



User Manual

TechEase

Daniel Ganter

Regina Raven

Michael McKeever

Nicholas Armocida

Jeremiah Washington

Table of Contents

1. **Introduction**
 - 1.1. System Requirements
 - 1.2. Account access quick reference
 - 1.3. System Help
2. **General Features**
 - 2.1. Accessing TEOS
 - 2.2. Log In
 - 2.3. Log Out
 - 2.4. Navigation Bar
 - 2.5. Settings Tab
 - 2.6. Reset Password
 - 2.6.1. Forgot Password
 - 2.6.2. Reset Password
3. **Administrator Account**
 - 3.1. Employees Tab
 - 3.1.1. Create New Employee
 - 3.1.2. View All Employees
 - 3.1.3. Employees Lookup
 - 3.1.4. Resetting Users Password
 - 3.1.5. Account Activation
 - 3.2. Work Orders
 - 3.2.1. Delete Work Orders
 - 3.3. Customers
 - 3.3.1. Customer Tab
 - 3.3.2. Create Customer
 - 3.3.3. View All Customers
 - 3.3.4. View Customer Detail
 - 3.3.5. Edit Customer Information
 - 3.3.6. Customer Status
 - 3.3.7. Search Customers
 - 3.3.8. Download Customers as CSV
 - 3.4. Jobs
 - 3.4.1. Access Jobs
 - 3.4.2. View Open Jobs
 - 3.4.3. Create New Job
 - 3.4.4. View Completed Jobs
 - 3.4.5. Job Detail
 - 3.4.6. Close Job
 - 3.4.7. Edit Job
 - 3.5. Timesheets
 - 3.5.1. View Pay Periods
 - 3.5.2. View Timesheets Within Pay Period
 - 3.5.3. Review & Approve Timesheets

- 3.6. Reports
 - 3.6.1. Payroll Reports
 - 3.6.2. Job Costing Report
 - 3.6.3. Work Order Report
- 3.7. Amazon Web Service
 - 3.7.1. Accessing Amazon Web Service
 - 3.7.2. Logging Into AWS
 - 3.7.3. Navigation AWS
 - 3.7.4. Troubleshooting
- 4. **Service Technician Account**
 - 4.1. Work Orders
 - 4.1.1. Creating Work Order
 - 4.1.1.1. Create New Customer
 - 4.1.1.2. Create Service Request
 - 4.1.2. Completing Work Order
 - 4.1.2.1. Time and Materials
 - 4.1.2.2. Work Information
 - 4.1.2.3. Confirm & Complete Work Order
 - 4.1.3. Download Work Order PDF
 - 4.1.4. Editing Signed Work Order
- 5. **Basic User Account**
 - 5.1. Navigating Timesheets
 - 5.1.1. Selecting Appropriate Pay Period
 - 5.1.2. Completing timesheet
 - 5.1.3. Submitting Timesheets
- 6. **Error Messages**

1. Introduction

The TechEase Organizational System (TEOS) is a customer relationship management application that will allow authorized users the ability to create customers, employees, service request, work orders, jobs and then send signed invoice receipts to the customer.

This user manual contains a detailed walkthrough of the functionality of TEOS. The sections will be organized with general features first then by user accounts types.

1.1. System Requirements

TEOS is design to function on any device with internet access that meeting the minimum system requirements:

Operating System Requirements	Microsoft Windows MacOS iOS Android Chrome OS Linux
Browser Requirements	Internet Explorer Chrome Firefox Safari
Application Requirements	PDF reader

1.2. Account Access Quick Reference

The following is a reference to that shows what features are accessible by the account types

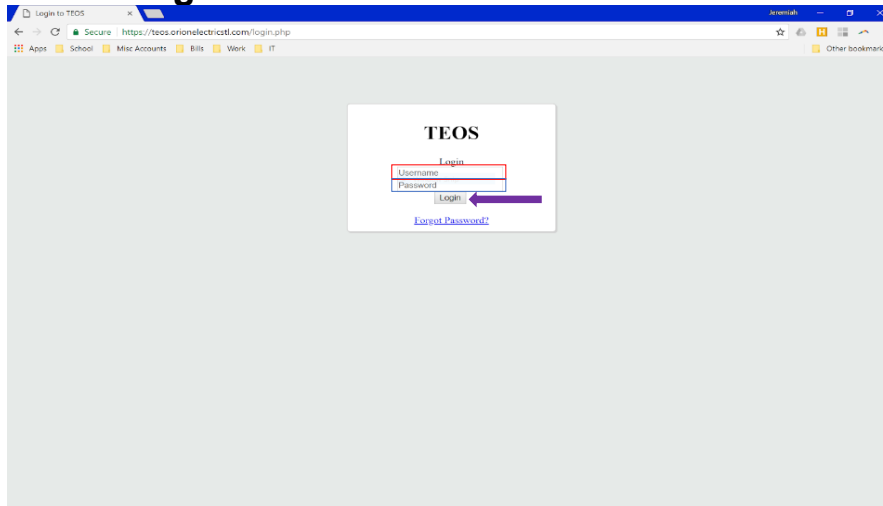
System Features	Basic	Service Technician	Administrator
Sign in/out	X	X	X
Employees Section			X
Create Employees			X
Reset User Password	X	X	X
Delete Employees			X
Timesheet Section	X	X	X
Submit Timesheet	X	X	X
Approve Timesheet			X
View Jobs			X
Create Jobs			X
Close Jobs			X
Customer Section			X
Create Customer		X	X
Manage Customer			X
Activate/Deactivate Customer			X
Export Customer			X
Create New Service Request		X	X
Work Orders Section		X	X
View Completed Orders		X	X
Create New Service Request		X	X
Delete Work Order			X
Submit Work Order		X	X

2. General Features

2.1 Accessing TEO

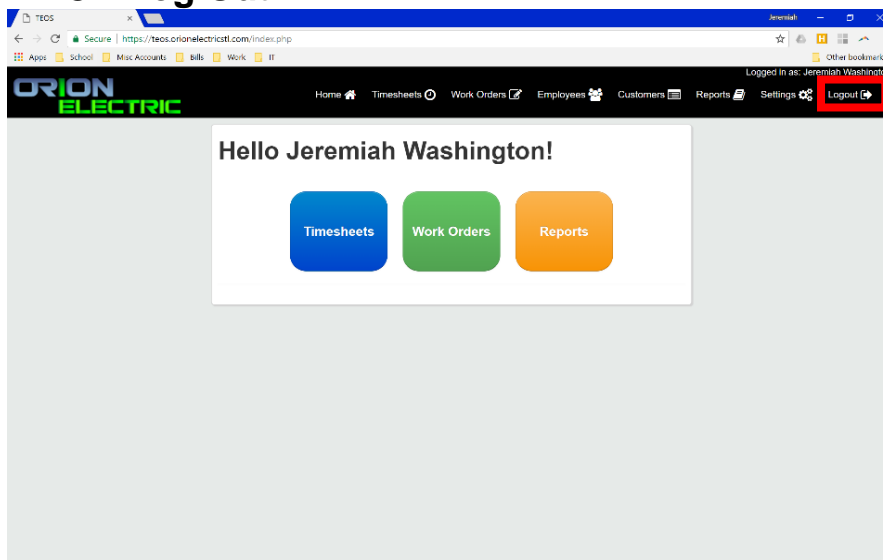
To access the TEOS website for logging in, it's recommended that you use the latest version of Google Chrome. Once you open your internet browser, enter this address in the search bar "<https://teos.orionelectricstl.com/login.php>" then press enter. The will take you to the TEOS log-in page. If this is your first time logging in, your initial password will be send to the email associated with you "Employee" account upon its creation.

2.2 Log In



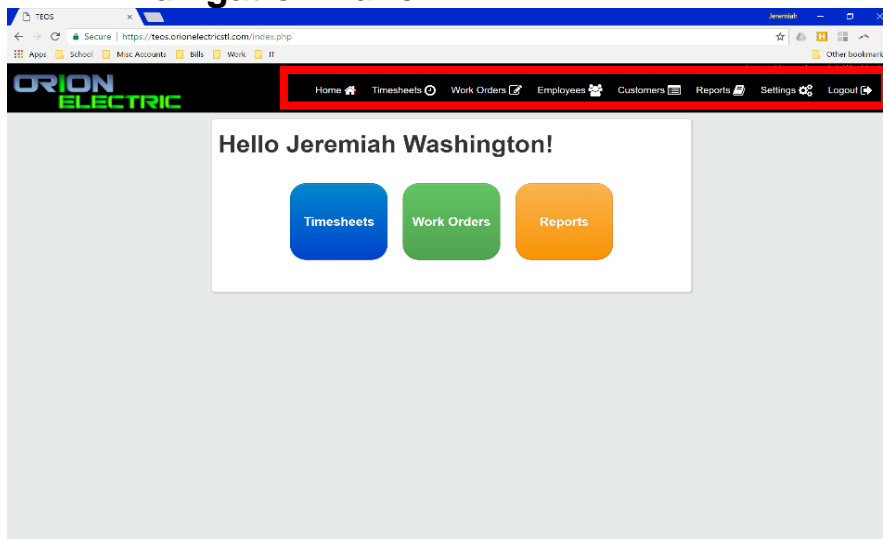
1. Enter your assigned username in the **username** field.
2. Enter your assigned password in the **password** field.
3. Click **Login**.

2.3 Log Out



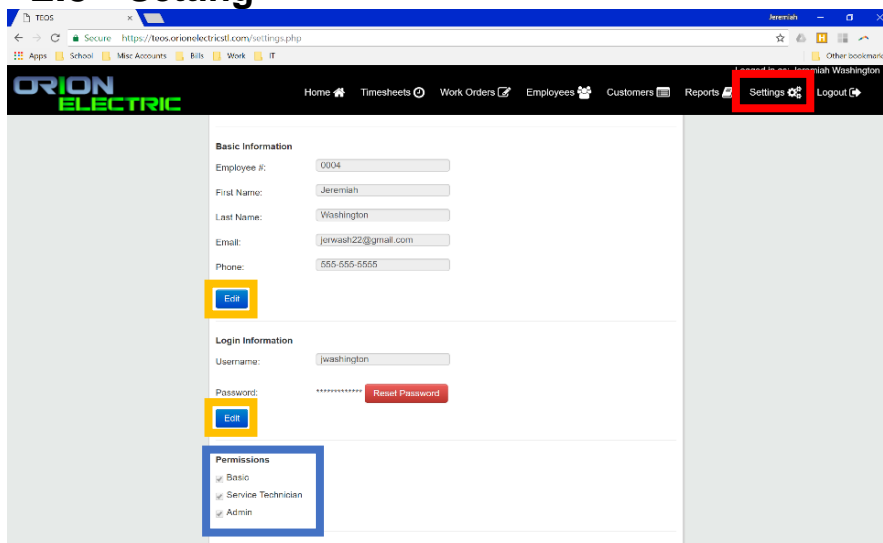
1. Click "**Logout**" located on the navigation bar to exit the program.

2.4 Navigation Panel



1. The **navigation panel** allows the user to quickly move throughout the system.
2. Clicking on a particular section will take you to the main page of that section.
3. The navigation bar is always visible for convenience. Also, only users authorized to access a section, will see that section in the navigation Panel.

2.5 Setting



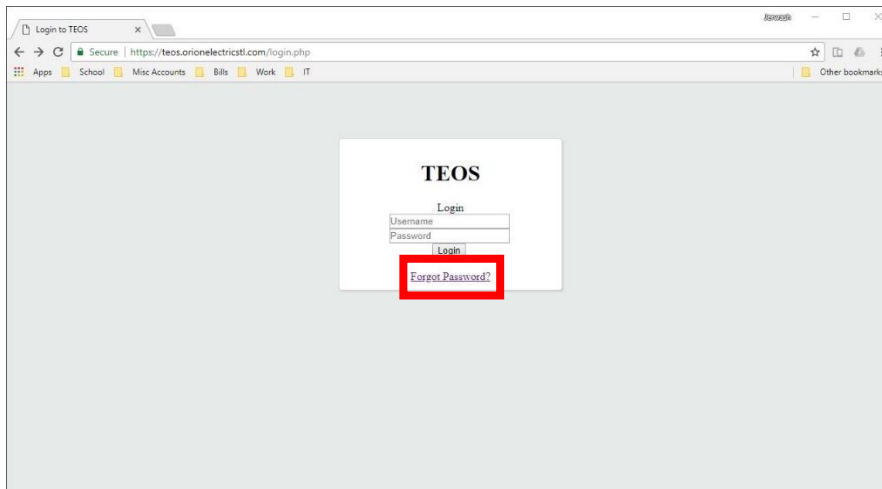
Note: Users can't change their own Employee #, first and last name or account type.

1. The "Setting" section displays basic user information and account type.
2. Administrators have the ability to edit all information within the setting except their own **permissions**.
3. To edit information, click the **"Edit"** button in the respective area, modify the information then click save when the editing is completed.

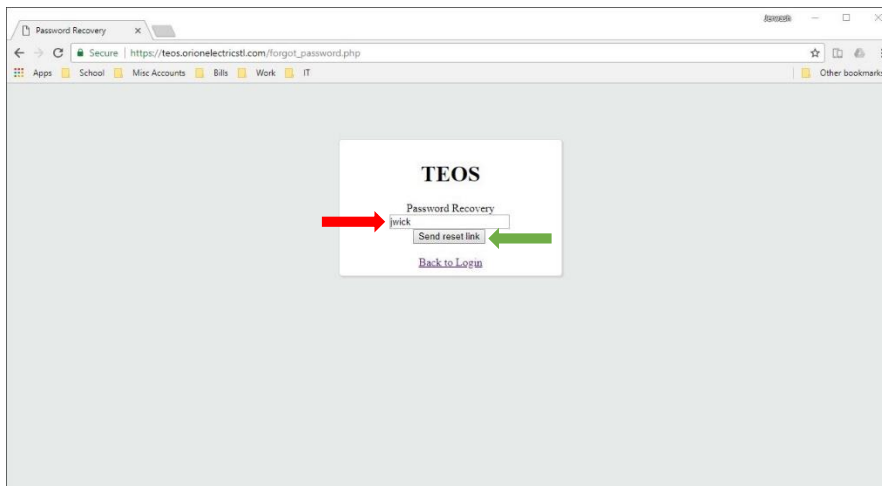
2.6 Resetting Password

There are two ways to reset your password. One is from within TEOS on the Settings page and the other is from the Log-In page. Continues reading this section for detail instructions.

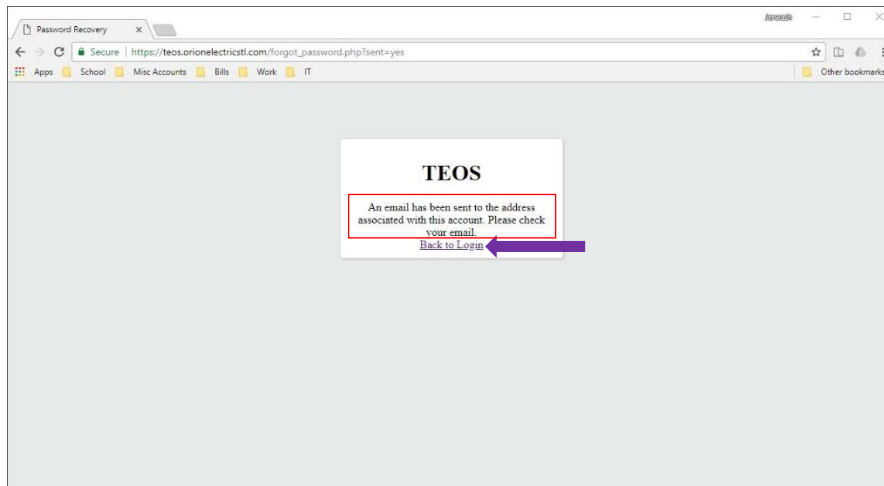
2.6.1. Forgot Password



1. If you have forgotten your password, navigate to the TEOS login webpage.
2. Click the “**Forgot Password**” link to continue.

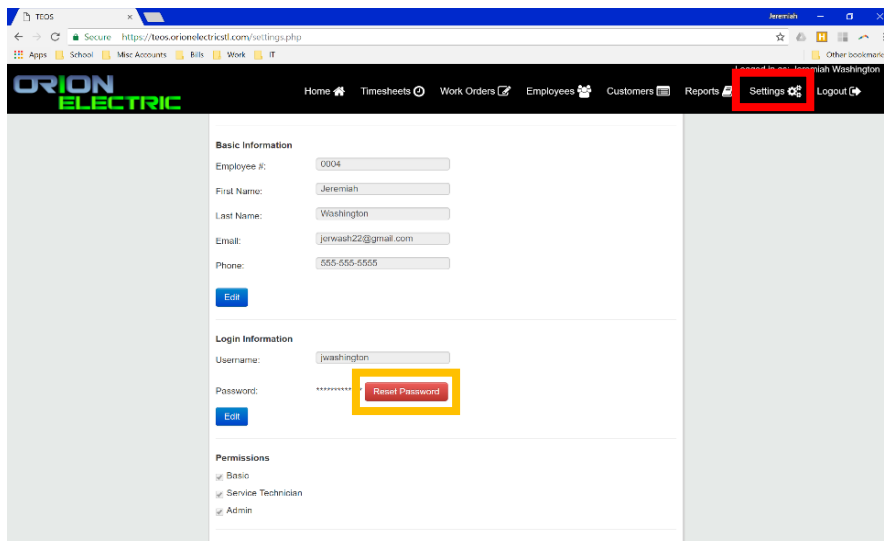


3. Click on the empty **text field** and enter your username
4. Click “**Send Reset Link**”.



5. A **confirmation** will appear that an email has been sent to the user's associative email.
6. Click the "**Back to Login**" link to return to the login screen.

2.6.2. Reset Password



1. To change a user's password from within TEOS, navigate to the **Setting** page.
2. Click the "**Reset Password**" link

The screenshot shows a web browser window with the URL https://teos.orionelectricatl.com/reset_password.php. The page title is "Jeremiah Washington - Reset Password". The form contains three input fields: "Old Password", "New Password", and "Retype New Password". Below these fields is a blue button labeled "Change Password" and a link labeled "Return to Settings". Colored arrows point to each field: a red arrow for "Old Password", a green arrow for "New Password", and another green arrow for "Retype New Password". A purple arrow points to the "Change Password" button.

3. Enter your **old Password**
4. Enter your **new Password**
5. Retype your **new Password**
6. Click the **"Change Password"** button to finalize the changes.

The screenshot shows the same web browser window after the password reset. The page title is "Password has been reset!". Below the title is a link labeled "Return to Settings", which is highlighted with a red rectangular box.

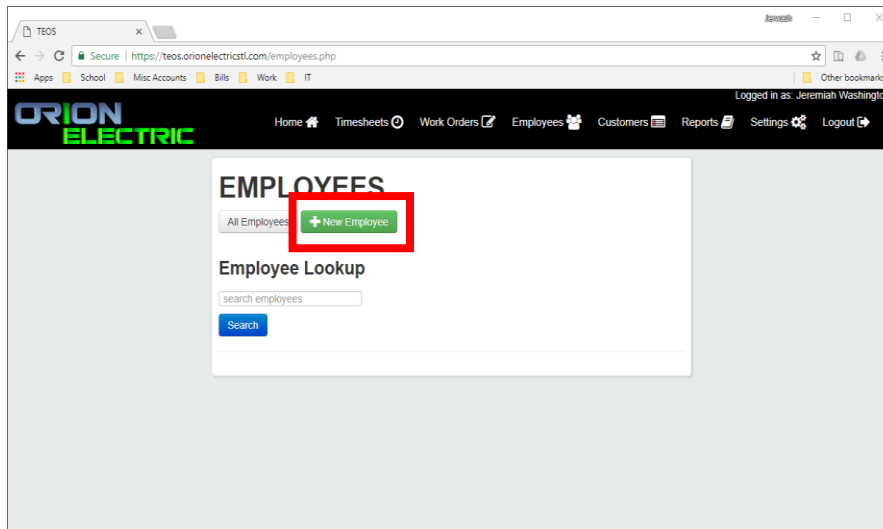
7. A confirmation will appear.
8. Click the **"Return to Setting"** button to return to the Setting main page.

