User Manual

TechEase

Daniel Ganter

Regina Raven

Michael McKeever

Nicholas Armocida

Jeremiah Washington

Table of Contents

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

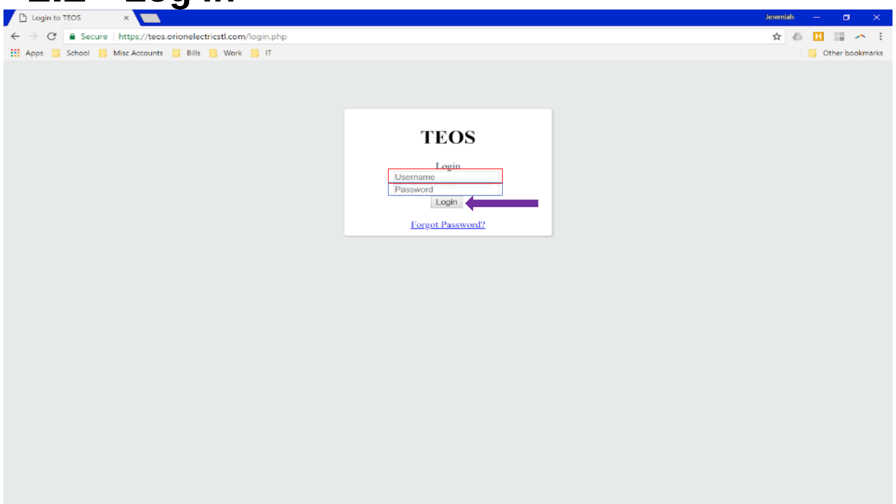
System Features	Basic	Service Technician	Administrator
Sign in/out	X	X	X
Employees Section			X
Create Employees			X
Reset User Password	X	X	X
Delete Employees			X
Timesheet Section	X	X	X
Submit Timesheet	X	X	X
Approve Timesheet			X
View Jobs			X
Create Jobs			X
Close Jobs			X
Customer Section			X
Create 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

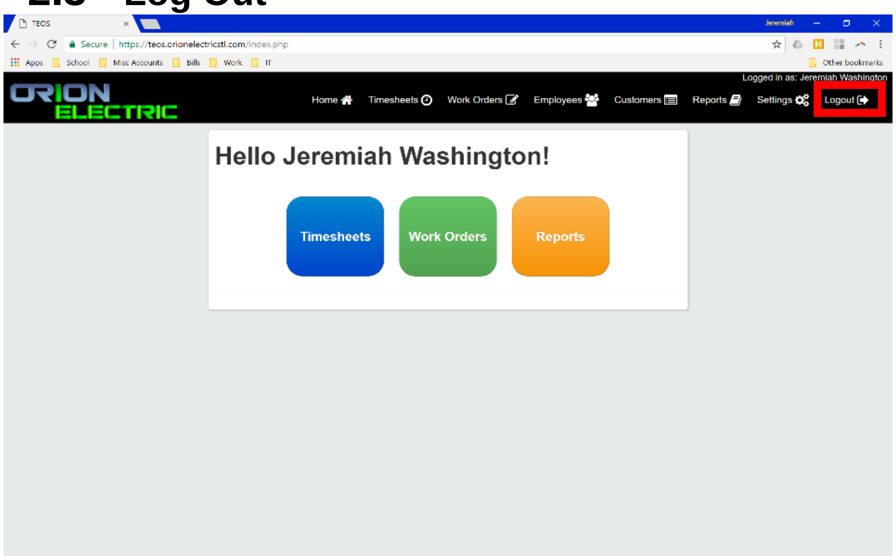
To access the TEOS website for logging in, it's recommended that you use the latest version of Google Chrome. Once you open your internet browser, enter this address in the search bar "https://teos.orionelectricstl.com/login.php" then press enter. The will take you to the TEOS log-in page. If this is 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



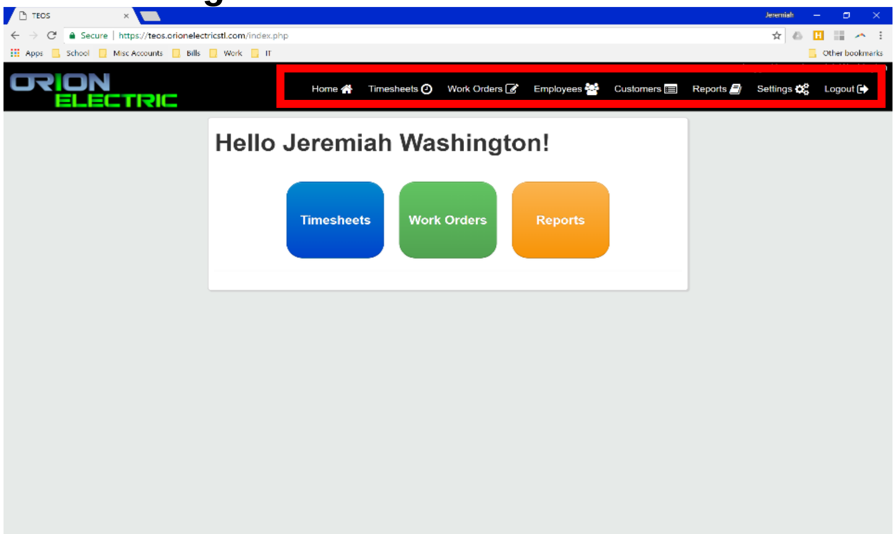
1. Enter your assigned username in the username field.
2. Enter your assigned password in the password field.
3. Click Login.

2.3 Log Out



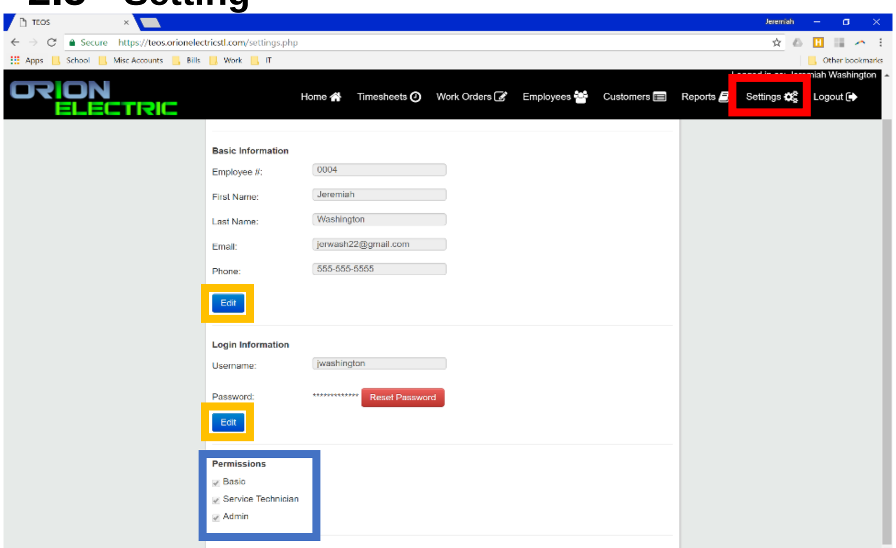
1. Click "Logout" located on the navigation bar to exit the program.

