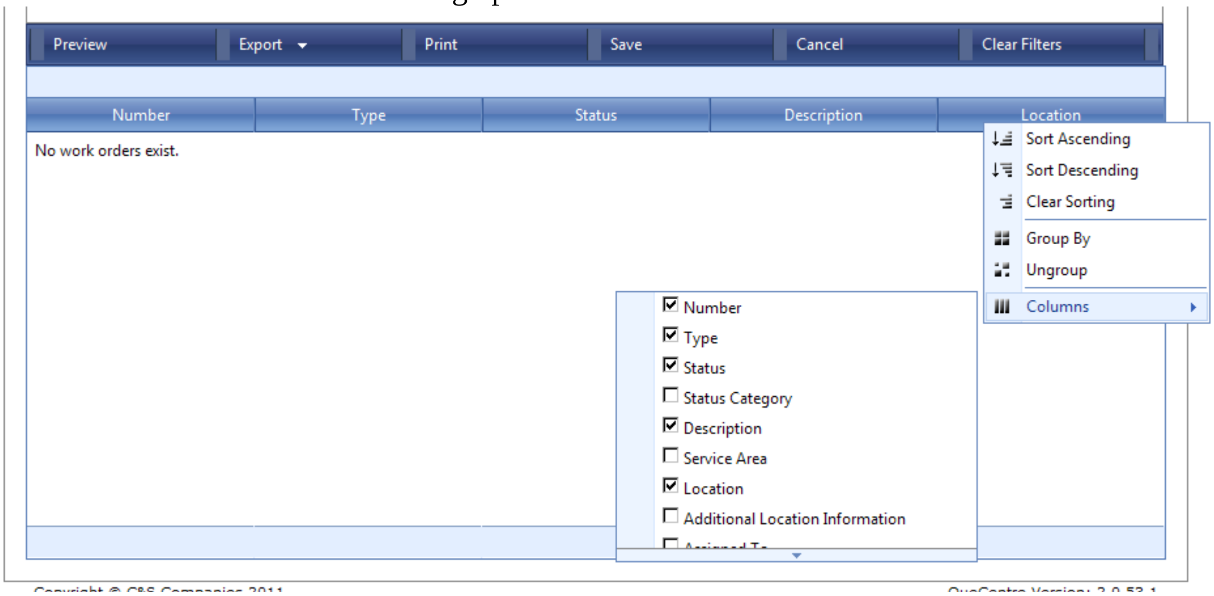



Figure 87 Reports - Column Headings

## 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.