3. Administrator Account

Administrator accounts have the highest access within TEOS. They have the ability to create employees, customer, work orders, jobs and modify timesheets. This section will provide a walkthrough of all the administrator functions.

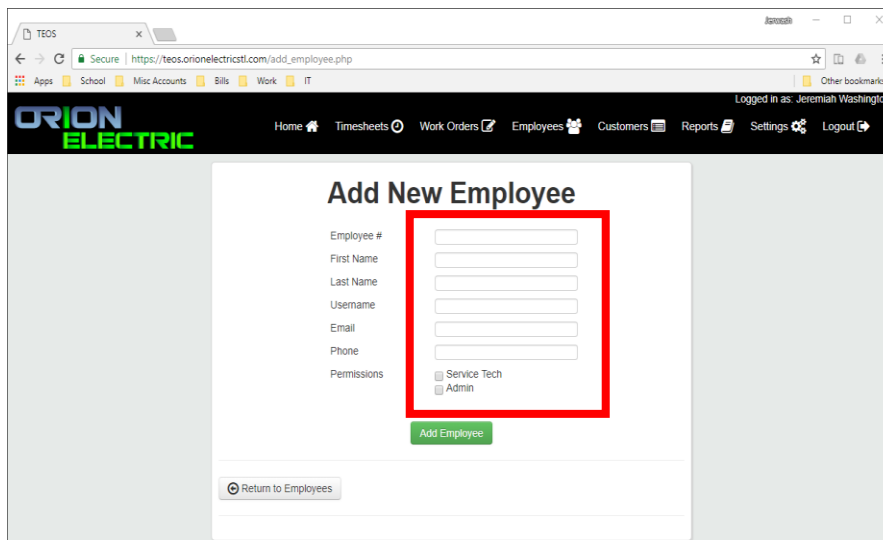
3.1 Employees Section

3.1.1. Create New Employees



1. Click on the Employees section to access the employees home page.

2. Click on the button label “New Employee”.



3. Enter a **unique** Employee number. This number is used to identify the employee within TEOS.

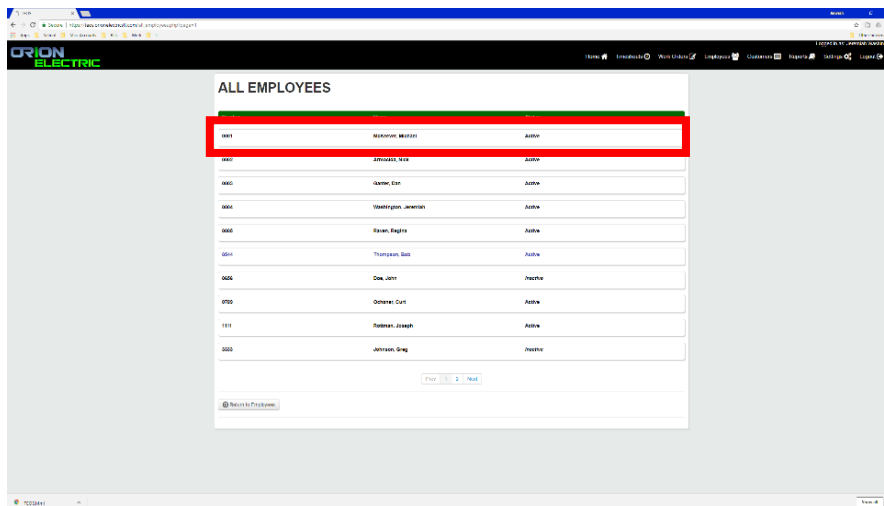
4. Complete the remaining form while also providing a **unique** username. This username will be how the employee logs into TEOS ([See Section 2.2](#)).

5. Select whether the new employee is a Service Tech, Admin or both. Selecting neither will grant account “Basic” permission. This will grant permissions to the user to access and modify certain information.

6. Click “Add Employee” to finalize the entry.

3.1.2. View All Employees

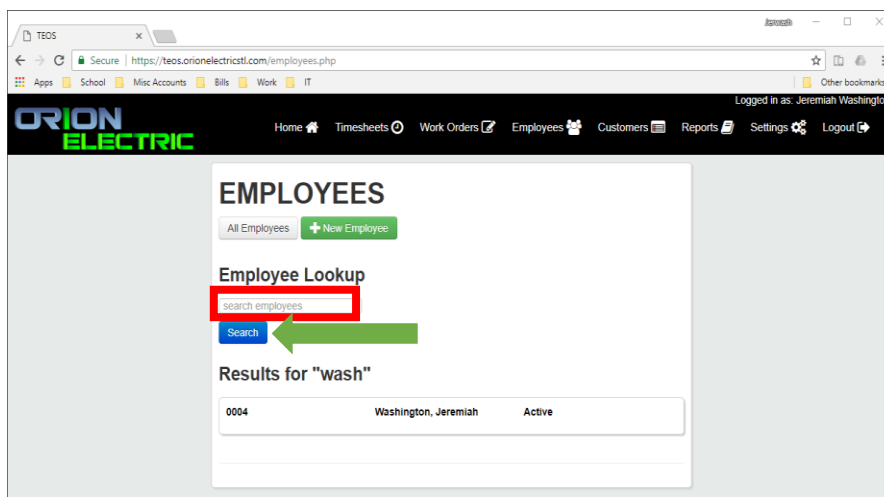
1. To view all Employees, click on the “All Employees” button.



2. Select an employee by clicking anywhere within the **enclosed employee box**.

3. To view more Employees, click next or the page number located at the bottom of the webpage.

3.1.3. Employees Lookup



1. TEOS allows for the **search of employee** from within the Employees section.

2. To search for employees, enter "last name, first name" or part of the last name or first name and click **"Search"**.

3. Do not enter the First and Last, the function will fail.

3.1.4. Resetting Users Password

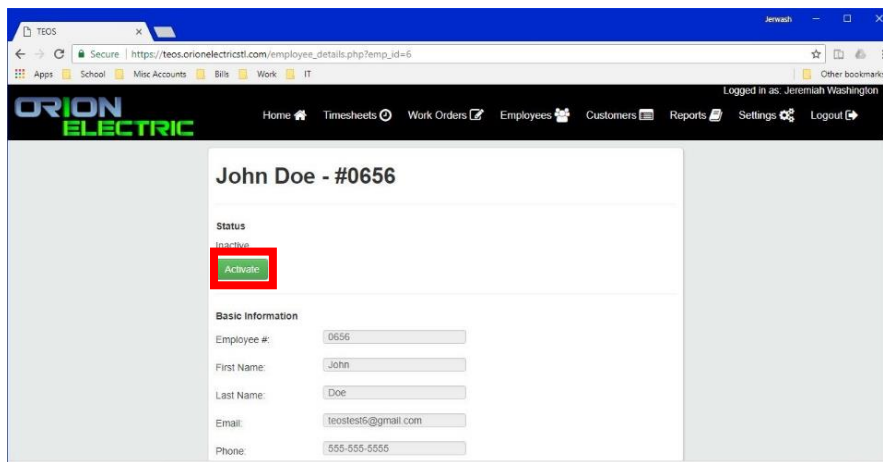
The screenshot shows the Orion Electric user management interface. The 'Basic Information' section includes fields for Employee ID (0004), First Name (Jeremiah), Last Name (Washington), Email (jorwah22@gmail.com), and Phone (555-555-5555). The 'Login Information' section includes a Username field (jorwah22) and a Password field. A red box highlights the 'Reset Password' button next to the password field. The 'Permissions' section shows checkboxes for Basic, Service Technician, and Admin, all of which are checked.

1. As an Admin, to reset and employee's password, go to the employees record and click **"Reset Password"**.

The screenshot shows the 'Jeremiah Washington - Reset Password' form. It includes three input fields: 'Old Password' (highlighted with a red border), 'New Password' (highlighted with a blue border), and 'Retype New Password' (highlighted with a yellow border). A green arrow points to the 'Change Password' button. Below the form is a 'Return to Employee Details' button.

2. Enter the **old password**.
3. Then enter the **new password**.
4. **Retype the new password** then click **"Change Password"**

3.1.5. Account Activation

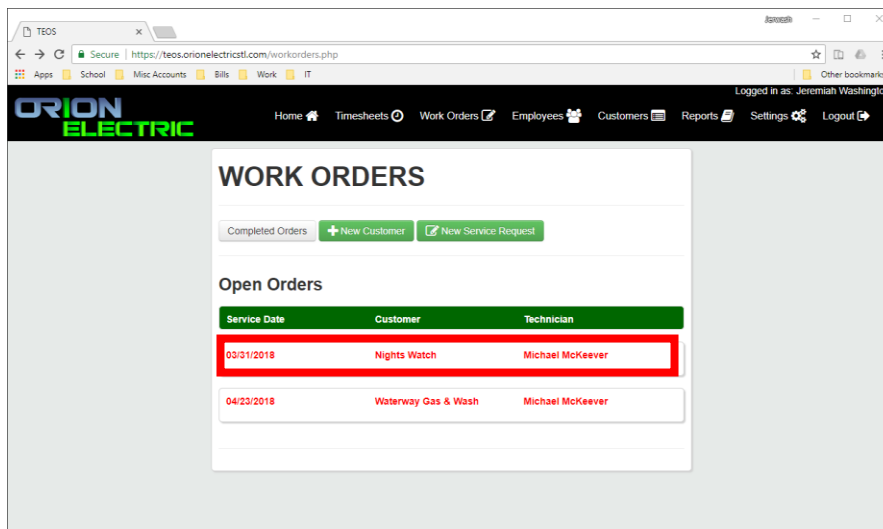


1. To **Activate** or **Deactivate** and employee account select the employees record then click the button marked “Activate” or “Deactivate”.

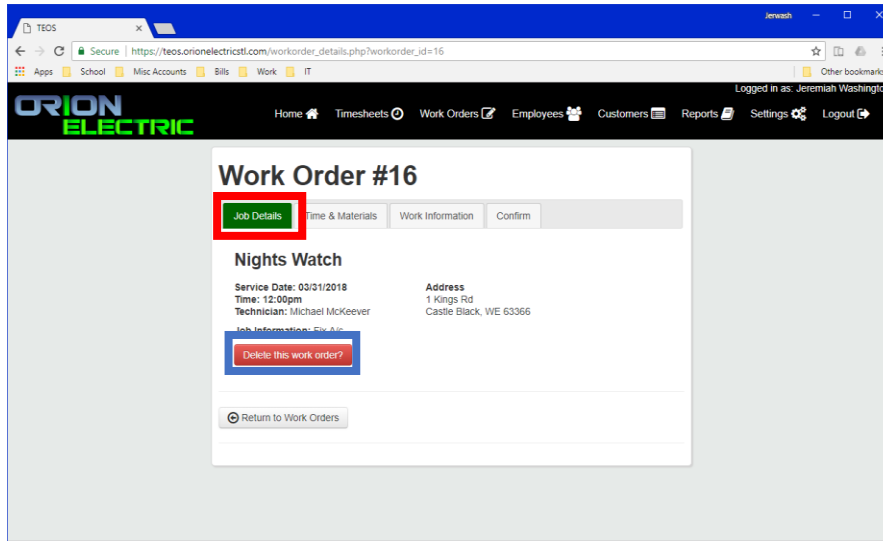
Note: Employees can’t be permanently deleted, however they can be deactivated thus having all their access privileges revoked.

3.2. Work Orders

3.2.1. Delete Work Orders



1. To delete a Work Order, select an **open record** from the open orders view.

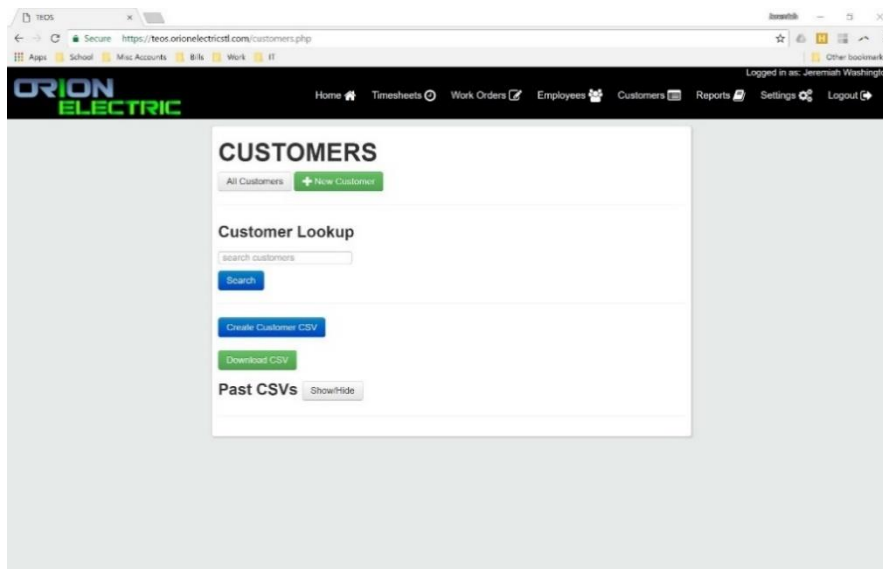


2. In the **Job Details** tab, click the “Delete this work order?” button.
3. You will be prompted to confirm that you’re about to delete a work order. Click “ok” to confirm the deletion.

3.3. Customers

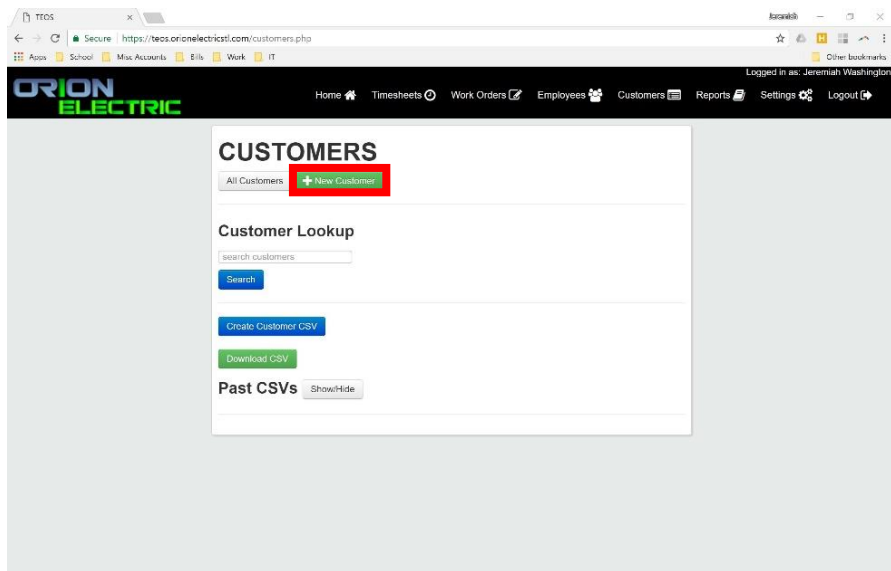
The “Customers” section contains information about clients that have been added to the TEOS program. Administrators are the only users that have the power to deactivate or otherwise modify any customers.

3.3.1 Customer Section

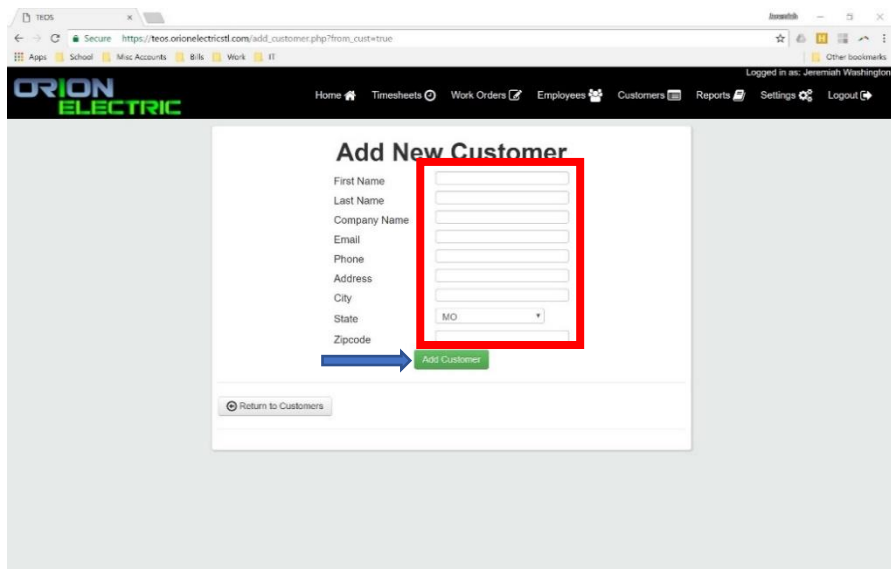


1. This is the main screen of the Customer section. From here, those with proper access can see all the customers, create new customers, search for customers with the database and download a list of current customers.

3.3.2 Create New Customer



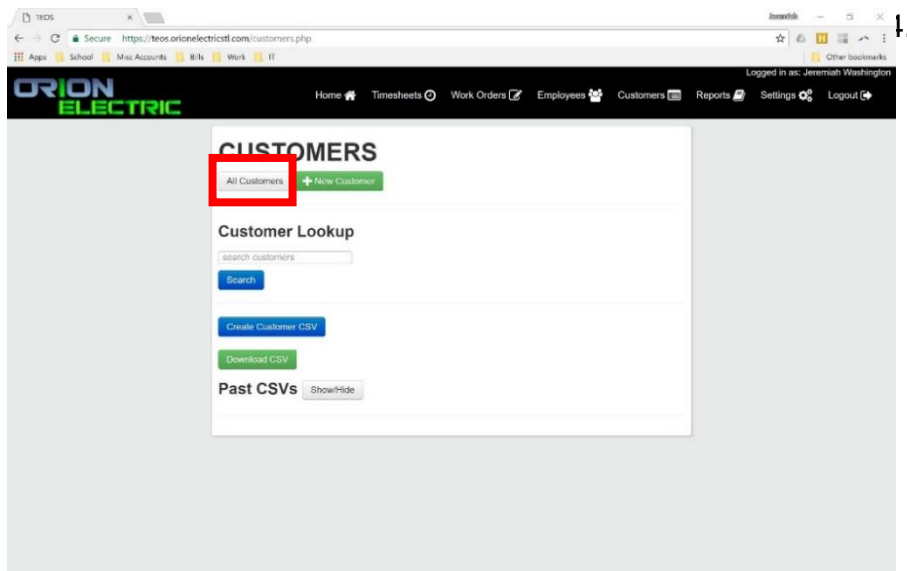
1. To create a new Customer, first click on the “**New Customer**” button.



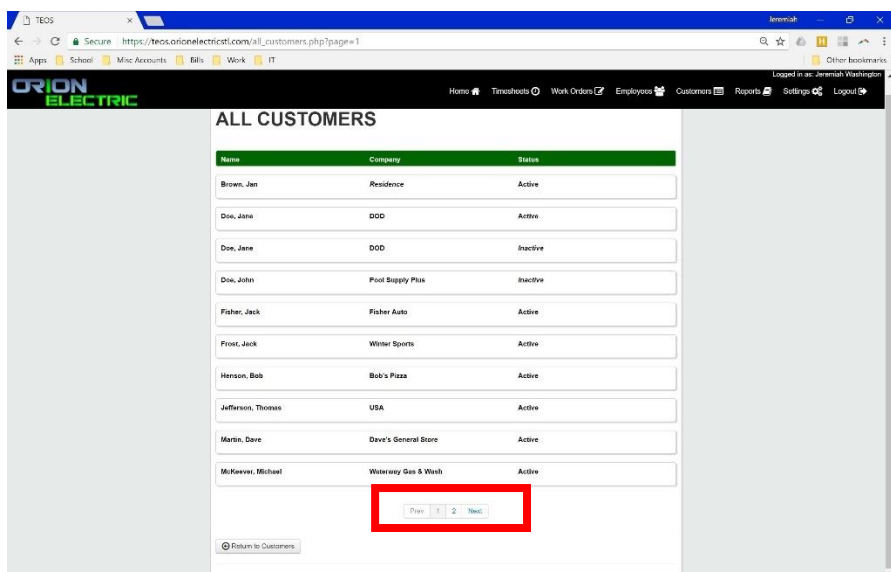
2. Accurately fill out the **all fields**.
3. Click “**Add Customer**” once all the fields are completed.