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



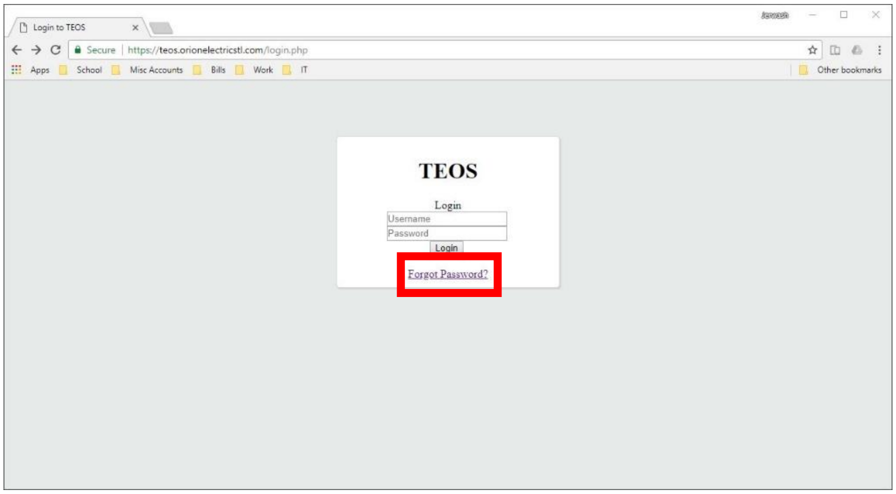
Note: Users can't change their own Employee #, first and last name or account type.

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.

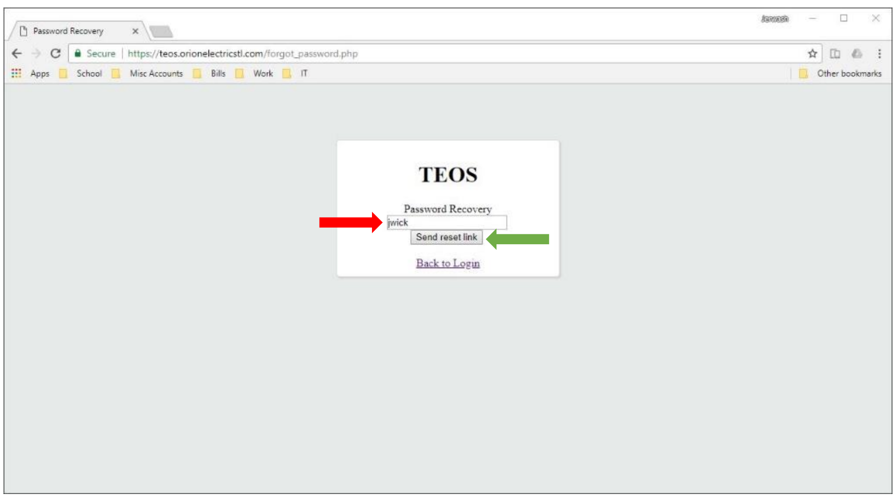
2.6 Resetting Password

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.

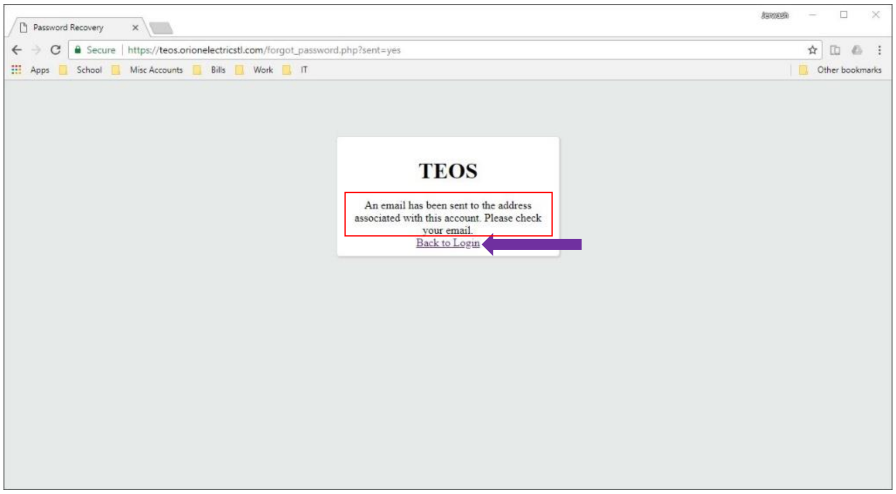
2.6.1. Forgot Password



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

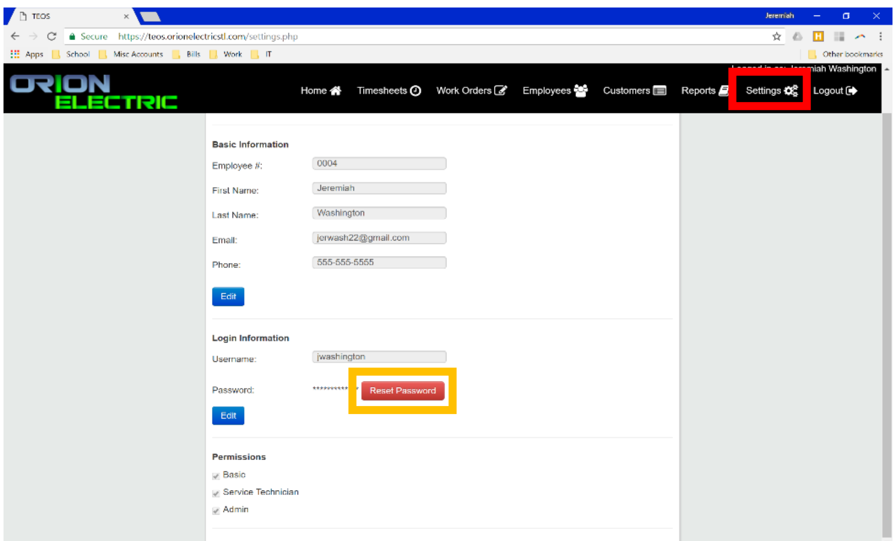


3. Click on the empty text field and enter your username
4. Click "Send Reset Link".

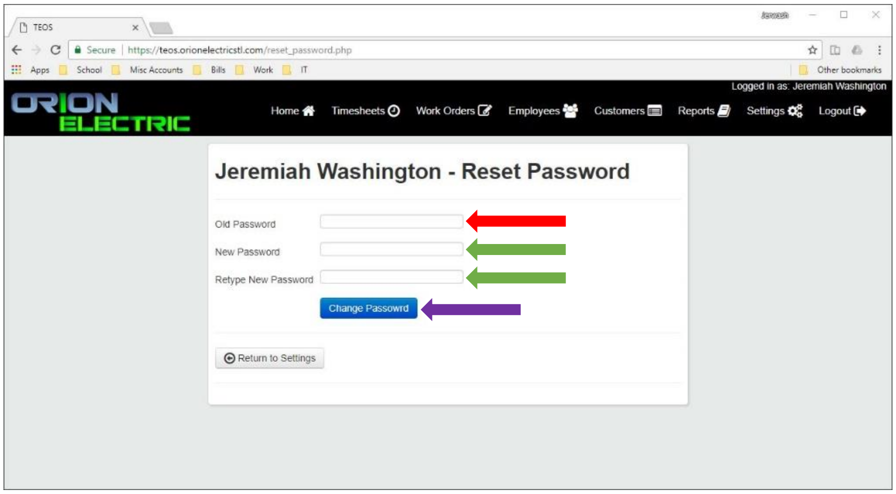


5. A confirmation will appear that an email has been sent to the user's associative email.
6. Click the "Back to Login" link to return to the login screen.

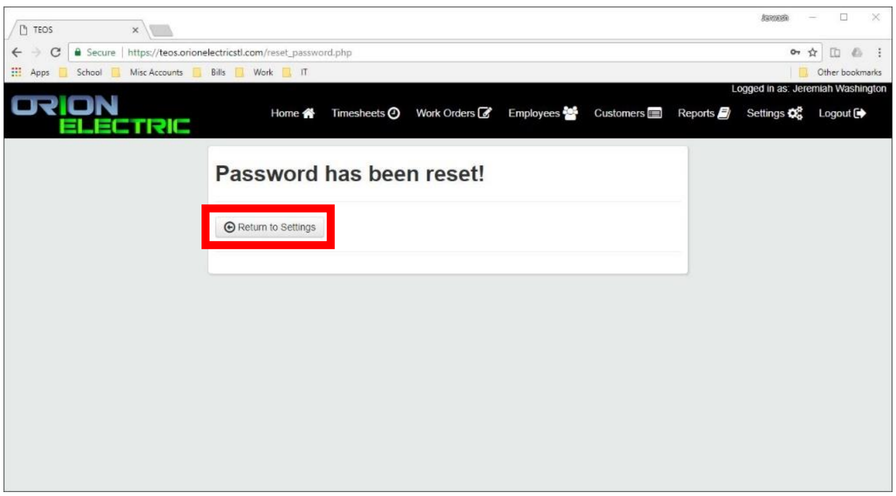
2.6.2. Reset Password



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



3. Enter you old Password
4. Enter your new Password
5. Retype your new Password
6. Click the “Change Password” button to finalize the changes.



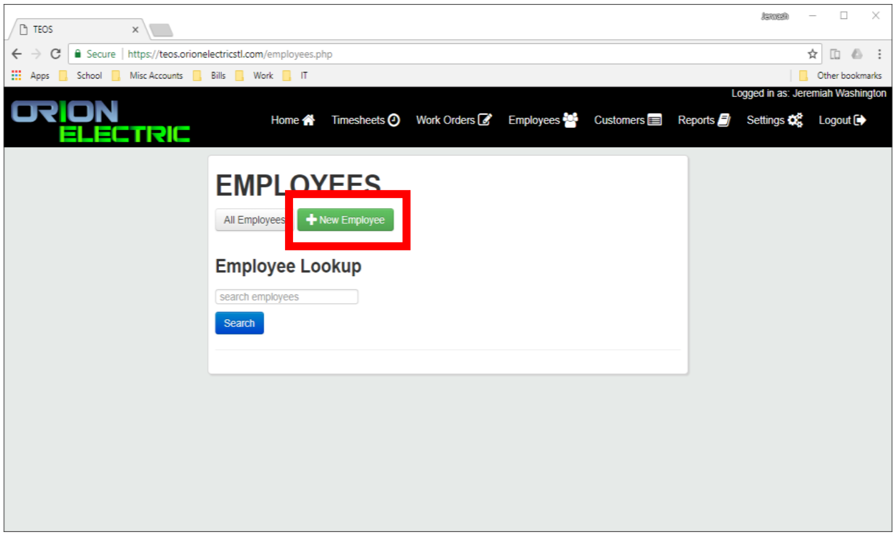
7. A confirmation will appear.
8. Click the “Return to Setting” button to return to the Setting main page.

3. Administrator Account

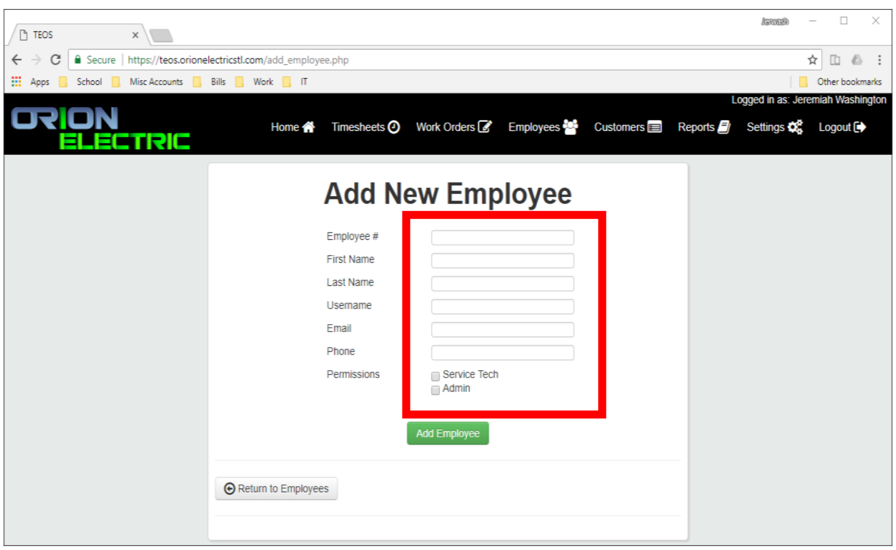
Administrator accounts have the highest access within TEOS. They have the ability to create employees, customer, work orders, jobs and modify timesheets. This section will provide a walkthrough of all the administrator functions.