Note: If this is a **residential** customer, do not input a company name.

3.3.3 View All Customers

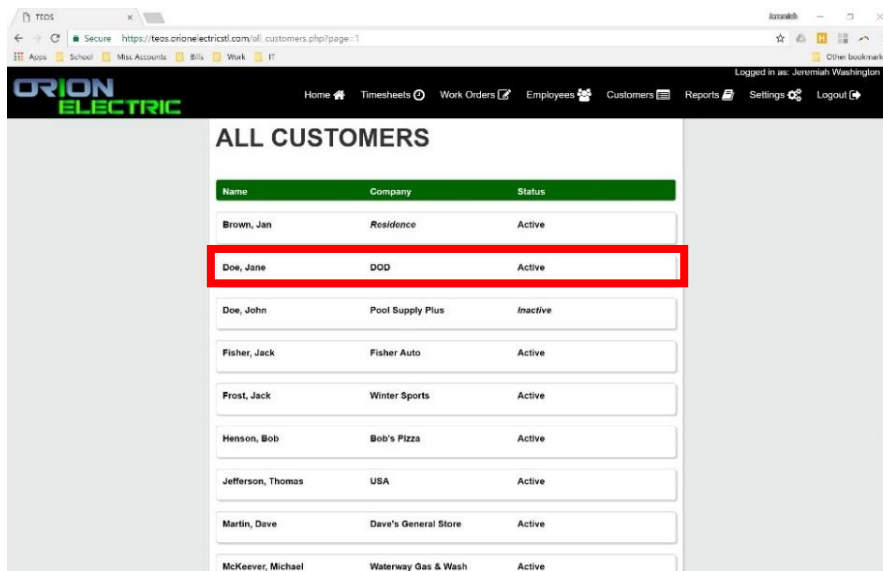


To view all Customers, click on the “All Customers” button.



5. All Customers will be viewed in alphabetical order by default.
6. Click the “Next” button or number located at the bottom of the page to advance through the list of customers.

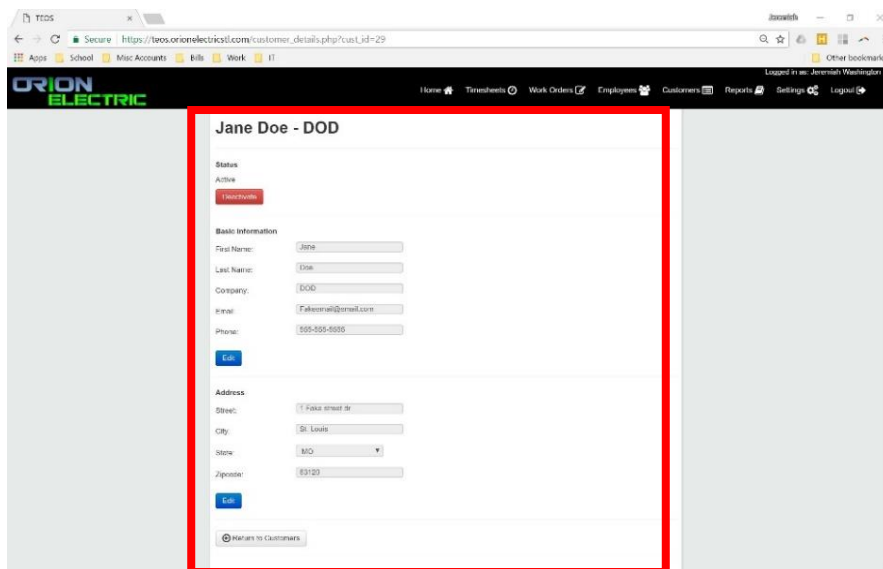
3.3.4 View Customer Details



The screenshot shows the Orion Electric web application interface. The top navigation bar includes links for Home, Timesheets, Work Orders, Employees, Customers, Reports, Settings, and Logout. The main content area is titled 'ALL CUSTOMERS' and displays a table of customer records. A red rectangular box highlights the record for Jane Doe, DOD, Active.

Name	Company	Status
Brown, Jan	Residence	Active
Doe, Jane	DOD	Active
Doe, John	Pool Supply Plus	Inactive
Fisher, Jack	Fisher Auto	Active
Frost, Jack	Winter Sports	Active
Henson, Bob	Bob's Pizza	Active
Jefferson, Thomas	USA	Active
Martin, Dave	Dave's General Store	Active
McKeever, Michael	Waterway Gas & Wash	Active

1. To view customer details such as, email, phone number, or address, select the desired customer's record from the "All Customer" view or a "Customer Lookup" ([See Section 3.3.7](#)).



The screenshot shows the Orion Electric web application interface with the 'Jane Doe - DOD' customer detail page. A red rectangular box highlights the form fields. The form includes sections for Status, Basic Information, and Address.

Jane Doe - DOD

Status: Active
[Deactivate](#)

Basic Information

First Name:
Last Name:
Company:
Email:
Phone:
[Edit](#)

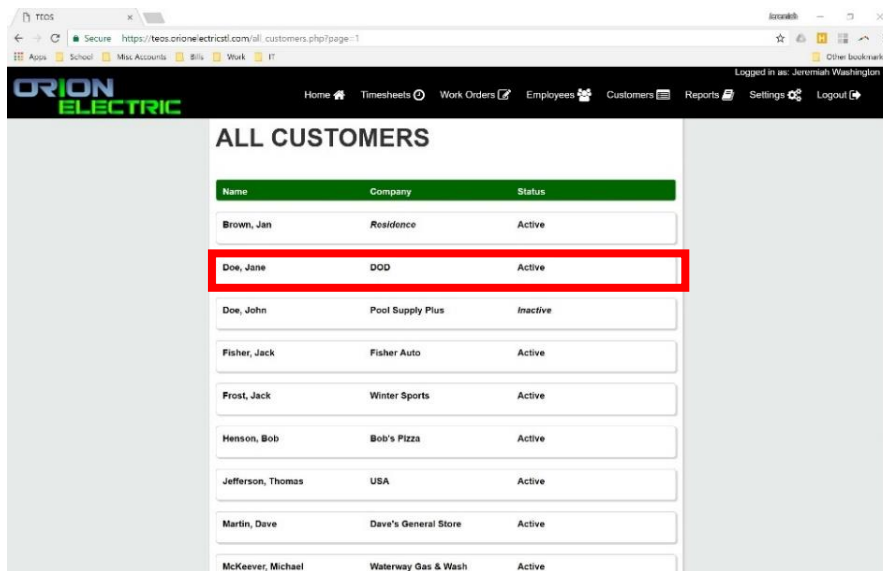
Address

Street:
City:
State:
Zipcode:
[Edit](#)

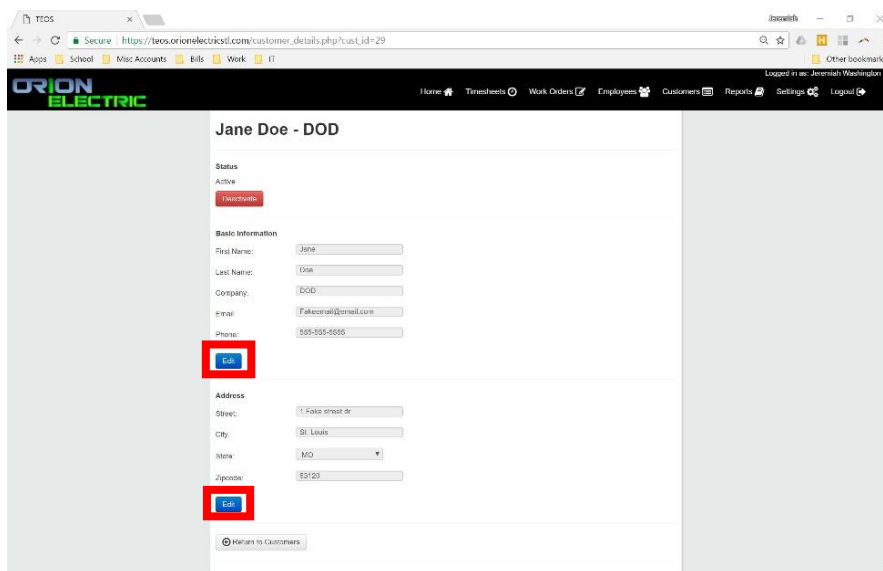
[Return to Customers](#)

2. Once the desired record is selected, the Customer detail page will be displayed, showing various information you've saved about the customer.

3.3.5 Edit Customer Information



1. To edit customer information, select the desired customer's record from the "All Customer" view or a "Customer Lookup" ([See Section 3.3.7](#)).



2. The customers record will then be displayed.
3. To edit information, click the "Edit" button to allowed the fields to be modified.
4. Once the changes are made click the "Save" button that appears in the place of the "Edit" button.

3.3.6 Customer Status

Note: Customers who have open Work Orders, **cannot** be set to “Inactive”. The Work Order must be completed first ([See Section 4.1.1.5](#)).

1. A customer’s status is a very important feature within the TEOS program.
2. A Customer’s status indicates whether that customer is “Active” or “Inactive”.
3. Only “**Active**” customers can be added to Work Orders.
4. To change a customer’s status, click the button labeled “Inactive” or “Active”.

3.3.7 Search for Customer

1. To search for customer, first click on the “Customers” tab to access its main page.

CUSTOMERS

All Customers [+ New Customer](#)

Customer Lookup

[Search](#)

[Create Customer CSV](#)

Past CSVs [Show/Hide](#)

- Next, enter either a part of the customer's name such as "Ja", "J", or "Jane" and click "Search". You may also search by "Last, Name, First Name". For example: "Doe, Jane".

Note: When using customer look up, if you know the customer's full name, search by either the first name or the last name not both. The system will not return a search such as, "Jane Doe"

CUSTOMERS

All Customers [+ New Customer](#)

Customer Lookup

[Search](#)

Results for "Jane"

Name	DOB	Active
Doe, Jane	DOB	Active

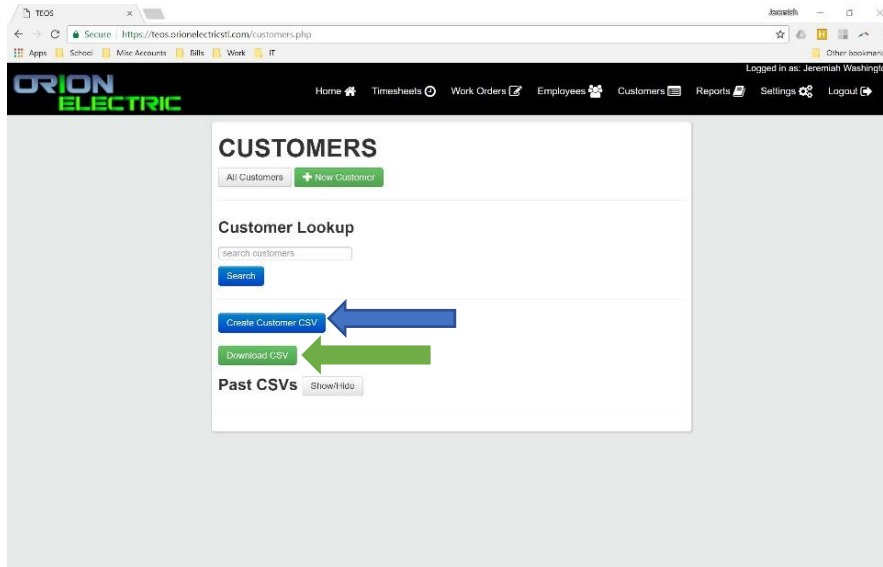
[Create Customer CSV](#)

Past CSVs [Show/Hide](#)

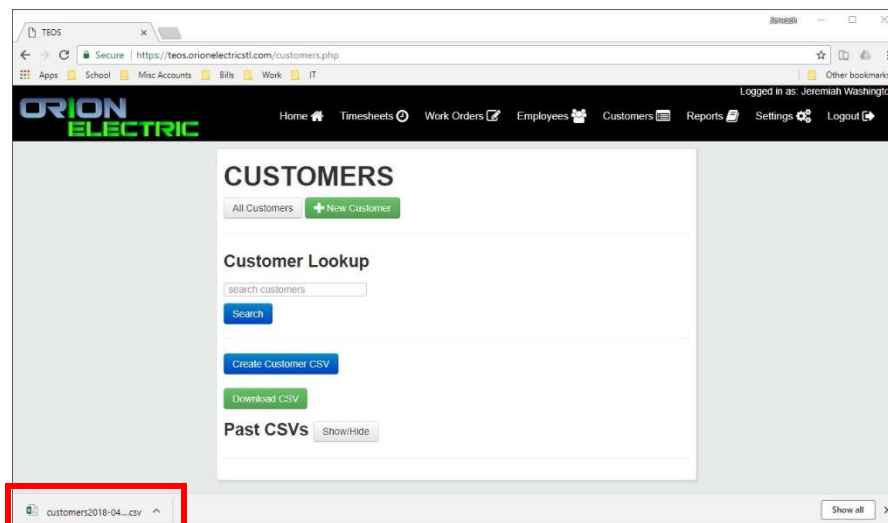
- The results will show the records that either exactly or partially match your search word.

3.3.8 Download Customers as CSV

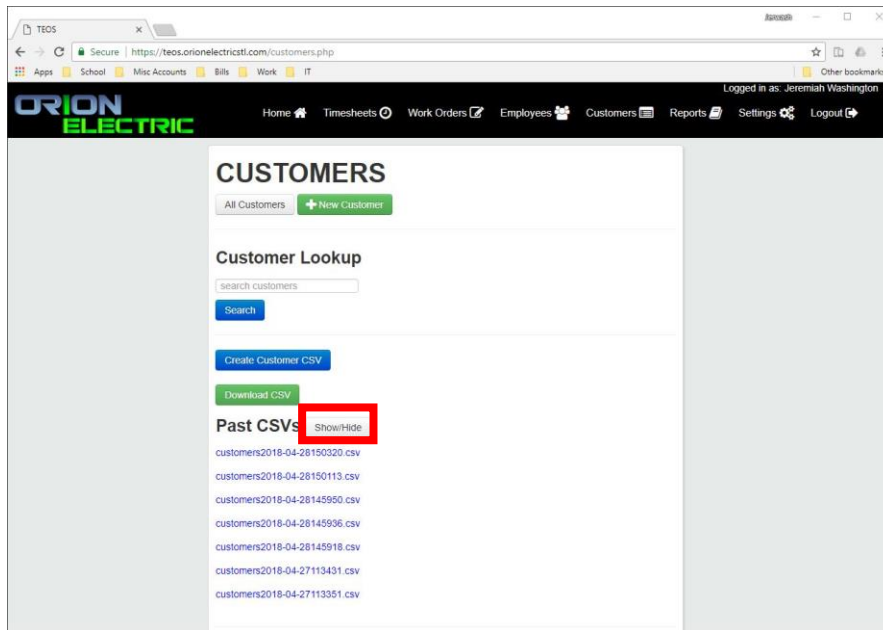
This feature exports a .csv file containing all customers added to TEOS since the last download. The purpose of this feature is to allow for a continuous and non-duplication of customers to be upload to other programs.



1. To download a .csv file, click on the customer's section.
2. Then click on "Create Customer CSV".
3. Once you've click on "Create Customer CSV", another button will appear labeled "Download CSV"



4. When you click on "Download CSV" the download will automatically begin downloading to your computer, saving it with a unique data and time stamp.

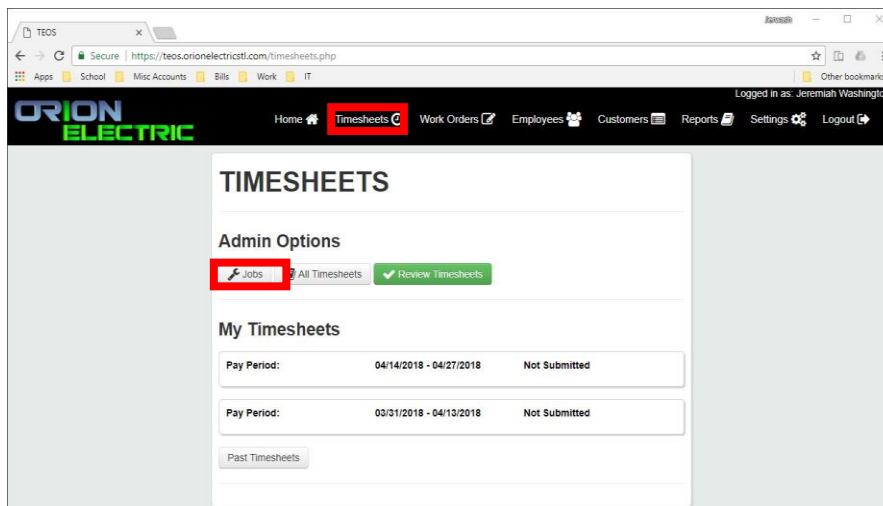


5. To download past .csv, click the “Show/Hide” button, then click on the desire file, using the date and time to identify the files.

3.4 Jobs

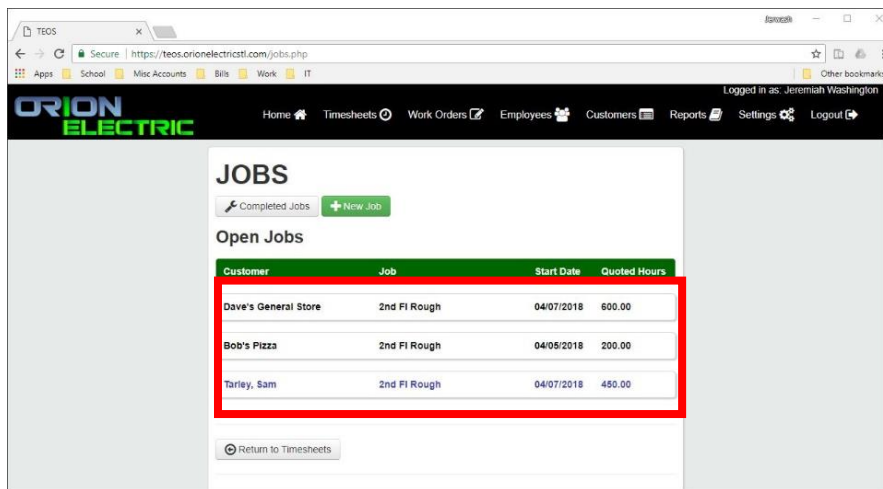
The Job function allows particular project to be attached to Customer records for the purpose of assessing job cost.

3.4.1. Access Jobs



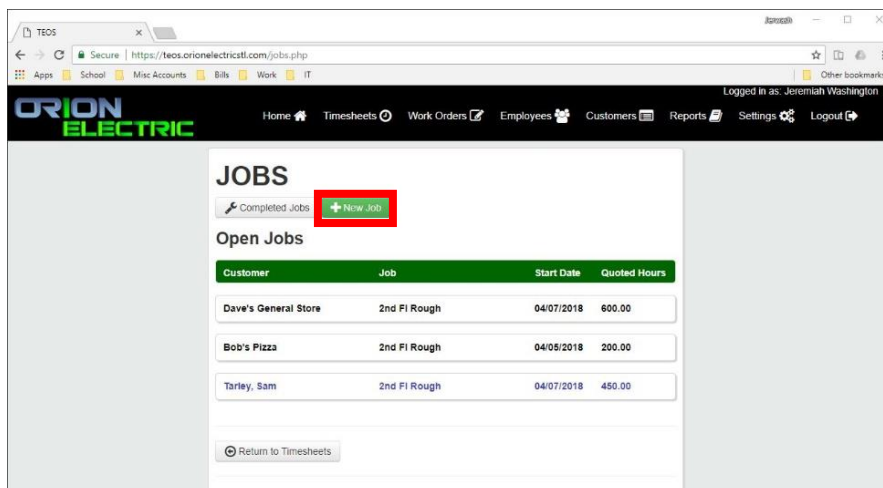
1. To access Job, click on the Timesheets section, then click on the “Jobs” button

3.4.2. View Open Jobs



1. Completing the steps in [Section 3.1.4](#) will display the main "Jobs" page.
2. On this page, you will see a list of all Jobs currently open.