3.1 Employees Section

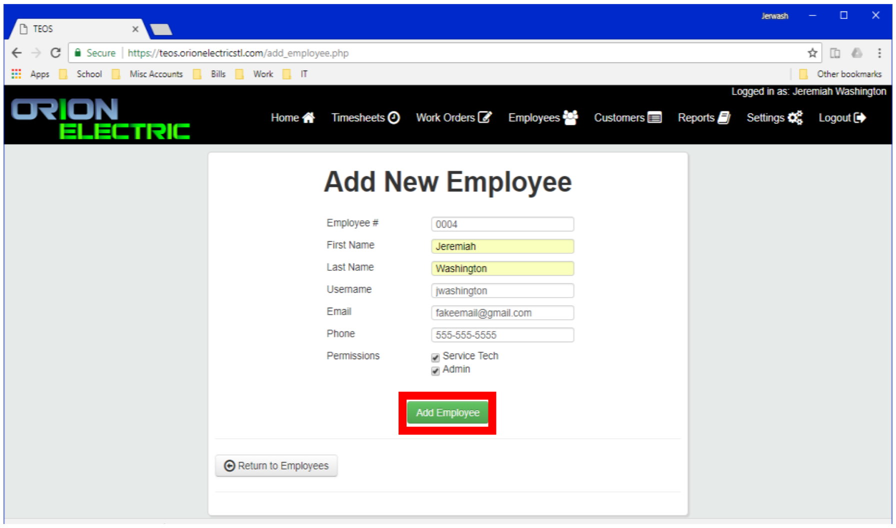
3.1.1. Create New Employees



1. Click on the Employees section to access the employees home page.
2. Click on the button label "New Employee".



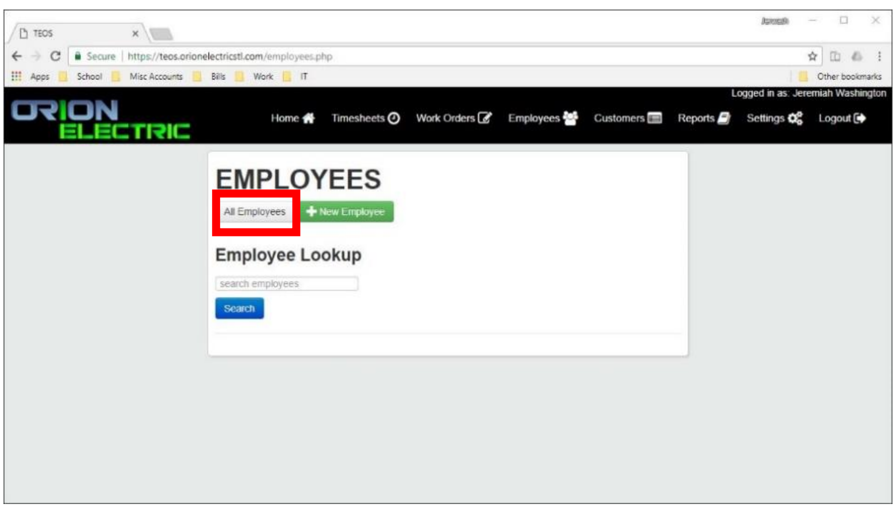
3. Enter a unique Employee number. This number is used to identify the employee within TEOS.
4. Complete the remaining form while also providing a unique username. This username will be how the employee logs into TEOS (See Section 2.2).



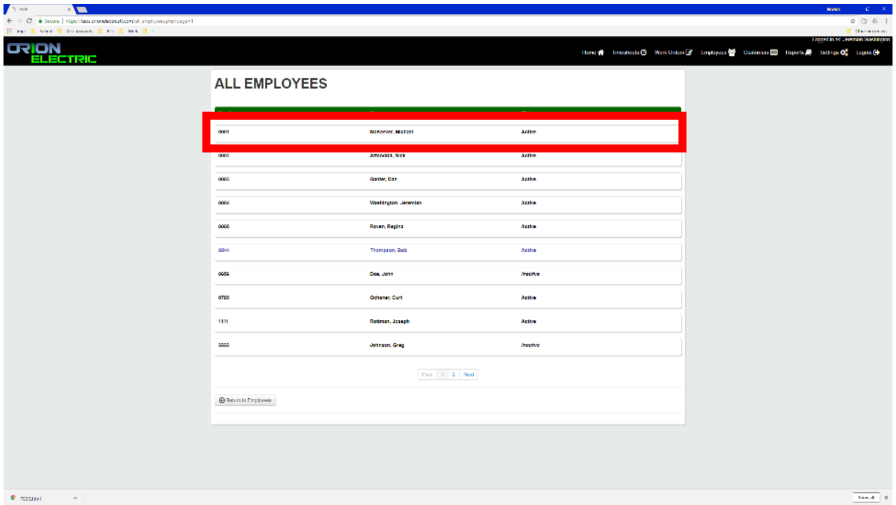
5. Select whether the new employee is a Service Tech, Admin or both. Selecting neither will grant account "Basic" permission. This will grant permissions to the user to access and modify certain information.

6. Click "Add Employee" to finalize the entry.

3.1.2. View All Employees



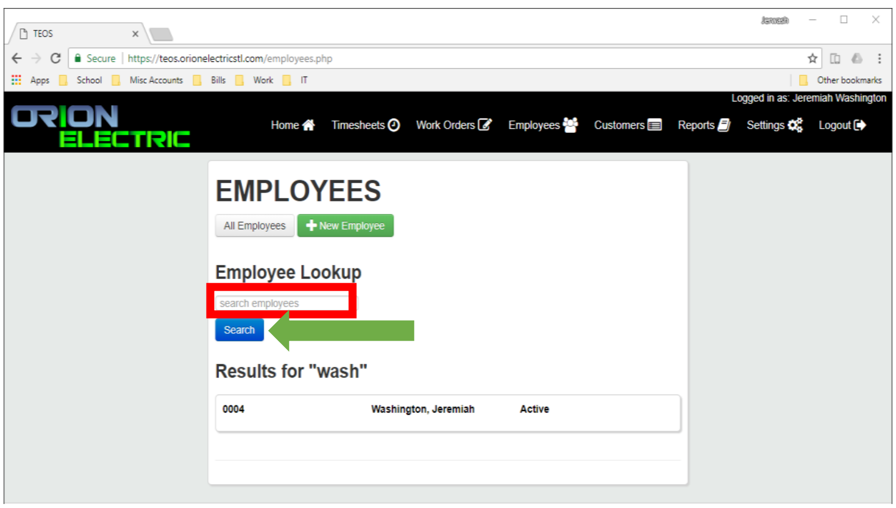
1. To view all Employees, click on the "All Employees" button.



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

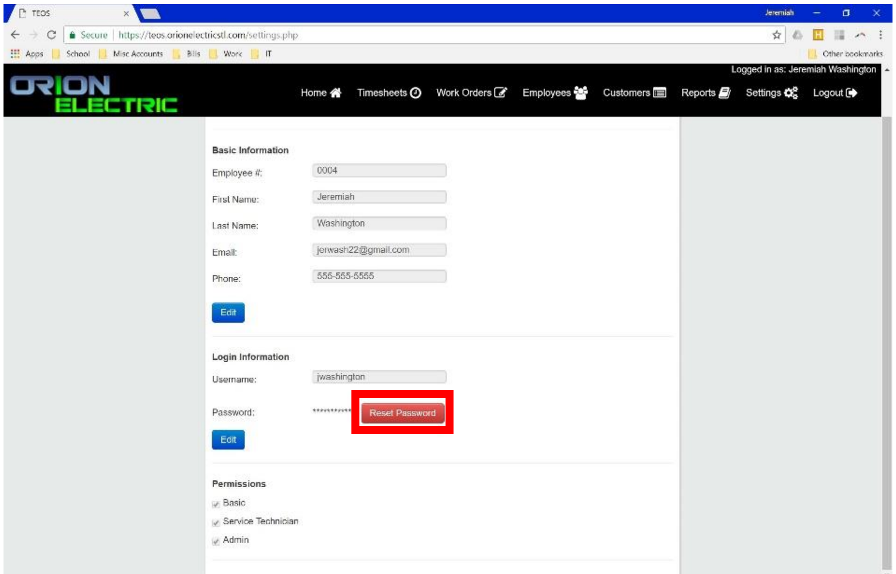


1. TEOS allows for the search of employee from within the Employees section.

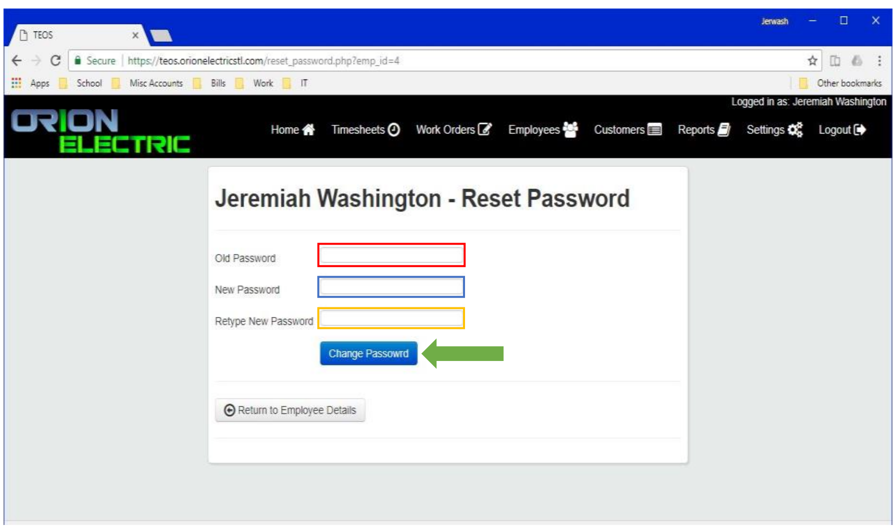
2. To search for employees, enter "last name, first name" or part of the last name or first name and click "Search".

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

3.1.4. Resetting Users Password



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

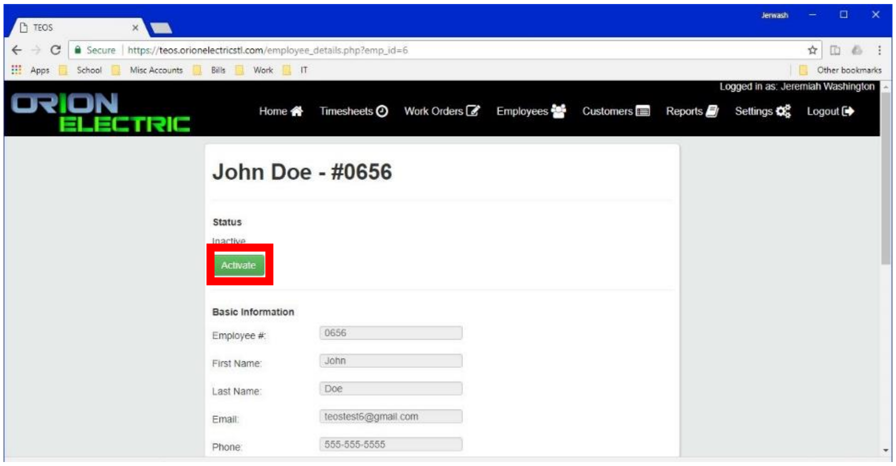


2. Enter the old password.

3. Then enter the new password.

4. Retype the new password then click "Change Password"

3.1.5. Account Activation

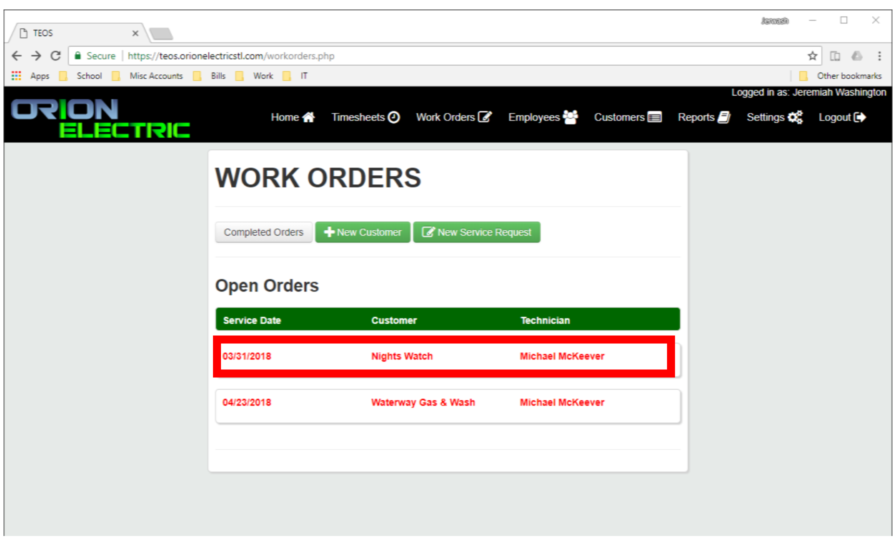


1. To Activate or Deactivate and employee account select the employees record then click the button marked “Activate” or “Deactivate”.