3.4.3. Create New Job



1. To create a job, click on the "New Job" button from the Jobs, main page ([See Section 3.4.1](#)).

TEOS

Secure | https://teos.orionelectricstl.com/add_job.php

ORION ELECTRIC

Home Timesheets Work Orders Employees Customers Reports Settings Logout

Logged in as: Jeremiah Washington

Add New Job

Customer: Select a customer OR + New Customer

Job Name:

Start Date:

Quoted Hours:

Add Job

Return to Jobs

2. Once you've accessed the "Add New Job Page", complete the field as accurately as possible.

3. This job will be linked to a Customer within TEOS. If the Customer doesn't exist, refer to [Section 3.3.2](#) for instructions on how to "Create a New Customer".

4. If the Customer does exist, select the customer from dropdown menu.

5. Enter a unique job name to identify the project.

6. Select a Start Date for the job

7. Enter quotes hours until completion of the job.

8. Once **all fields** are completed, click "Add Job" to finalized the entry.

TEOS

Secure | https://teos.orionelectricstl.com/add_job.php

ORION ELECTRIC

Home Timesheets Work Orders Employees Customers Reports Settings Logout

Logged in as: Jeremiah Washington

Add New Job

Customer: Select a customer OR + New Customer

Job Name:

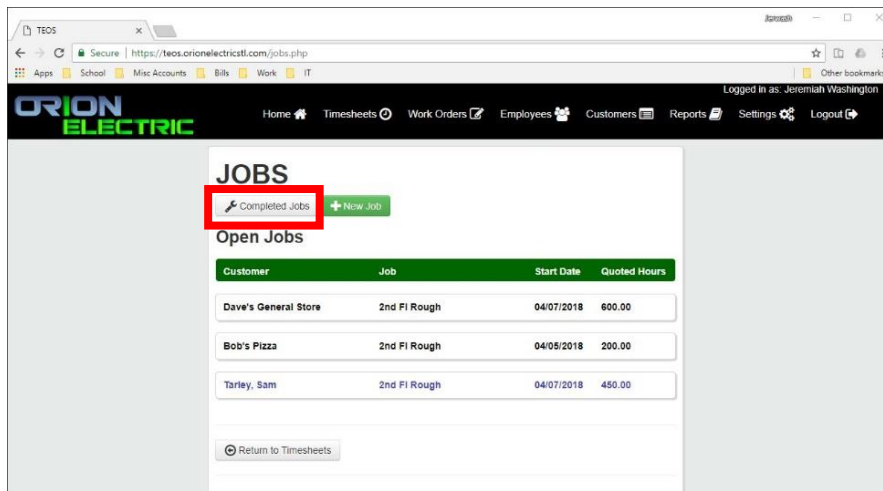
Start Date:

Quoted Hours:

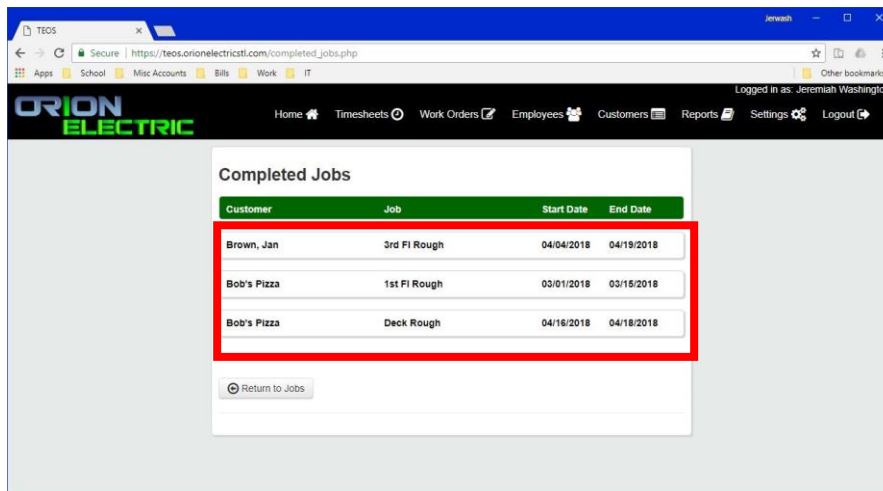
Add Job

Return to Jobs

3.4.4. View Completed Jobs

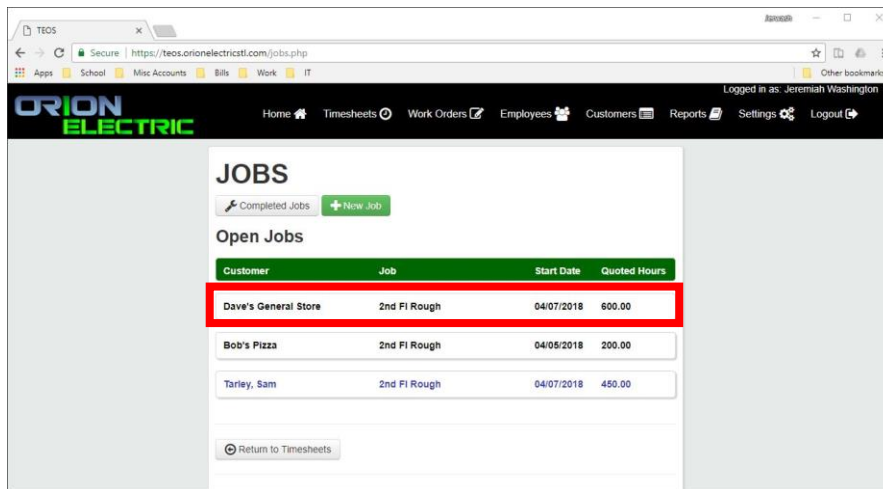


1. To view completed jobs, go to the jobs main page and click "Completed Jobs".



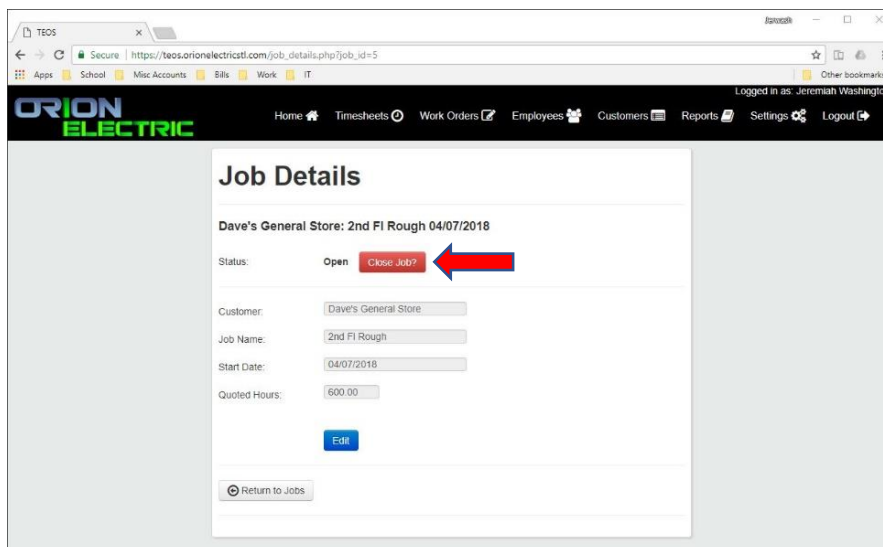
2. The Complete Jobs page will list Job that have been completed, meaning, they have been closed and an "End Date" has been assigned. [See Section 3.4.5](#) for instructions on how to close a job.

3.4.5. Close Job



1. To close a job, first navigate to the “Open Jobs” main page ([See Section 3.4.2](#)).

2. Once on the Jobs main page, select any record to display the details of that record.



3. Once on the “Job Details” page, click the “Close Job”

Note: Once a job is closed, it can not be reopened. All other information however can be edited after a job closer. [See Section 3.4.6](#) on instructions on how to edit Jobs.

Job Details

Dave's General Store: 2nd FI Rough 04/07/2018

Status: Open

End Date: 04/28/2018

Complete Job

Customer: Dave's General Store

Job Name: 2nd FI Rough

Start Date: 04/07/2018

Quoted Hours: 600.00

Edit

Return to Jobs

- After you clicked the "Closed Job" button enter an "End Date"
- Then click "Complete Job" to finalize the closure.

3.4.6. Edit Job

Completed Jobs

Customer	Job	Start Date	End Date
Brown, Jan	3rd FI Rough	04/04/2018	04/19/2018
Bob's Pizza	1st FI Rough	03/01/2018	03/15/2018
Bob's Pizza	Deck Rough	04/16/2018	04/18/2018

Return to Jobs

- To edit a Job, you must first access the job's record. Administrators have the ability to edit both open and completed jobs.
- Then select the record you want to edit.

The screenshot shows the Orion Electric web application interface. The top navigation bar includes links for Home, Timesheets, Work Orders, Employees, Customers, Reports, Settings, and Logout. The user is logged in as Jeremiah Washington. The main content area is titled 'Job Details' and displays information for a job named 'Brown, Jan: 3rd FI Rough' with a start date of 04/04/2018. The status is 'Complete'. Below this, there are input fields for Customer (Brown, Jan), Job Name (3rd FI Rough), Start Date (04/04/2018), End Date (04/29/2018), and Quoted Hours (250.00). A blue 'Edit' button is highlighted with a red rectangular box. At the bottom, there is a 'Return to Jobs' link.

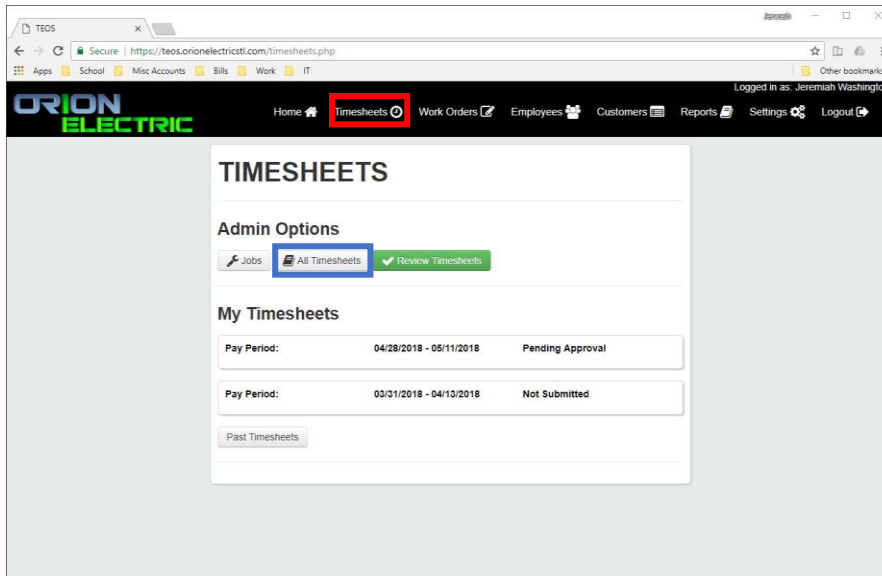
- Once the record is open, click the **Edit** button to allow the fields to be modified.

This screenshot shows the same Orion Electric Job Details page, but now the fields are editable. The 'Edit' button is no longer visible. Instead, there is a dropdown menu for the Customer field, a '+ New Customer' button, and a green 'Save' button. A red rectangular box highlights the Customer dropdown, Job Name, Start Date, End Date, and Quoted Hours fields. A blue arrow points to the 'Save' button. The 'Return to Jobs' link remains at the bottom.

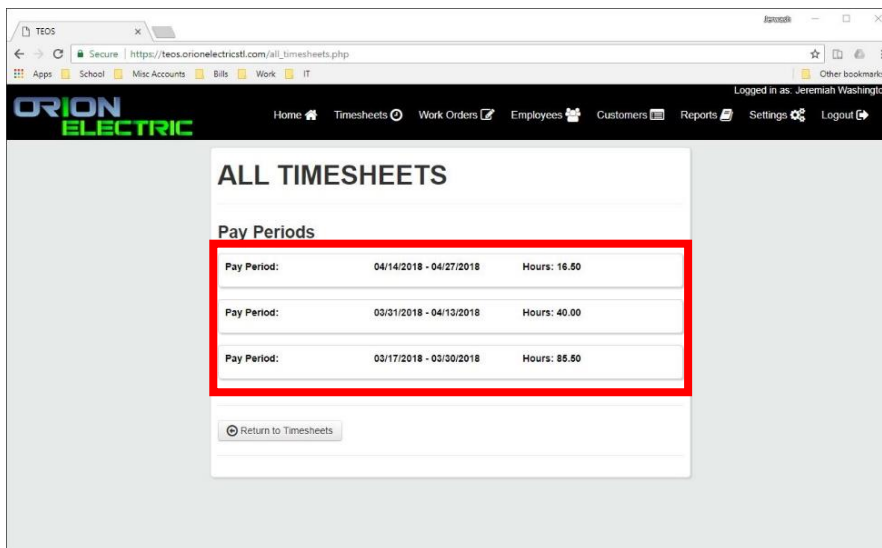
- You can now edit and of the **fields**, including the "End Date" if this record is complete.
- Once you have edited the necessary fields, click the **Save** button to finalize the changes.

3.5. Timesheets

3.5.1. View All Pay Periods

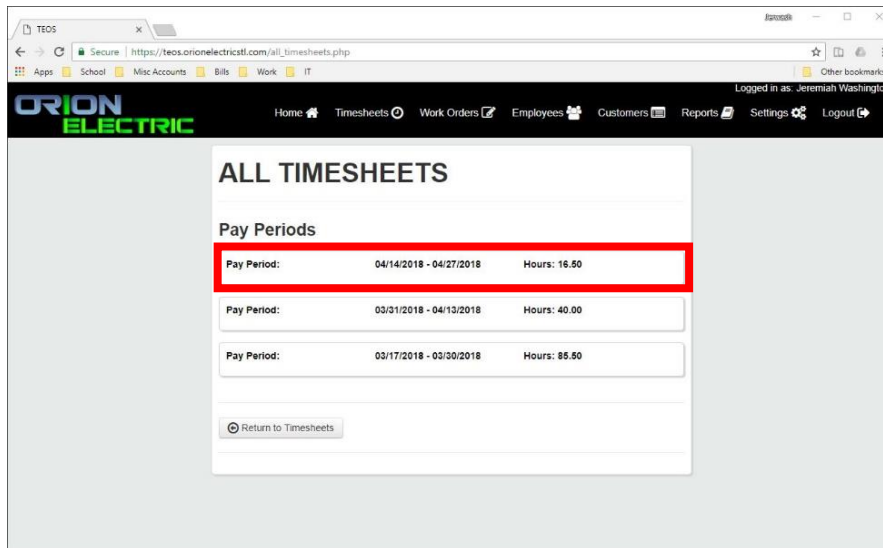


1. To view the current the current and all non-approved Pay Periods, navigate to the **Timesheet section** then click on **All Timesheets**.

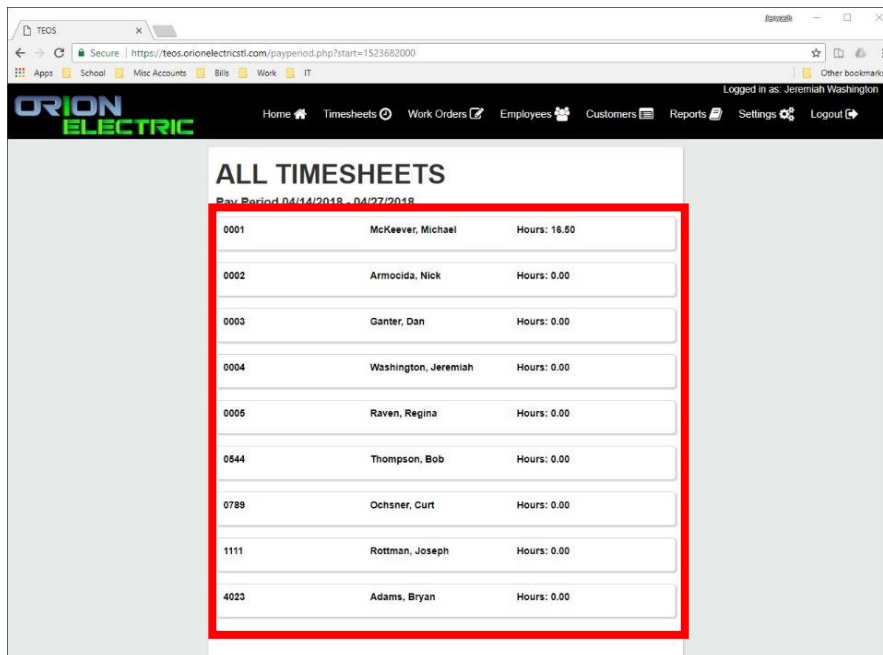


2. Once you click on "All Timesheets" you will see **all the pay periods** in descending order.

3.5.2. View Timesheets Within Pay Period

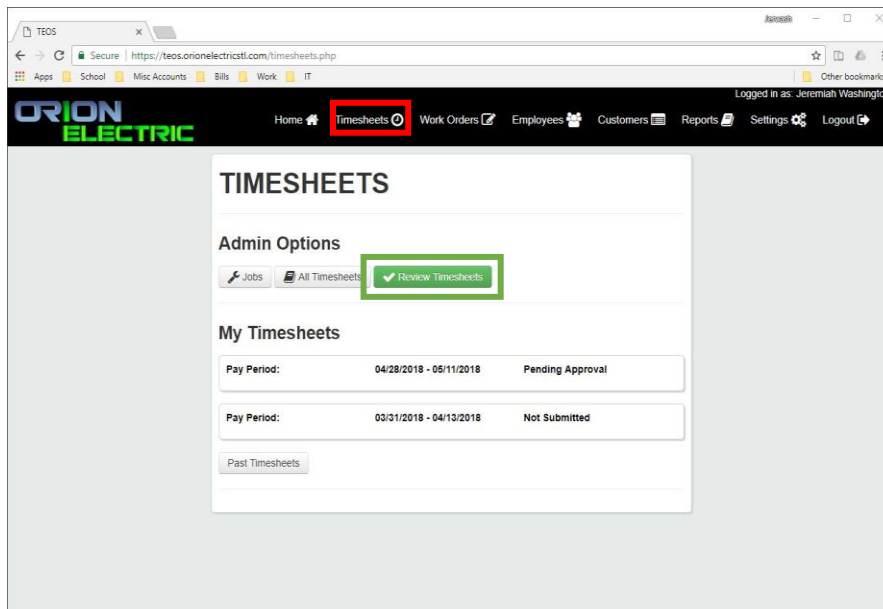


1. [See Section 3.5.2](#) to navigate to this point. To view all Timesheet within a pay period, Select the desire **record**.