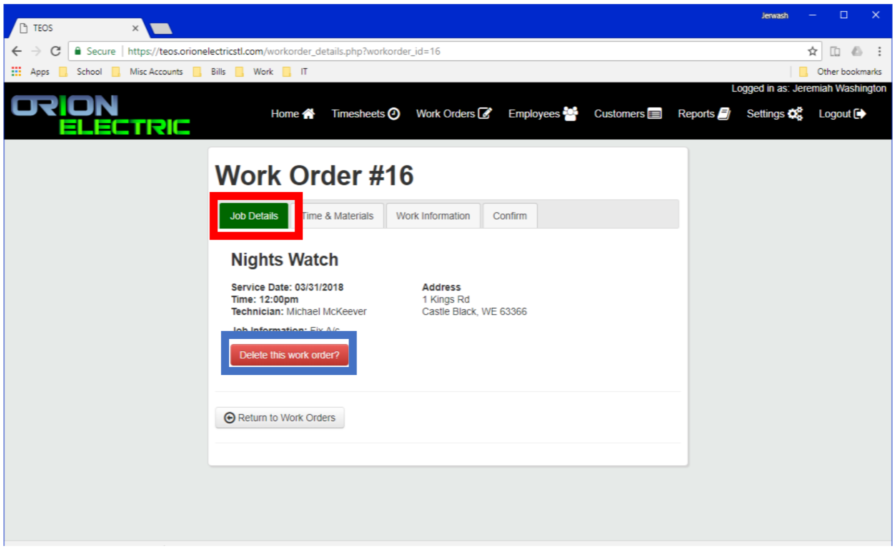
Note: Employees can’t be permanently deleted, however they can be deactivated thus having all their access privileges revoked.

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.



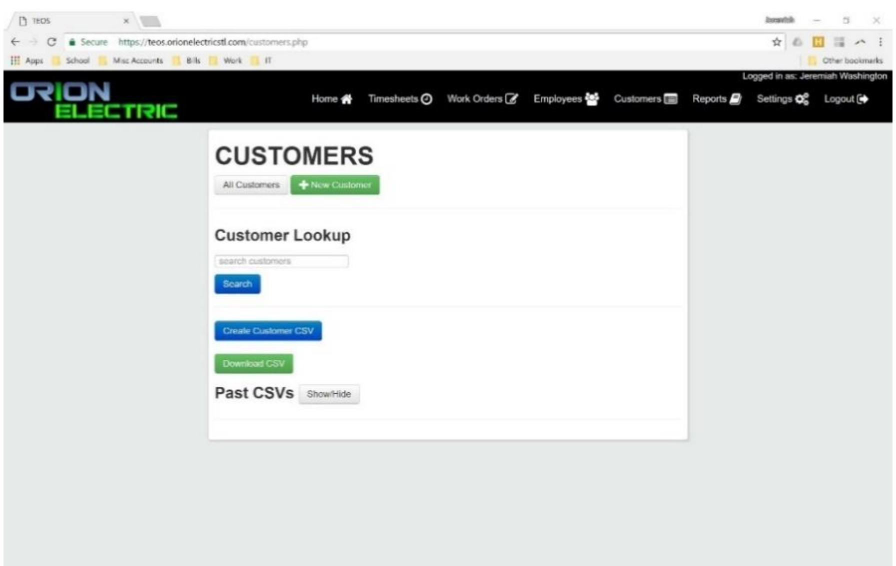
2. In the Job Details tab, click the "Delete this work order?" button.

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

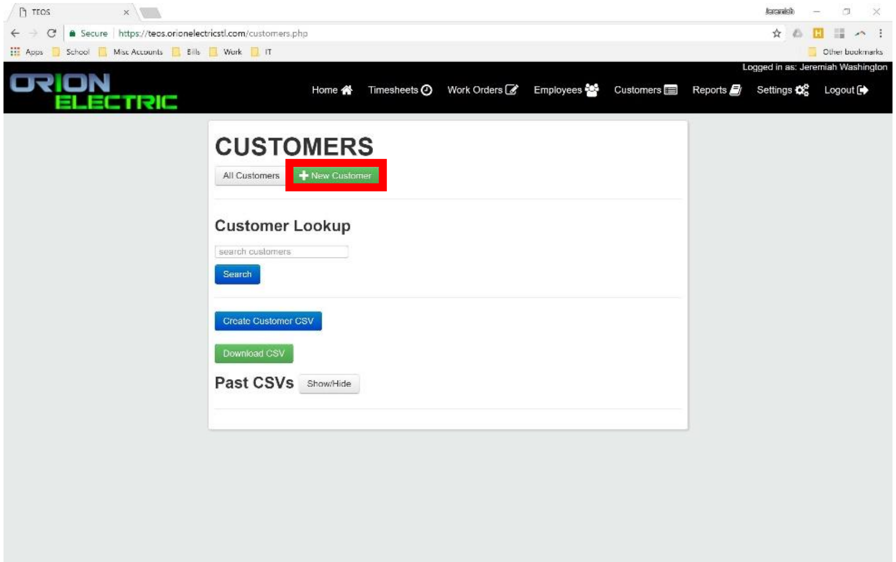
The "Customers" section contains information about clients that have been added to the TEOS program. Administrators are the only users that have the power to deactivate or otherwise modify any customers.

3.3.1 Customer Section

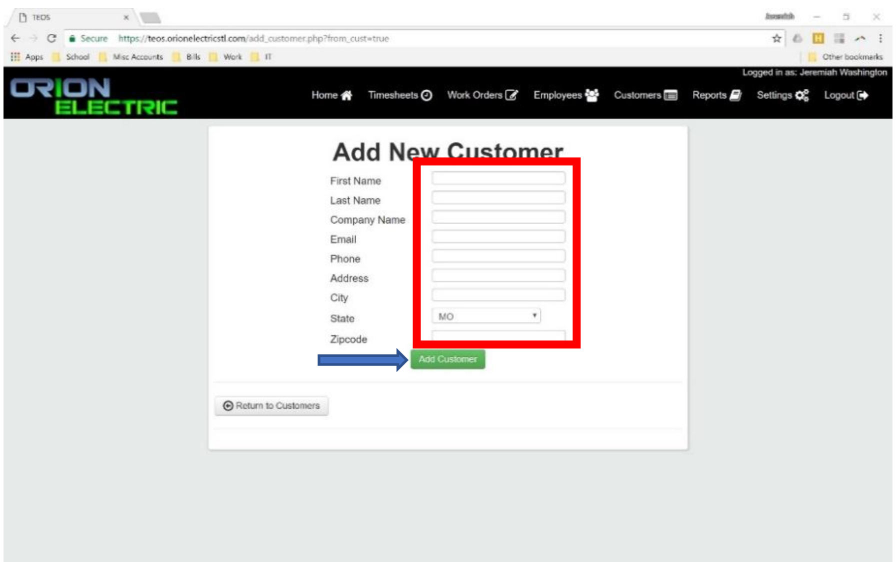


1. This is the main screen of the Customer section. From here, those with proper access can see all the customers, create new customers, search for customers with the database and download a list of current customers.