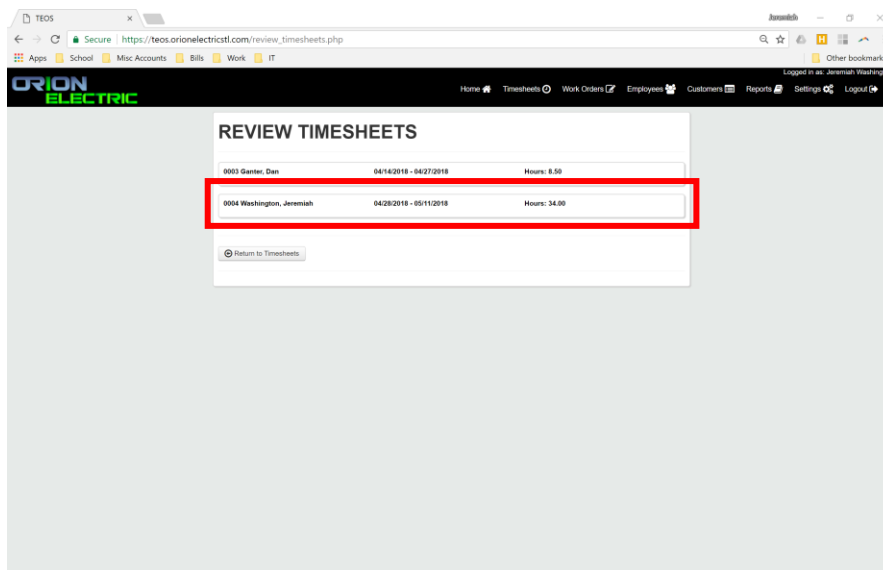


2. Once the pay period record is selected, a list of **all timesheets created during that pay period** will be generated.

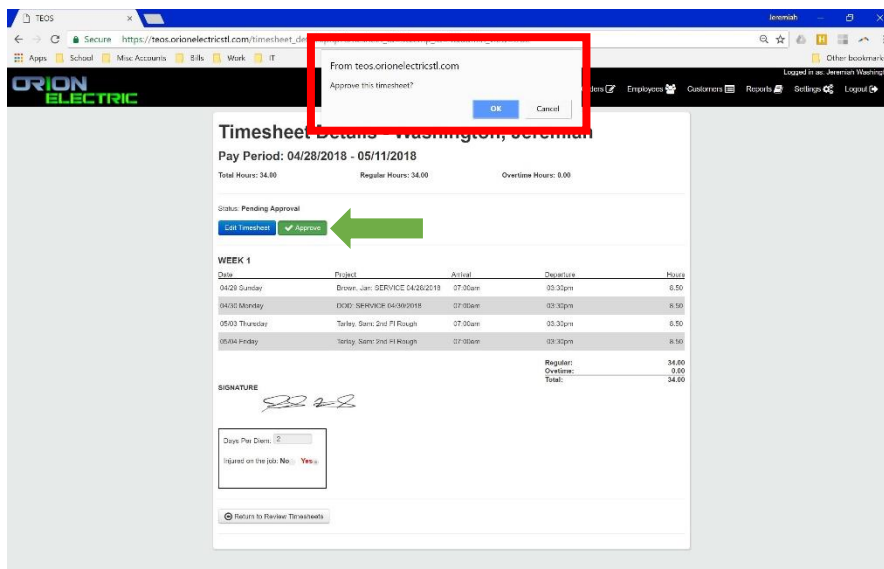
3.5.3. Review & Approve Timesheets



1. Once a timesheet has been submitted by an employee and an administrator wants to approve that timesheet, they should first, navigate to the "Timesheet" section.
2. Click on "Review Timesheets".



3. The "Review Timesheets" page will list timesheets that have been submitted for any pay period but not yet approved.
4. Select the timesheet record you wish to review.



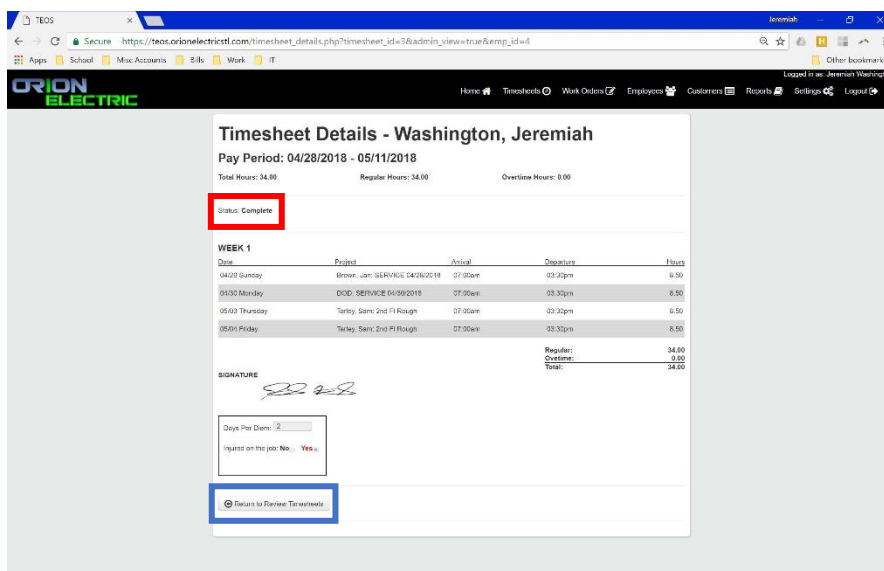
Note: Once you click “OK” in the **confirmation window**, you will no longer be able to edit the timesheet.

5. Once the Timesheet details page is loaded, click “Approve”
6. A **confirmation window** will appear ensuring that you want to finalize this timesheet as complete.

7. If you would like to edit the timesheet, refer to Sections [5.1.2](#) and [5.1.3](#), “Adding Hours to Timesheets” and “Submitting a Timesheet”, for detailed instructions.

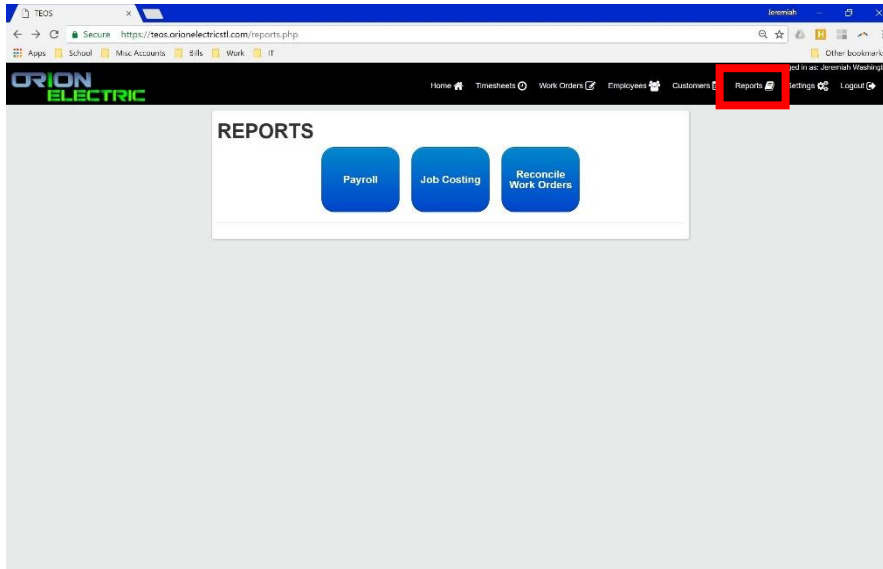
8. After finalizing the approval, the timesheet’s status will change to “**Complete**”, indicating this form can no longer be edited.

9. You may click on “Return to Review Timesheets” button to review and/or approve more timesheets.



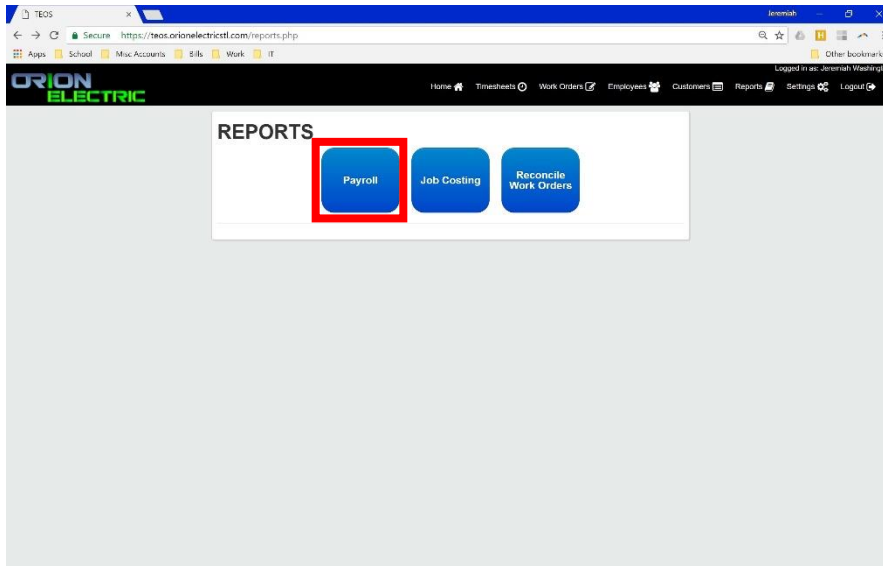
3.6. Reports

The Reports function uses queries to search your TEOS database, aggregate the data, then presents this data as information. You can use these functions quickly reference a payroll cycle, job costing or a Technician's Work Order history.

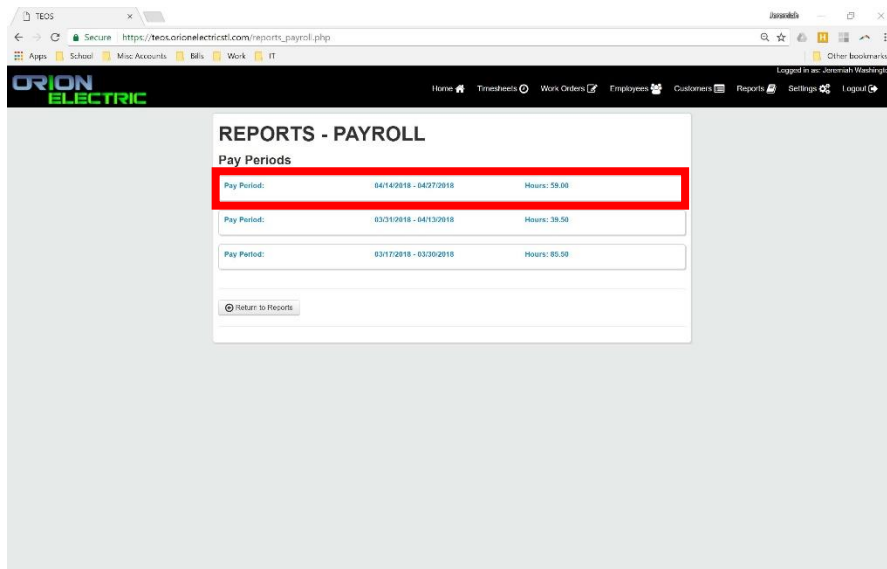


1. To reach the Reports main page, click the link labeled **“Reports”**.

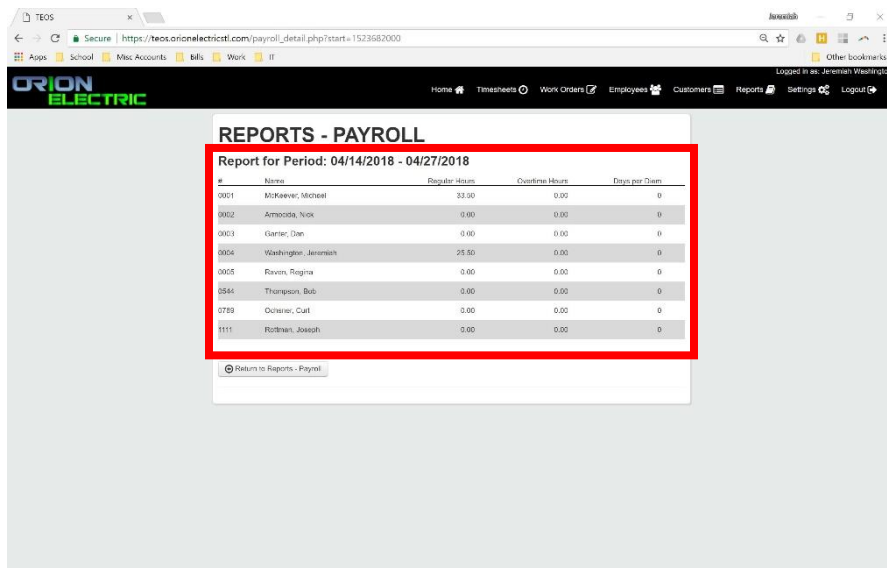
3.6.1. Payroll Reports



1. Navigate to the Reports main page can click the **“Payroll”** button.

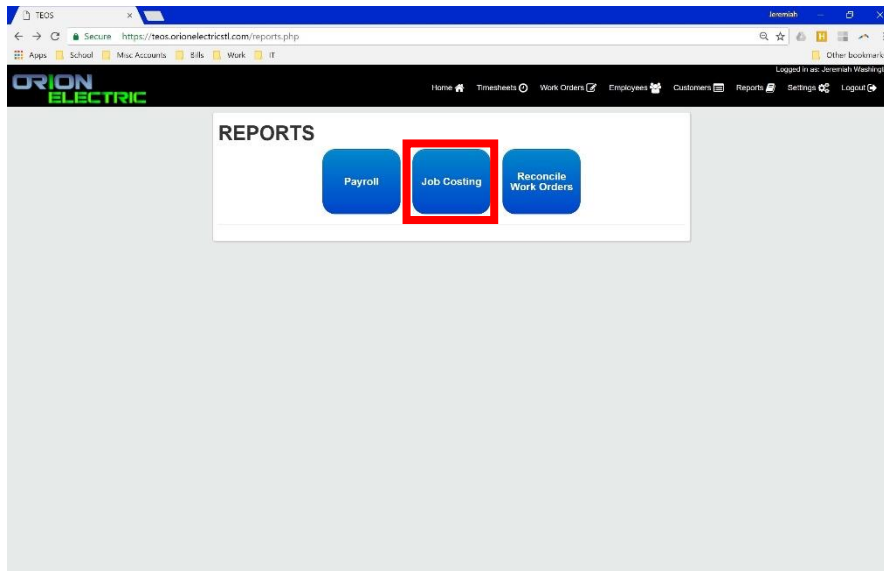


1. Select a Pay Period **record** that you would like to view.

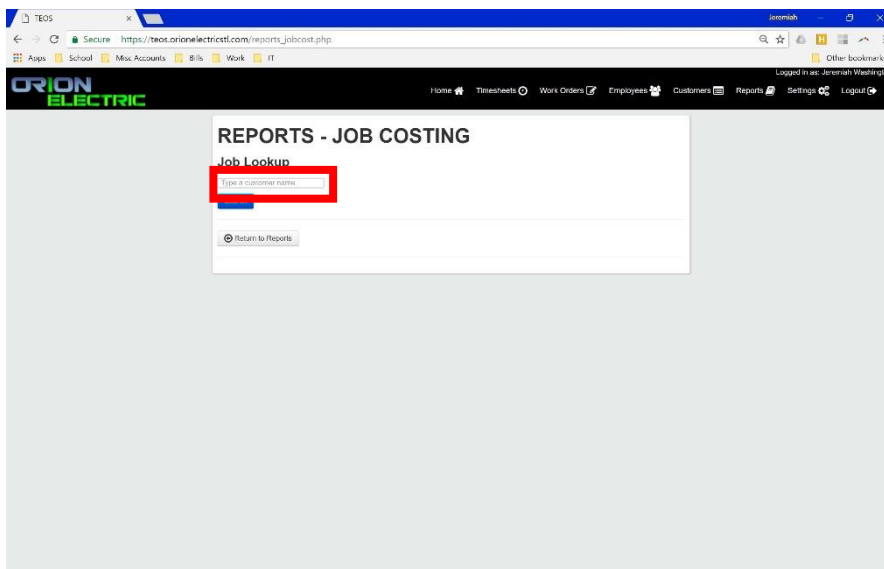


2. The report for the pay period you selected will be display, showing all timesheet records generated during that pay period, regardless of the timesheet' status. The records employees are listed by employee number. The report also displays the regular hours, overtime hours, and per diem days for each individual.

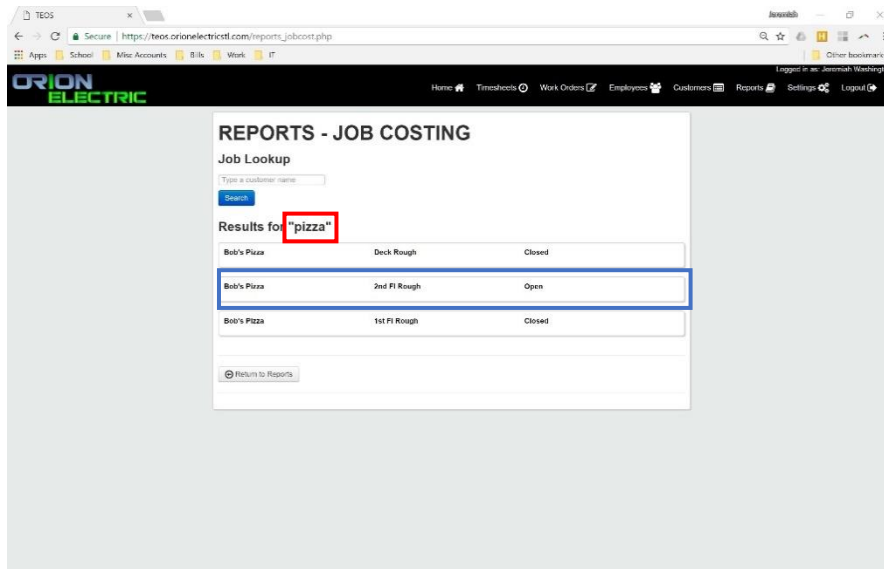
3.6.2. Job Costing Reports



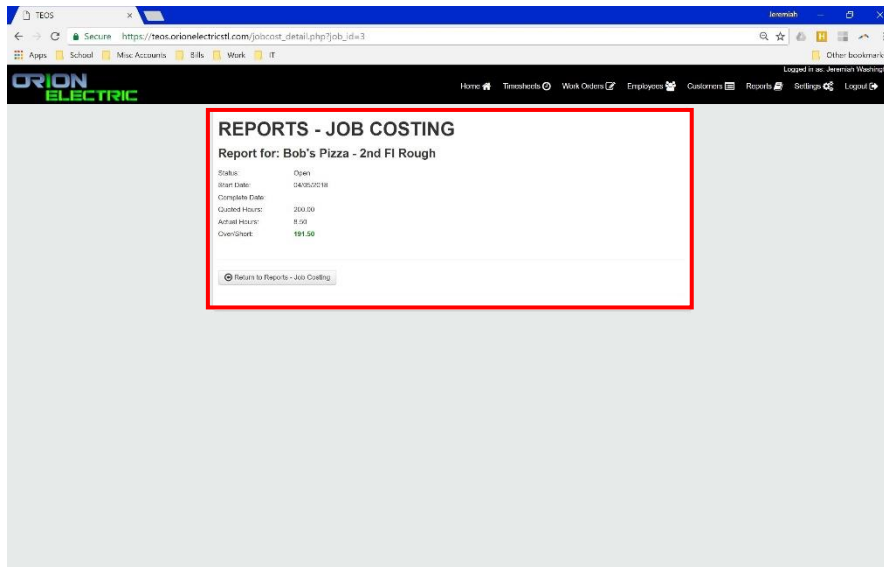
1. On the main reports page, click on the “Job Costing” button.



2. To search for a commercial customer, enter the whole or part of the company name that is attached to the customer.
3. To search for a residential customer, enter the first or last name of the customer.

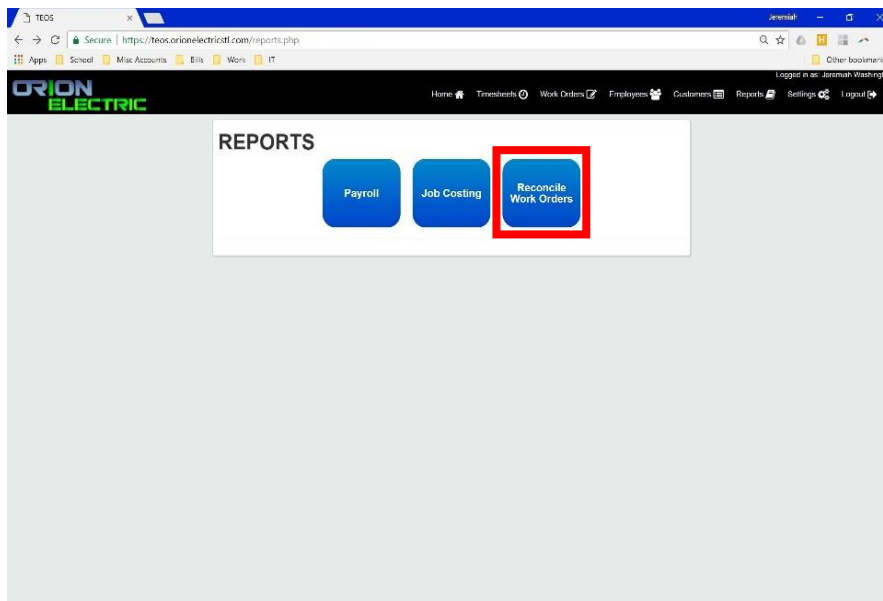


4. In our example, we searched for "Bob's Pizza", using the search parameter of "pizza"
5. Select on the record you wish to view.

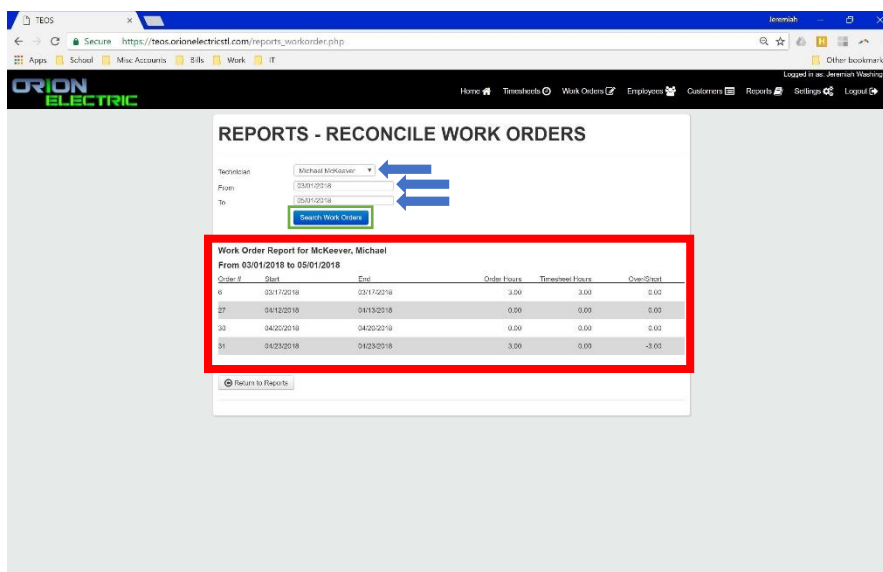


6. Selecting the record will display details about that job such as the start date, end date, quoted hours, actual hours, as well as the amount of under or over quoted hours

3.6.3. Work Order Reports



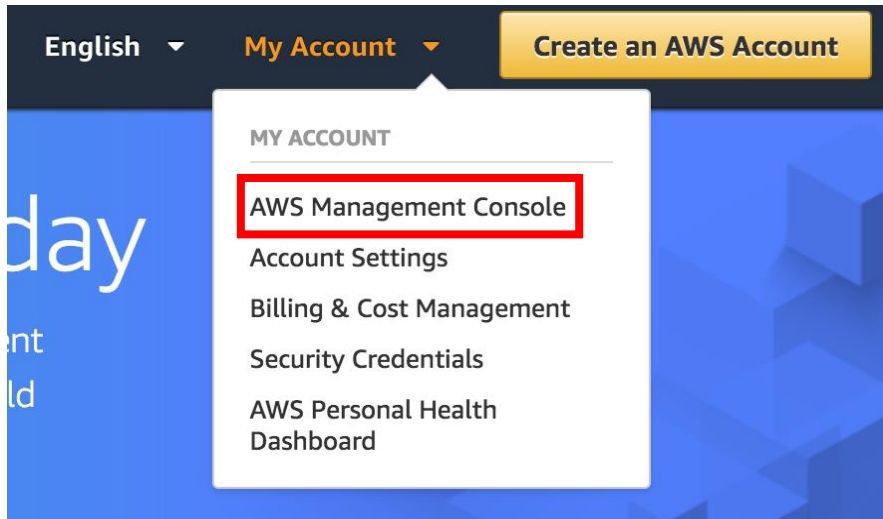
1. Navigate to the Reports main page.
2. Select the "Reconcile Work Orders".



3. Click on the Dropdown box to select the Technician you want a report on.
4. Select a "From" date.
5. Select a "To" date.
6. Click "Search Work Orders".
7. If any work orders are found that match the criteria selected, it will be displayed in ascending Work Order Number

3.7. Amazon Web Service

3.7.1. Accessing Amazon Web Service



1. Navigate to aws.amazon.com, find 'My Account' and hover over with mouse, select the 'AWS Management Console'.

3.7.2. Logging Into AWS



Sign in ⓘ

Email address of your AWS account

To sign in as an IAM user, enter your account ID or account alias instead.

admin@orionelectricstl.com

Next

— New to AWS? —

Create a new AWS account

2. Enter admin@orionelectricstl.com as the email of your AWS account



3. Enter Password for you AWS account

Root user sign in ⓘ

Email: admin@orionelectricstl.com

Password

[Forgot password?](#)

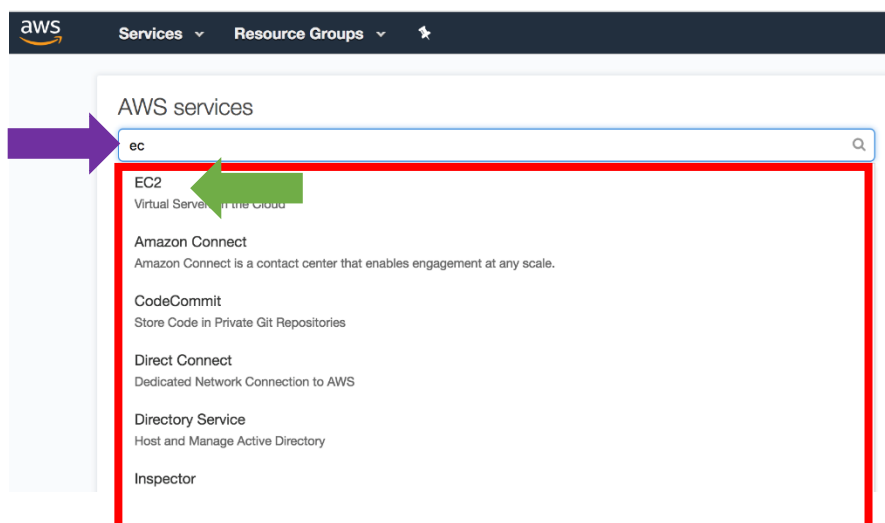
Sign in

[Sign in to a different account](#)

[Create a new AWS account](#)

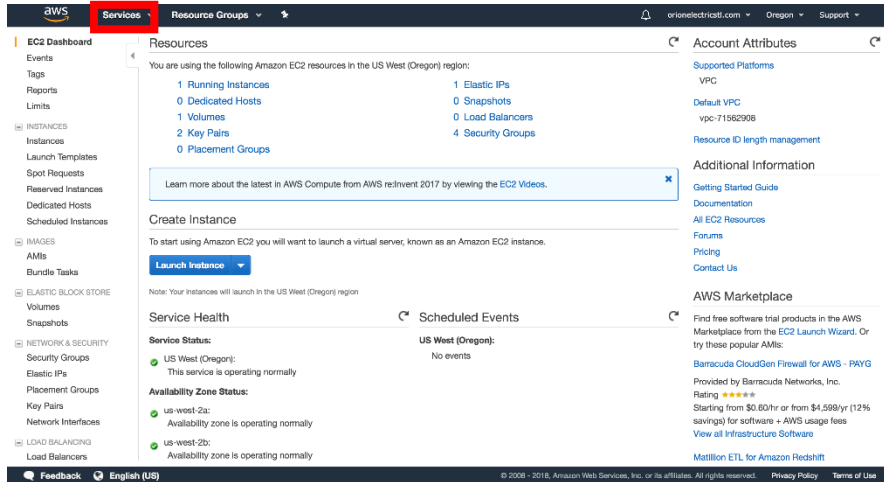
TEOS makes use of the Amazon AWS Services of Amazon EC2 (compute), Amazon S3 (storage), Amazon Elastic Beanstalk (Infrastructure Management), and Amazon SES (email sending).

3.7.3. Navigating AWS



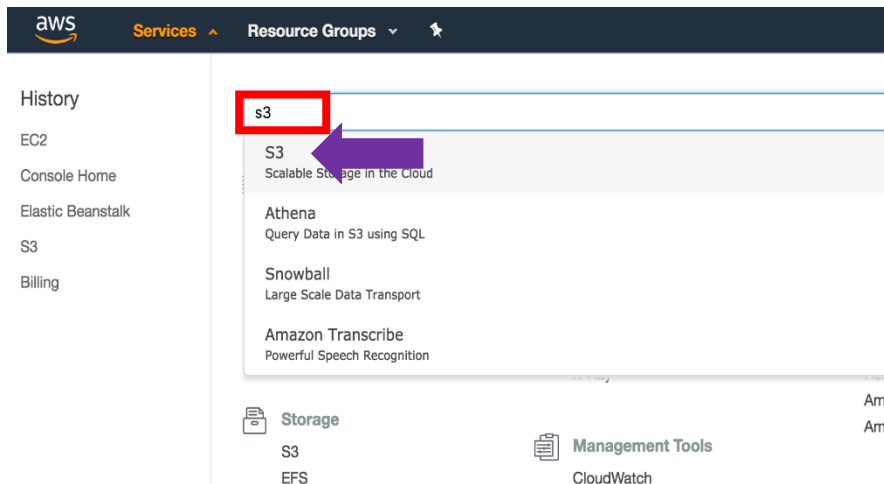
4. After sign-in you will be redirected to this page which shows all of Amazon AWS services which they have available.
5. Notice how 'ec', was typed and a list of services drops down. Select EC2 from the list.

NOTE: The TEOS system makes use of only some of these services. This portion of the user manual will now draw attention to the specific services used by the TEOS system. Due to the vast number of services available it makes most sense to use the search function shown at the top of the screen after log in.

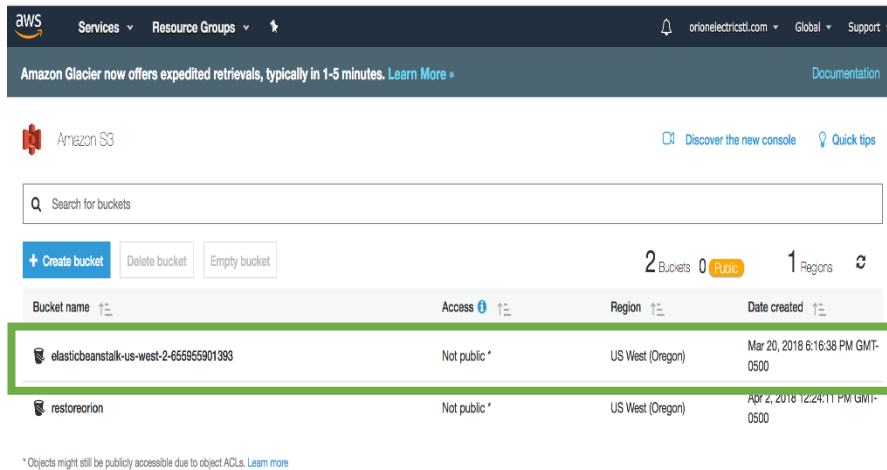


6. You are now shown detailed information about the Amazon EC2 Linux Instance Operating System which is running in the cloud.

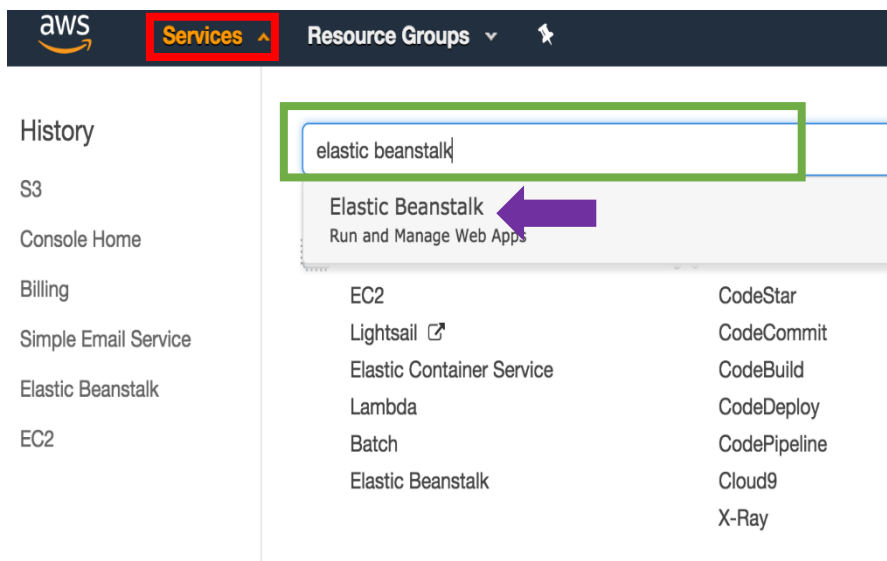
7. To access other services, navigate to the top left of the screen, and click 'services'.



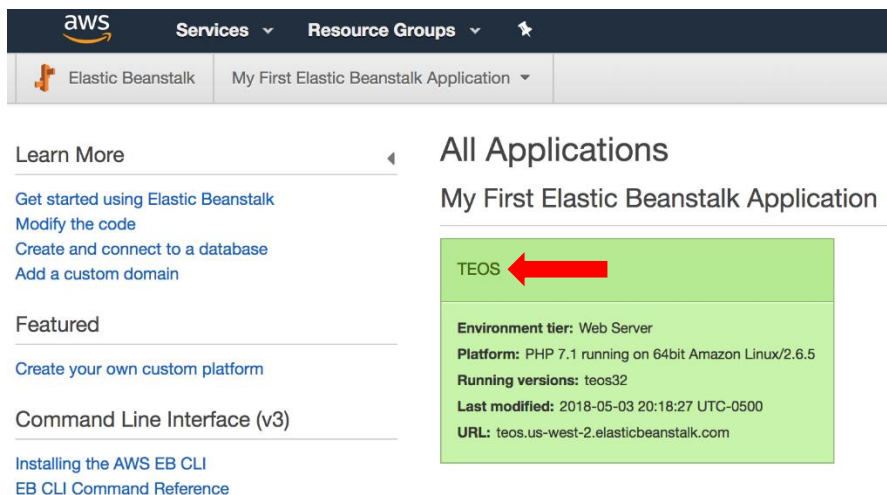
8. We will now type 'S3', selecting the S3 service as it drops down.



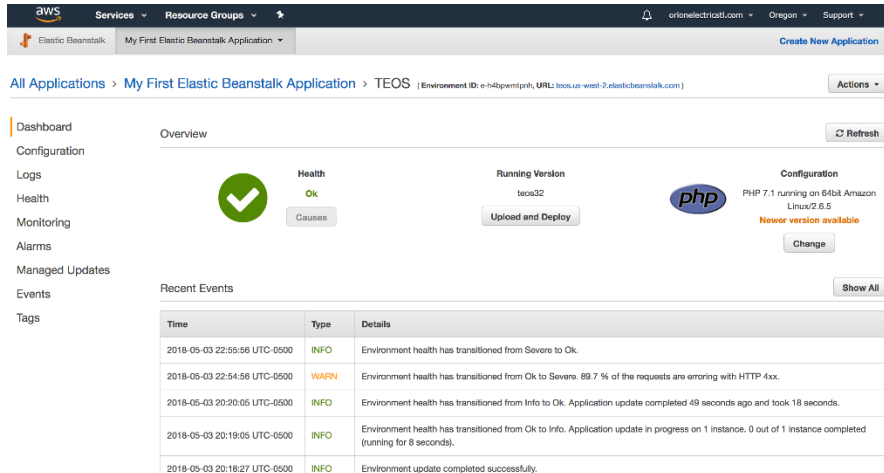
9. We are shown the **files** which are stored by the operating system.



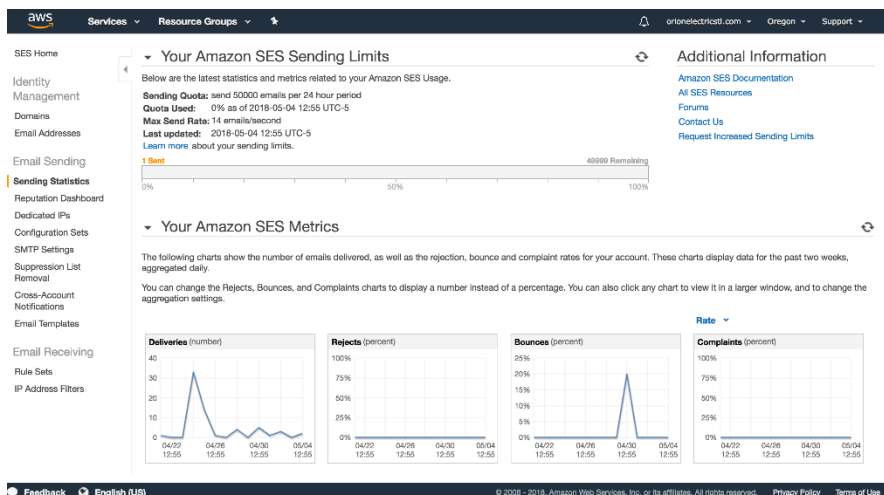
10. Navigating to the top left of the screen, and hovering over **services**, type **elastic beanstalk**, in the search bar then click 'Elastic Beanstalk'.



11. We are now viewing the Amazon AWS Elastic Beanstalk service. In the green box select **'TEOS'**.



12. We are now shown the Amazon AWS Elastic Beanstalk service. This is where the PHP code is uploaded which then executes on the server. The Amazon AWS Elastic Beanstalk service is a service which takes code, spreads the configuration across the appropriate AWS services. We can think of the Elastic Beanstalk service as being an intermediary management system between the compute (EC2) and the storage (S3), which simplifies the management of the resources.

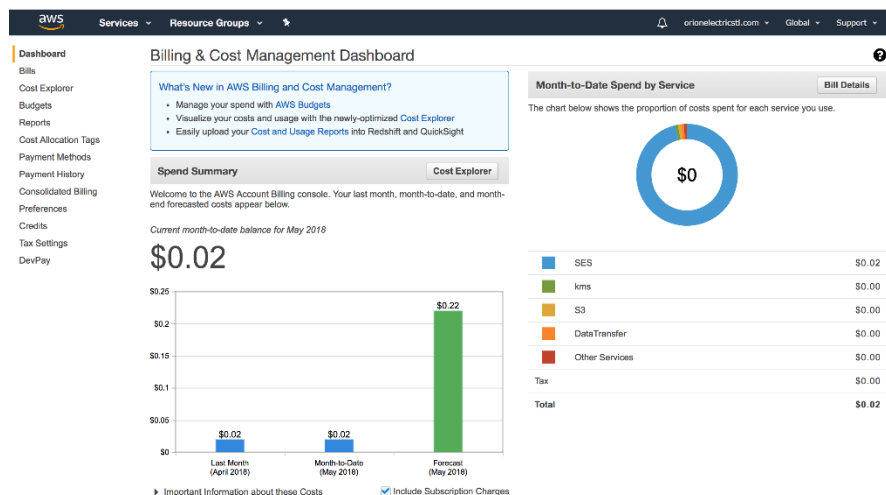


13. We now navigate to services, search for 'ses', the Amazon AWS Simple Email Service drops down, select the service.

14. The Amazon AWS Simple Email Service is an SMTP service which relays (sends) email from the server. The PHP holds functions which using the SMTP protocol, the server sends using a PHPMailer function via SMTP to Amazon Simple Email Service, then the AWS SES service relays the email message to the intended address.