3.3.2 Create New Customer



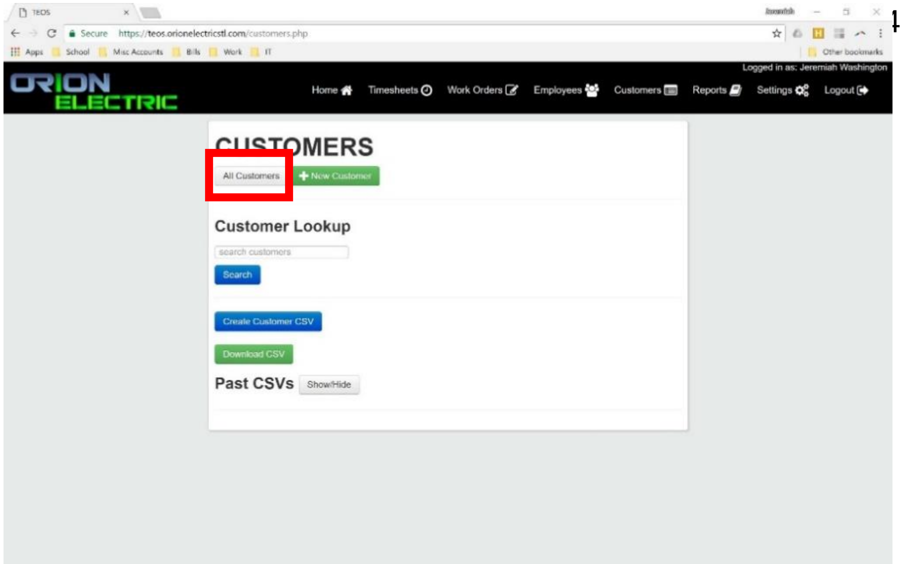
1. To create a new Customer, first click on the "New Customer" button.



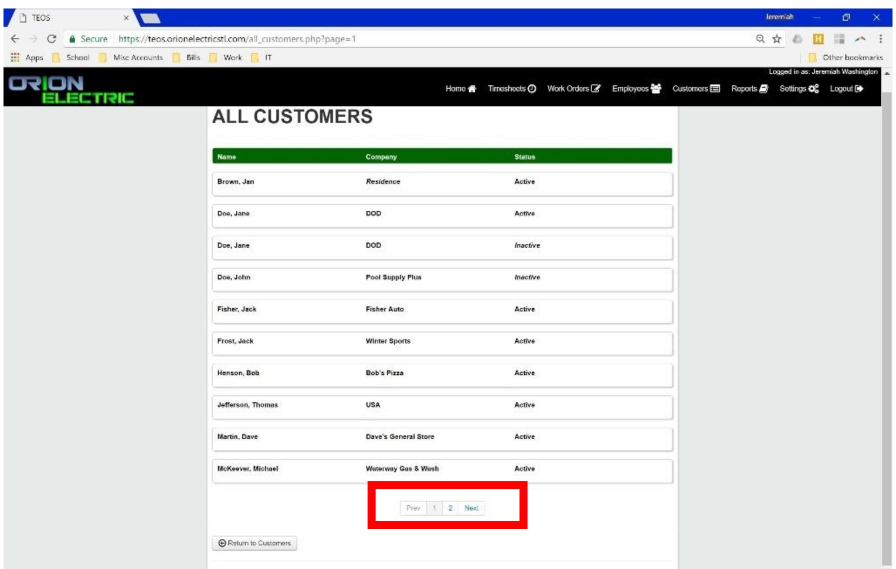
2. Accurately fill out the all fields.
3. Click "Add Customer" once all the fields are completed.