15. Navigate to the top left of the screen, hover mouse over services, in the search box type 'billing', and press enter.

16. This is the area of Amazon Web Services which explains monthly billing. The current amount which will be charged to the card on file at the end of the month as well as an advanced line item break down of the charges. If there is a question at any time on what was charged and why



this is the portion of AWS which will want to be audited.

3.7.4. Troubleshooting

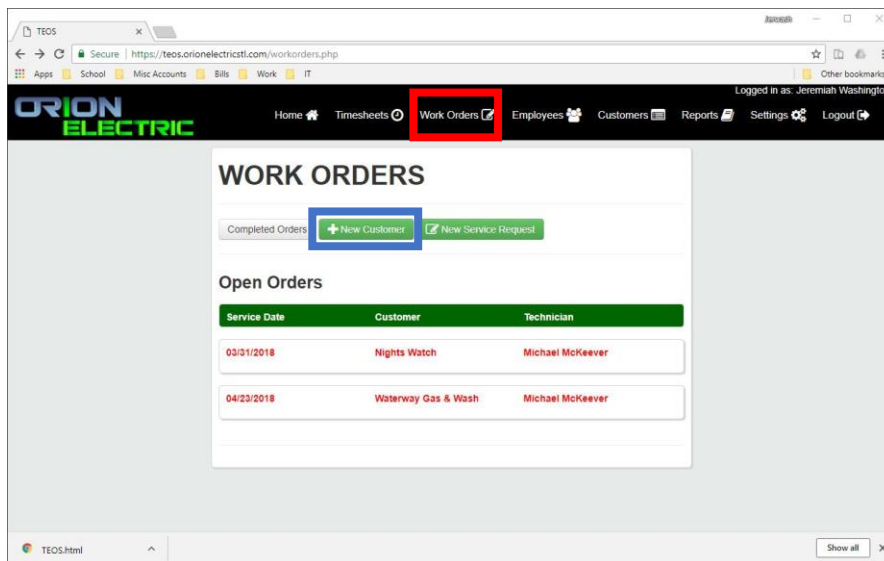
In the event of a system failure. Please navigate to the Backup and Recovery Procedure document.

4. Service Technician Account

4.1. Work Orders

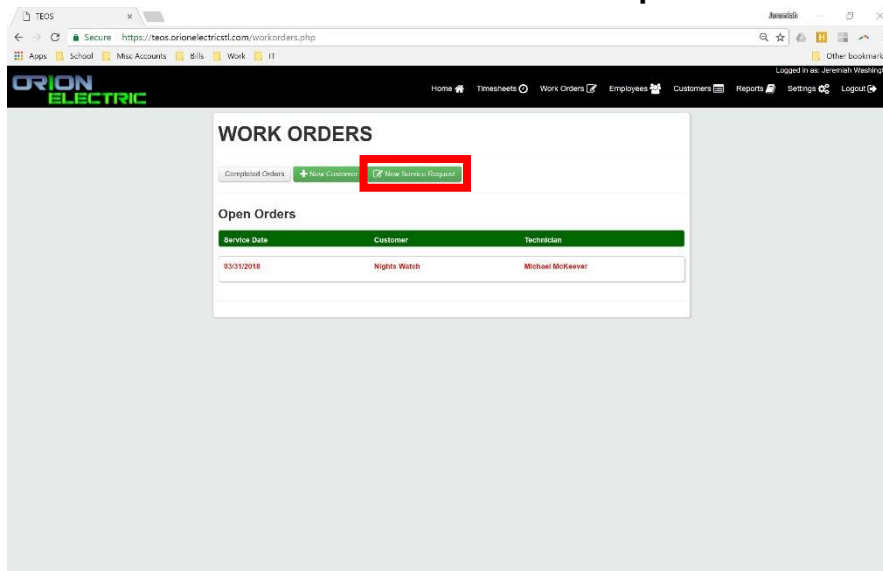
4.1.1. Creating Work Order

4.1.1.1. Create New Customer

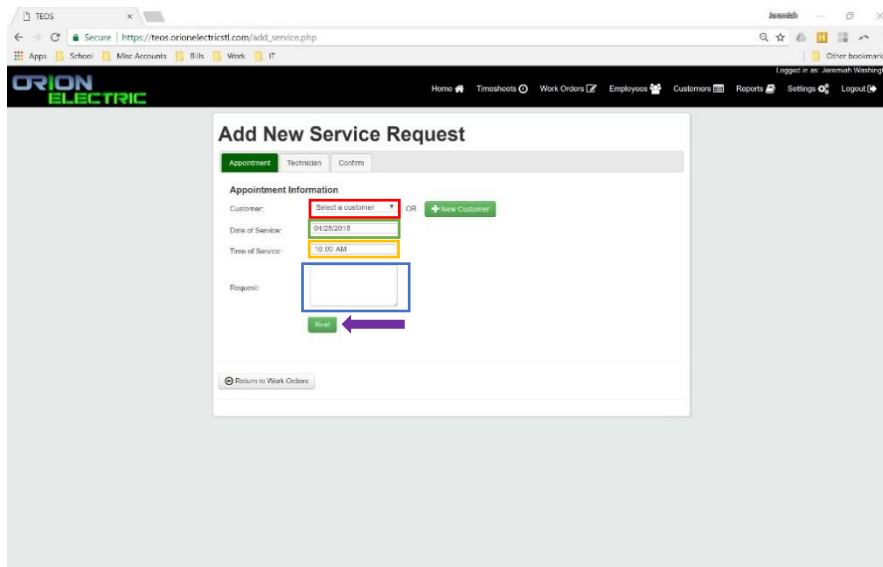


1. To create a new customer, first navigate to the Work Orders main page by click on the [link](#).
2. Click on the “[New Customer](#)” button and refer to Section [3.3.2 step 2](#).

4.1.1.2. Create Service Request



1. Click on “**New Service Request**”



2. Use the **dropdown box** to select a customer or create a new customer if needed.
3. Select a “**Date a Service**”.
4. Enter a “**Time of Service**” Remember to enter a.m. or p.m.
5. Type in the **service that's being requested**.
6. Click the “**Next**” button when finished.

TEOS

Secure https://teos.orionelectricltd.com/add_service.php#tab=2

ORION ELECTRIC

Home Timesheets Work Orders Employees Customers Reports Settings Logout

Add New Service Request

Appointment Technician **Confirm**

Assign a Technician

Technician: Dust Osborne

Next ←

[Return to Work Orders](#)

- 7.
8. Use the **dropdown** box to select the Technician assigned to the request.
9. Click the **“Next”** button when finish.

TEOS

Secure https://teos.orionelectricltd.com/add_service.php#tab=3

ORION ELECTRIC

Home Timesheets Work Orders Employees Customers Reports Settings Logout

Add New Service Request

Appointment Technician **Confirm**

Confirm Appointment

Customer: Brewitt, Jan

Date: 24/09/2018

Time: 10:00 AM

Technician: Washington, Jerome

Request: Fix Wiring

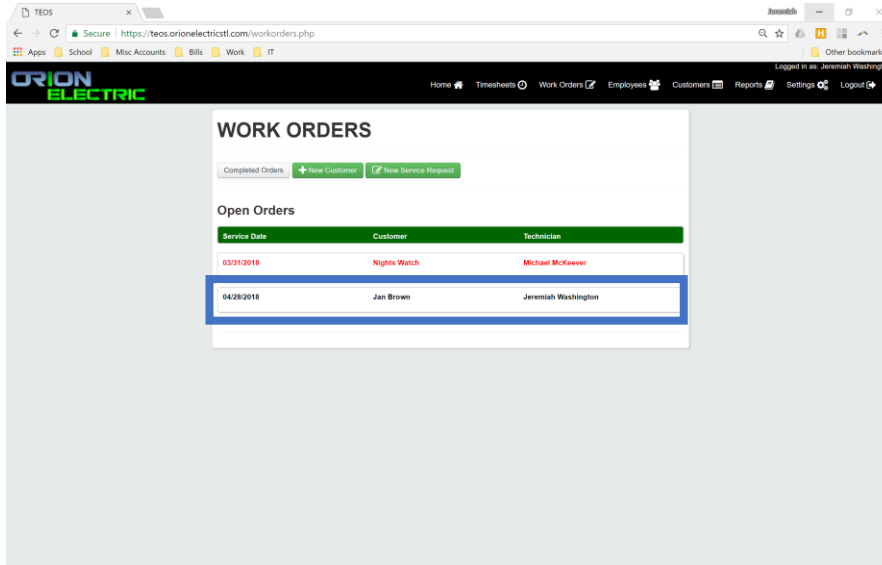
Save new appointment ←

[Return to Work Orders](#)

10. Review **all the information** for accuracy.
11. Click **“Save New Appointment”** to finalize the request.
12. Saving an appointment creates a record for the Work Order.

4.1.2. Completing Work Order

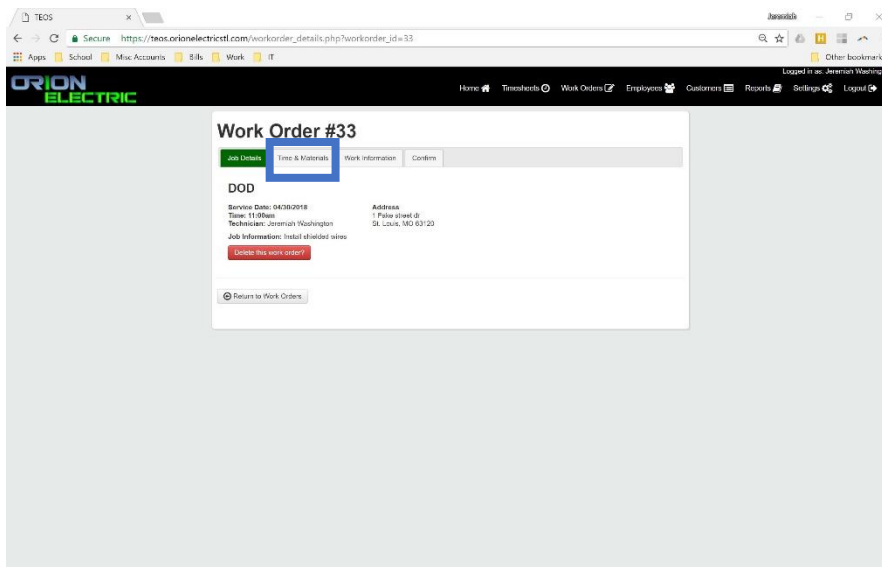
4.1.2.1. Select Open Work Order



1. To Select an open work order, navigate to the Work Order main page
2. Select the **open order record** you want to open.

Note: When viewing the Work Orders main page, Open Orders that are still open for more that 48 hours after scheduled service date, turn red.

4.1.2.2. Time and Materials



1. when you select the open record, the first tab will display detail about the service requested and customer.
2. Select the **“Time & Materials”** tab to proceed.

Work Order #32

Job Details | **Time & Materials** | Work Information | Confirm

Time & Materials:

Line	Type	Quantity	Description	Unit Cost	Extended Cost
1	Material				

Total: \$

[Return to Work Orders](#)

- Click the **dropdown** box and select materials or labor for that line type.
- Enter the **quantity of material** you used, or labor is selected, enter the how many hours in using .25hr increments.
- Enter **description** of item or labor.
- Enter the **cost of labor or the unit cost of the product used**.
- Click the plus sign to save that line and prompt another.

Work Order #32

Job Details | **Time & Materials** | Work Information | Confirm

Time & Materials:

Line	Type	Quantity	Description	Unit Cost	Extended Cost
1	Material	2.00	10 Feet Cat5 Wire	\$5.00	\$10.00
2	Material				

Total: \$

[Return to Work Orders](#)

- Entries can be deleted by click on the "X" that appears after a line has been added.

4.1.2.3. Work Information

Work Order #32

Job Details | Time & Materials | **Work Information** | Confirm

Date of Completion: 04/28/2018

Job Address:
 1 University Blvd
 Normandy, MO 63120

Description of work performed:
 Run 17ft of cable to server room.

[Return to Work Orders](#)

1. Click on the “**Work Information**” to continue.
2. Click in the “**Date of Completion**” box to enter an estimated date of completion, then click “**Save**” to retain this information.
3. Click in the “**Job Address**” field and enter the address where the work is actually being performed not the billing address.
4. Click in the “**Description of Work Performed**” to complete this field.
5. Click “**Save**” to retain this information.

4.1.2.4. Confirm & Complete Work Order

Work Order #32

Job Details | Time & Materials | Work Information | **Confirm**

ORION ELECTRIC
 5614 Institute Drive #100
 Des Moines, IA 50319
 (515) 281-1010

BILL TO:
 Jan Brown
 54 Walnut St
 Chesterfield, MO 63005

ELECTRICAL
 Work Order/Invoice #00002
 DATE OF ORDER: 04/28/2018
 DATE OF COMPLETION: 04/28/2018
 JOB ADDRESS:
 1 University Blvd Normandy, MO 63120

DESCRIPTION OF WORK
 Run 17ft of cable to server room.

LABOR			
LABOR	HOURS	@	AMOUNT

MATERIALS			
QTY	MATERIALS	@	AMOUNT
5.00	10 Foot Cat6 1000	\$2.00	\$10.00
			TOTAL: \$10.00

TOTAL LABOR: \$0.00
 TOTAL MATERIALS: \$10.00
TOTAL: \$10.00

[Return to Work Orders](#)

1. Click on the “**Confirm**” tab to move to continue.
2. Review all the information for accuracy then click “**Confirm**”.

ORION ELECTRIC

84 Hubble Drive #100
Dyersburg, TN 37625
(615) 445-3010

BILL TO:
Jan Brown
84 Hubble Dr
Dyersburg, TN 37625

ELECTRICAL
Work Order/Invoice #00032
DATE OF ORDER: 04/09/2018
DATE OF COMPLETION: 04/09/2018
JOB ADDRESS:
1 University Blvd Normandy, MO 63120

DESCRIPTION OF WORK
Run 17ft of cable to server room.

LABOR		HOURS	AMOUNT
QTY	MATERIALS		AMOUNT
2.00	10 Foot Cat5 Wire		\$10.00
			TOTAL: \$10.00

TOTAL LABOR: \$0.00
TOTAL MATERIALS: \$10.00
TOTAL: \$10.00

I hereby acknowledge the satisfactory completion of the above described work.

☐ Send Email?

[Clear](#) [Undo](#) [Authorize](#)

- Once “Confirmed” is clicked, you will be prompt to enter an **electronic signature** from the client.

ORION ELECTRIC

84 Hubble Drive #100
Dyersburg, TN 37625
(615) 445-3010

BILL TO:
Jan Brown
84 Hubble Dr
Dyersburg, TN 37625

ELECTRICAL
Work Order/Invoice #00032
DATE OF ORDER: 04/09/2018
DATE OF COMPLETION: 04/09/2018
JOB ADDRESS:
1 University Blvd Normandy, MO 63120

DESCRIPTION OF WORK
Run 17ft of cable to server room.

LABOR		HOURS	AMOUNT
QTY	MATERIALS		AMOUNT
2.00	10 Foot Cat5 Wire		\$10.00
			TOTAL: \$10.00

TOTAL LABOR: \$0.00
TOTAL MATERIALS: \$10.00
TOTAL: \$10.00

I hereby acknowledge the satisfactory completion of the above described work.

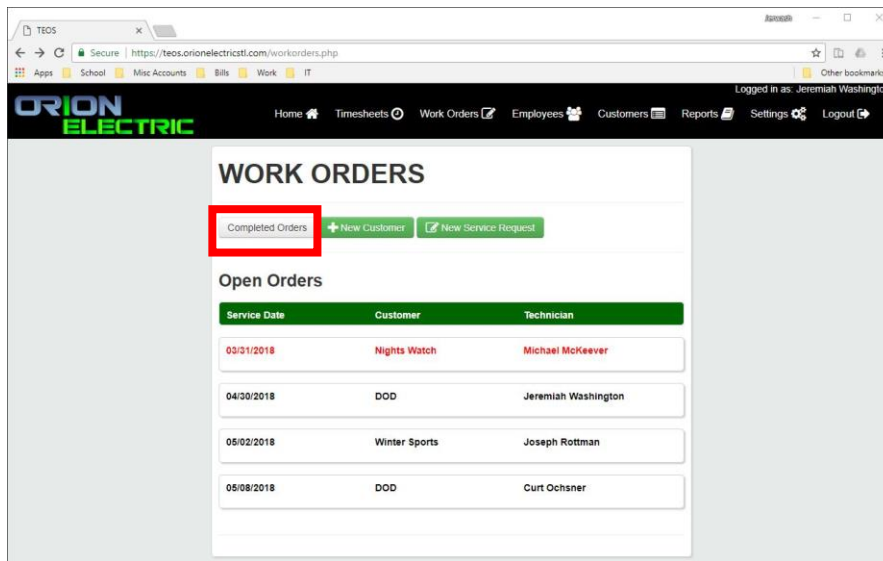
☐ Send Email?

[Clear](#) [Undo](#) [Authorize](#)

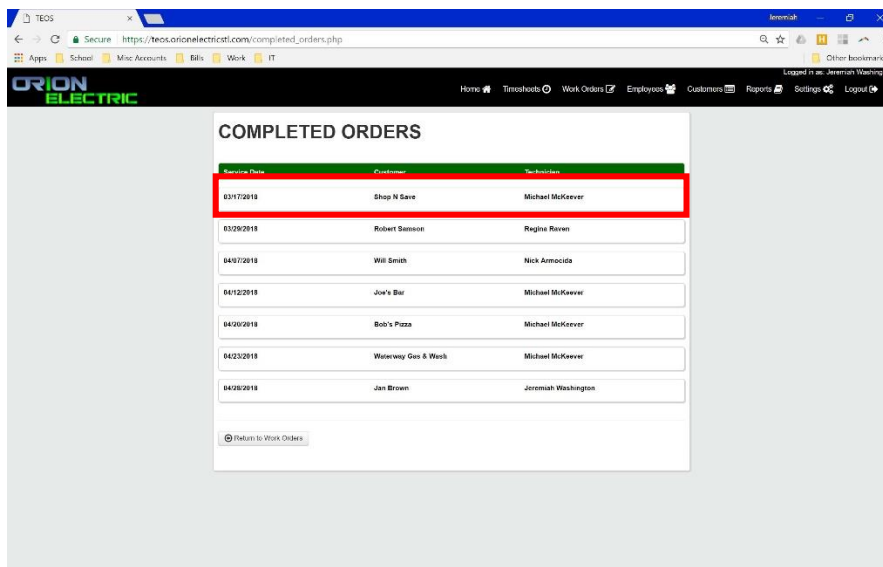
[Return to Order Details](#)

- If **send email is checked**, a PDF of this invoice will be sent to the customer's save email upon completion.
- Click “**Authorized**”, to complete this invoice.

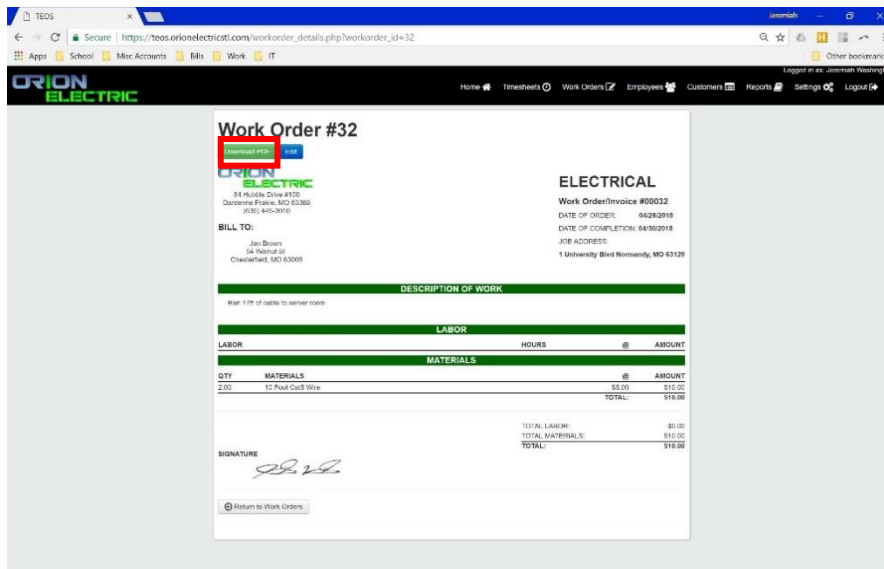
4.1.3. Download Work Order PDF



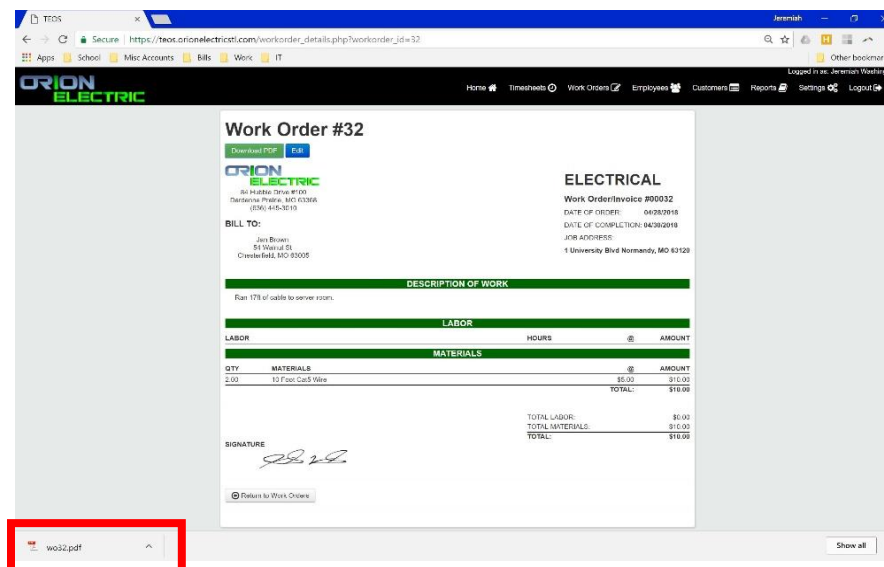
1. To Download a PDF of a Work Order, navigate to the Work Orders, main page
2. Click on the **“Completed Order”** button.



3. Select the Work Order record that you want to open.



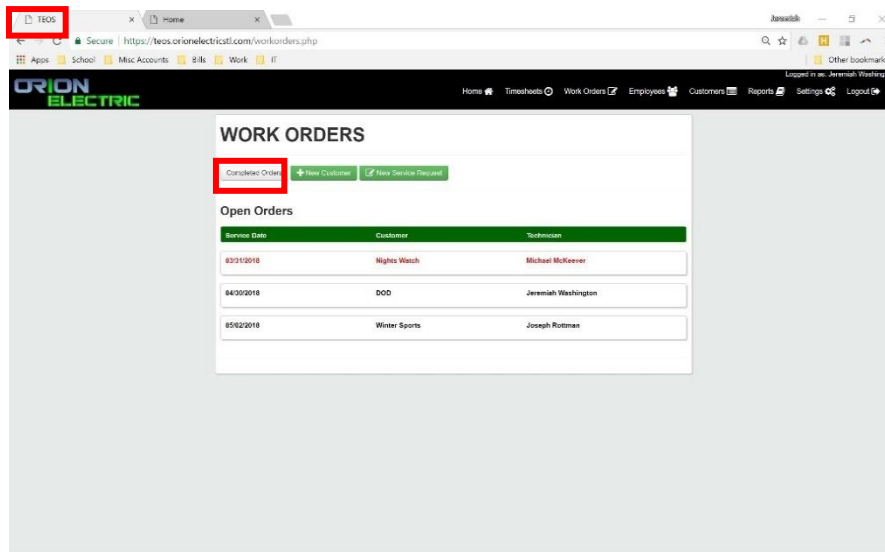
4. Click the “Download” button and the PDF will automatically begin downloading.



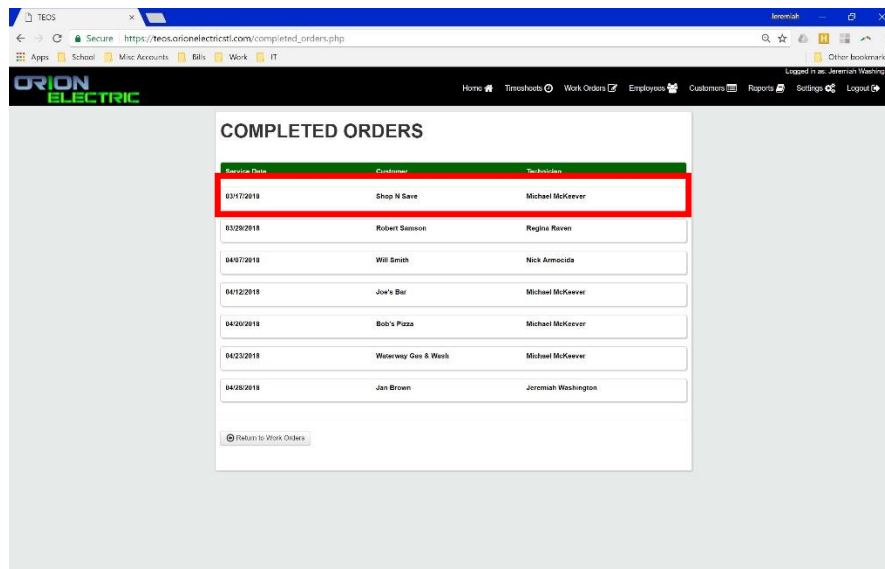
5. The file will download to your default location.

- 6.

4.1.4. Edit Signed Work Order



1. To edit a signed work order, navigate to the Work Orders main page
2. Click “Completed Orders” button.



3. Select **record** you want to open.

4. Click the “**Edit**” button.
5. A window will appear asking you if you are sure you wish to edit.
6. Click “**OK**” if you wish to continue editing.

Note: Once you confirm that you wish to edit by clicking “**OK**”, the signature will be removed from the recorded.

5. Basic Account

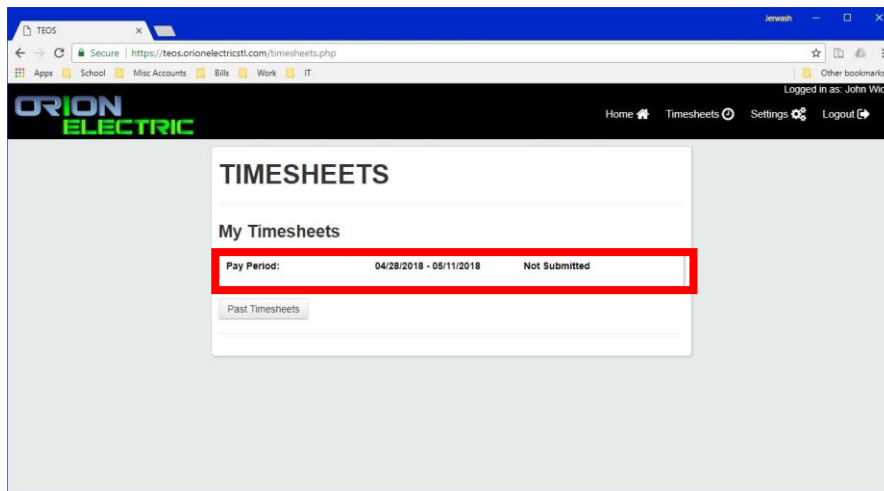
5.1. Navigating Timesheets

All users will have access to their own Timesheets, located in the timesheets section, on the main page.

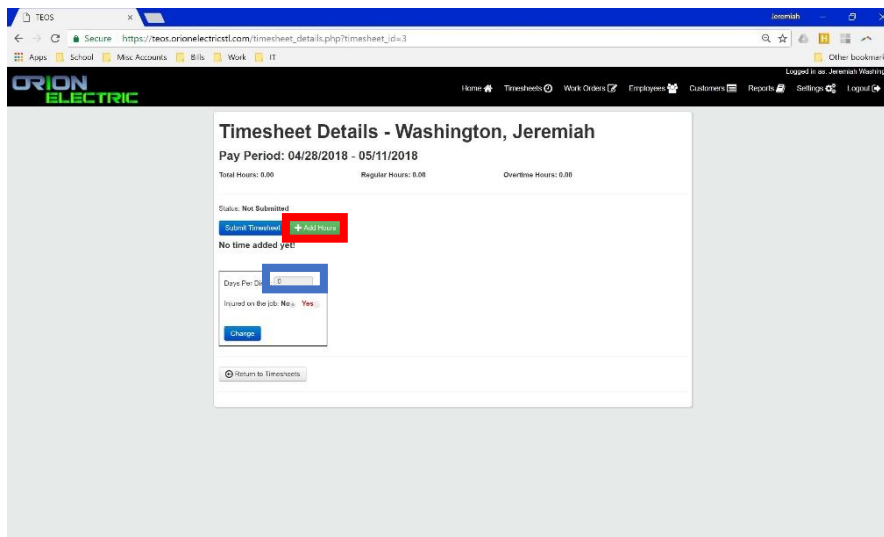
5.1.1. Selecting Appropriate Pay Period

1. By default, users will be able to view the current periods **Timesheet**.
2. Click on the “**Past Timesheets**” button to view older timesheets.

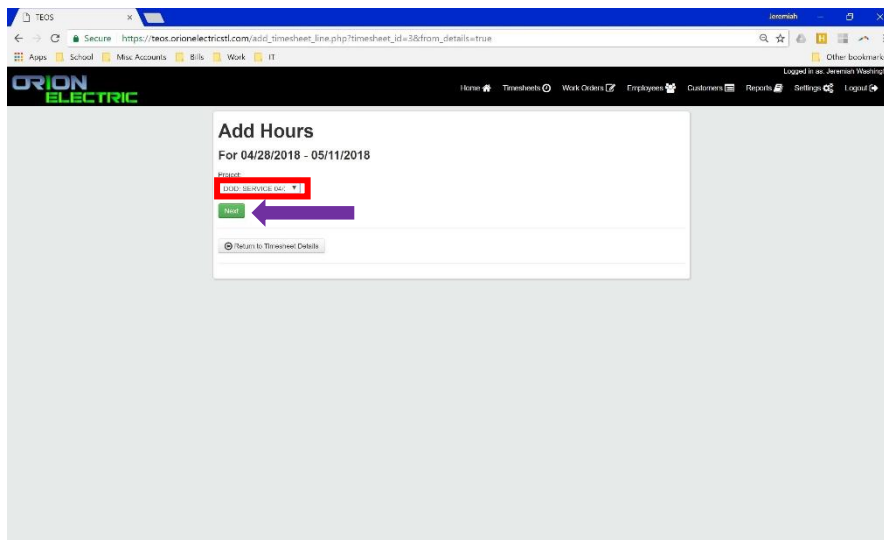
5.1.2. Completing timesheet



1. To add hours to a timesheet, select the appropriate **record**.

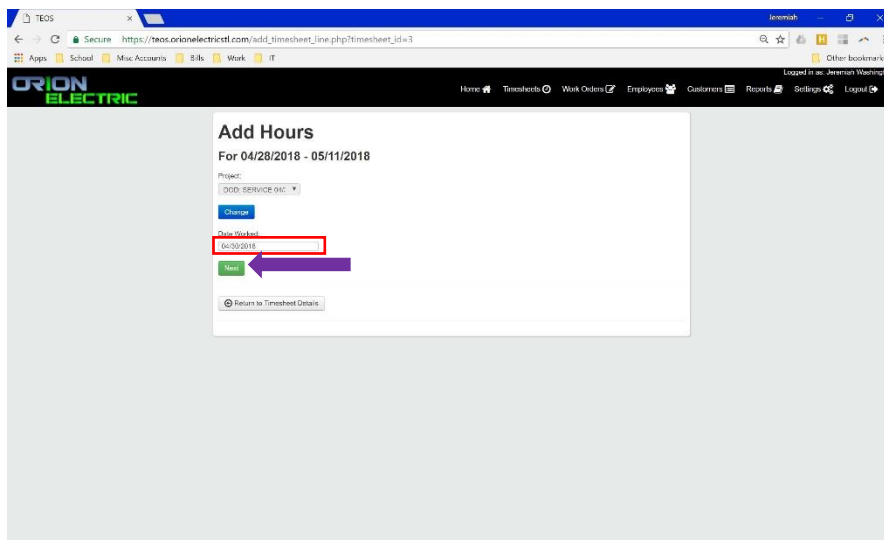


2. Once the record is opened.
3. Enter the total days that you were approved **per diem**.
4. Click the appropriate **radio button** asking whether you were injured or not. The button is set to "NO" by default.
5. Click on the "**Add Hours**" button to add time to timesheet.



6. Click on the **dropdown** box to select a project.

7. Click “**Next**” to continue.



8. Click in the **dropdown** to select the date you work at this project.

TEOS | Orion Electric

Home | Timesheets | Work Orders | Employees | Customers | Reports | Settings | Logout

Add Hours

For 04/28/2018 - 05/11/2018

Project: DDD SERVICE, INC. [Change](#)

Date Worked: 04/30/2018 [Change](#)

Departure: 03:30 PM

[Next](#)

[Return to Timesheet Details](#)

9. Click within the **dropdown** boxed to select the start time and end time for the day.
10. Click **Next** to continue.

TEOS | Orion Electric

Home | Timesheets | Work Orders | Employees | Customers | Reports | Settings | Logout

Add Hours

For 04/28/2018 - 05/11/2018

Project: DDD SERVICE, INC. [Change](#)

Date Worked: 04/30/2018 [Change](#)

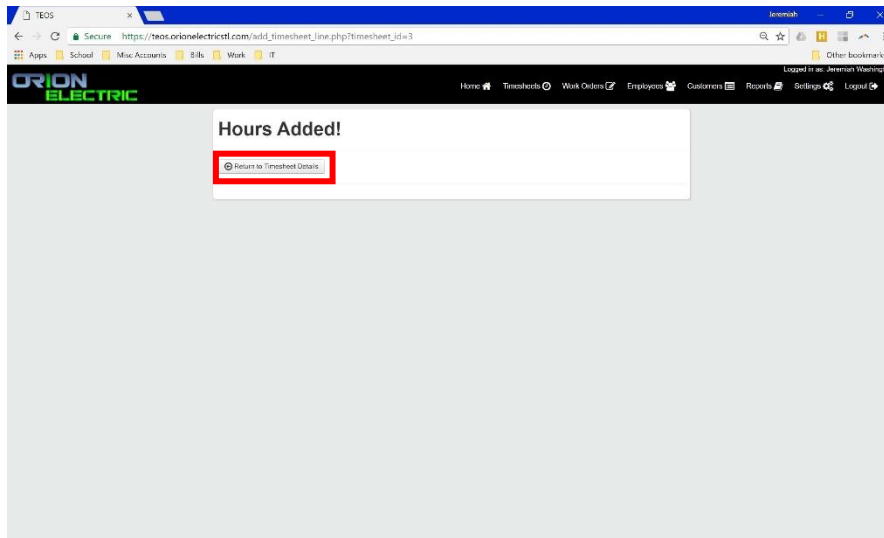
Arrival: 07:00 AM

Departure: 03:30 PM [Change](#)

[Confirm This Entry](#)

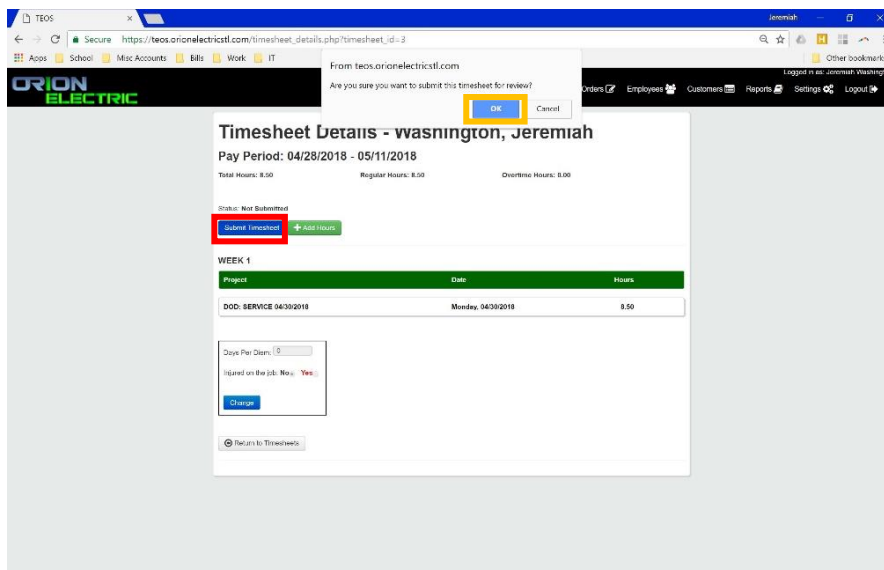
[Return to Timesheet Details](#)

11. You may click on the **Change** buttons to edit the entry or click **Confirm This Entry** to continue.



12. After the entry is confirmed, you can click the “Return to the Timesheet” button to add more hours.

5.1.3. Submitting Timesheets



1. To submit a timesheet, open timesheet record.
2. Click the “Submit Timesheets” button.
3. You will be prompted to confirm that you are submitting a timesheet. Click “OK”

Note: Users cannot submit a timesheet before the end of the pay period.

Submit Timesheet

WEEK 1

Date	Project	Arrival	Departure	Hours
04/29 Sunday	Brown, Jan SERVICE 04/28/2018	07:00am	03:30pm	8.50
04/30 Monday	DOD SERVICE 04/30/2018	07:00am	03:30pm	8.50
05/01 Tuesday	Taney, Sam 2nd Fl Rough	07:00am	03:30pm	8.50
05/04 Friday	Taney, Sam 2nd Fl Rough	07:00am	03:30pm	8.50
Regular:				34.00
Overtime:				0.00
Total:				34.00

I hereby acknowledge the accuracy of all hours worked stated on this timesheet.

[Signature]

[Clear](#) [Undo](#) [Authorize](#) [Return to Timesheet Details](#)

- Once you've confirmed that you want to submit a timesheet. You will be prompted to **sign the timesheet**.
- After you've sign the timesheet, click **"Authorized"** to finalize the submission.

Timesheet Details - Washington, Jeremiah

Pay Period: 04/28/2018 - 05/11/2018

Total Hours: 34.00 Regular Hours: 34.00 Overtime Hours: 0.00

[Edit Timesheet](#)

WEEK 1

Date	Project	Arrival	Departure	Hours
04/29 Sunday	Brown, Jan SERVICE 04/28/2018	07:00am	03:30pm	8.50
04/30 Monday	DOD SERVICE 04/30/2018	07:00am	03:30pm	8.50
05/01 Tuesday	Taney, Sam 2nd Fl Rough	07:00am	03:30pm	8.50
05/04 Friday	Taney, Sam 2nd Fl Rough	07:00am	03:30pm	8.50
Regular:				34.00
Overtime:				0.00
Total:				34.00

SIGNATURE *[Signature]*

Days Per Client: 2

Injured on the job: No

[Return to Timesheet](#)

- A review page will load after you have finalized your timesheet.
- If you see a mistake, click **"Edit Timesheet"** button. This will remove signature and allow the field to be edited.

NOTE: Once a timesheet has been approved by an Administrator, it can not longer be edited.

6. Error Messages

Error Message	Recommended Action
Error: Departure time cannot be before arrival time	Set departure time to after arrival time
Error: Arrival time conflicts with an existing timesheet entry	Change arrival outside the range of another timesheet entry for the same date.
Error: Departure time conflicts with an existing timesheet entry	Change departure time outside the range of another timesheet entry for the same date.