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

3.3.3 View All Customers

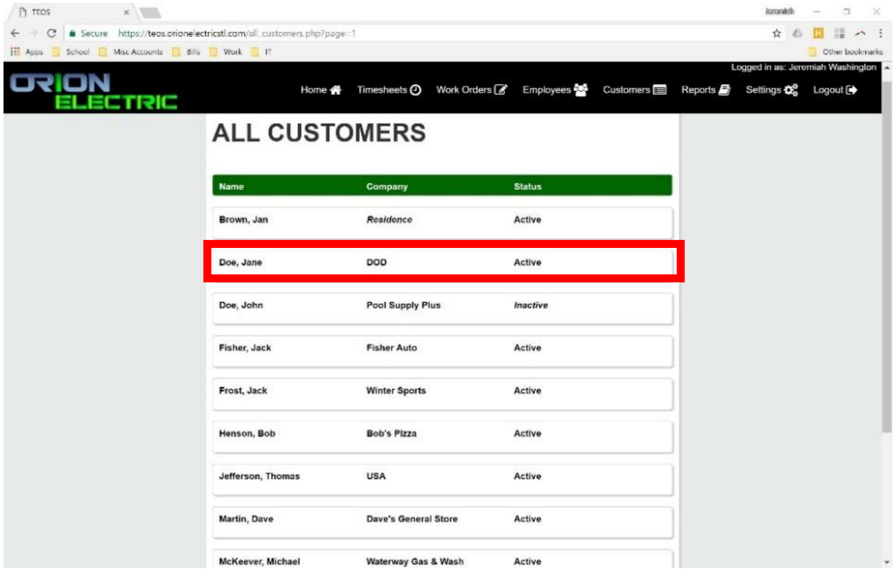


4. To view all Customers, click on the “All Customers” button.

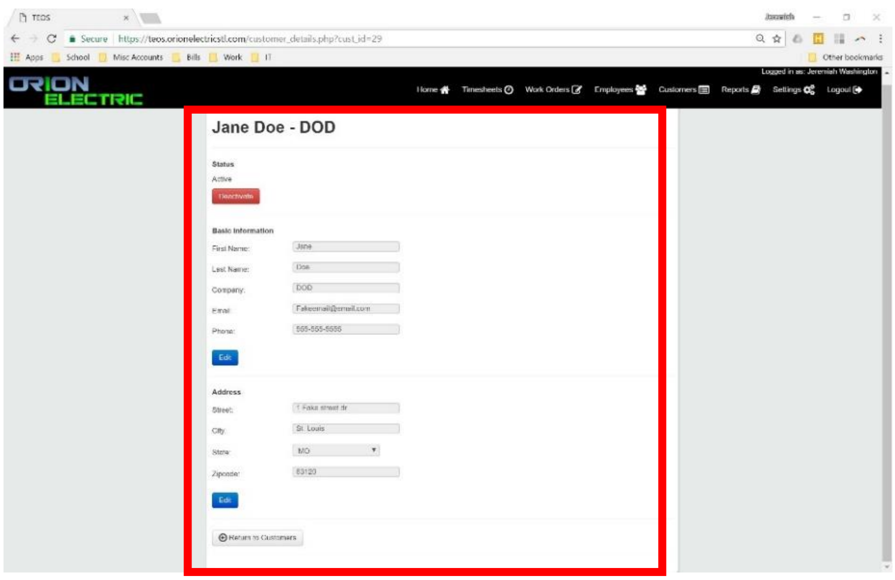


5. All Customers will be viewed in alphabetical order by default.
6. Click the “Next” button or number located at the bottom of the page to advance through the list of customers.

3.3.4 View Customer Details

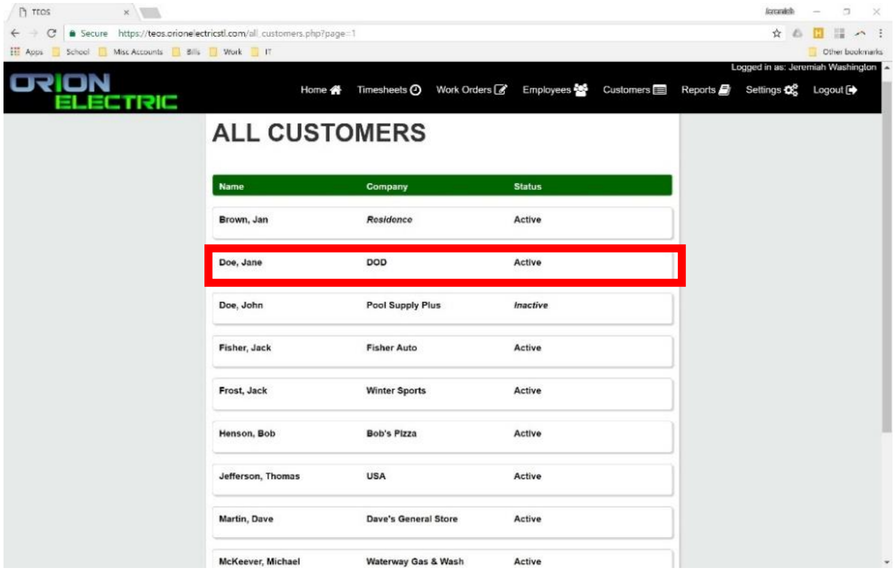


1. To view customer details such as, email, phone number, or address, select the desired customer's record from the "All Customer" view or a "Customer Lookup" (See Section 3.3.7).

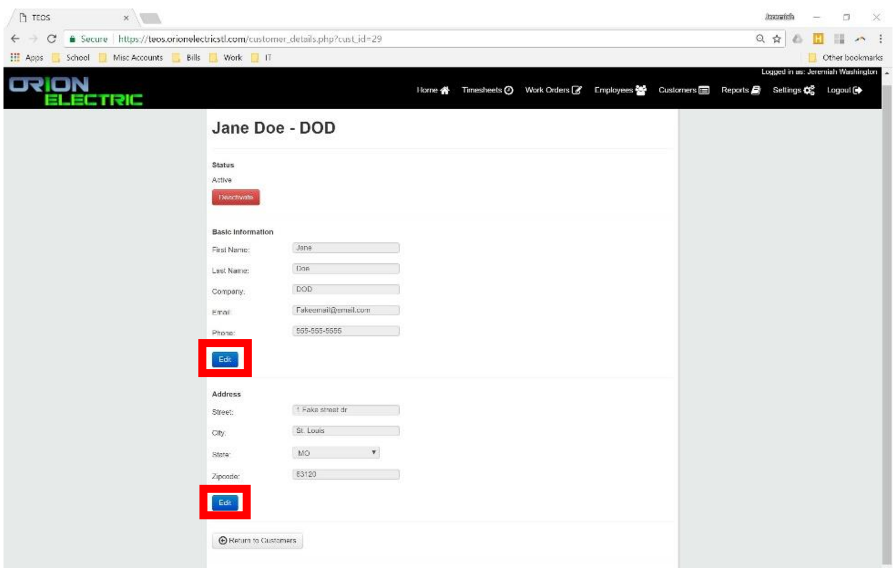


2. Once the desired record is selected, the Customer detail page will be displayed, show varies information you've save about the customer.

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).

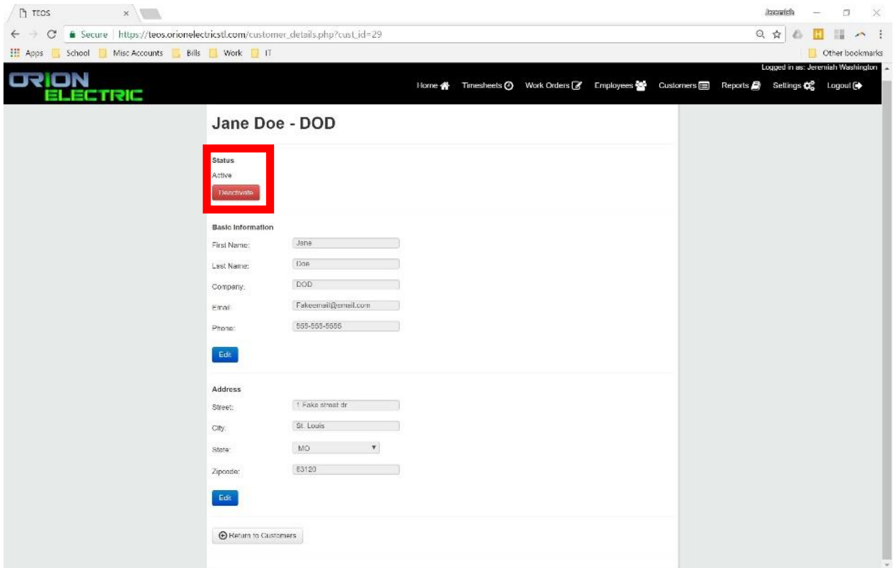


2. The customers record will then be displayed.

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.

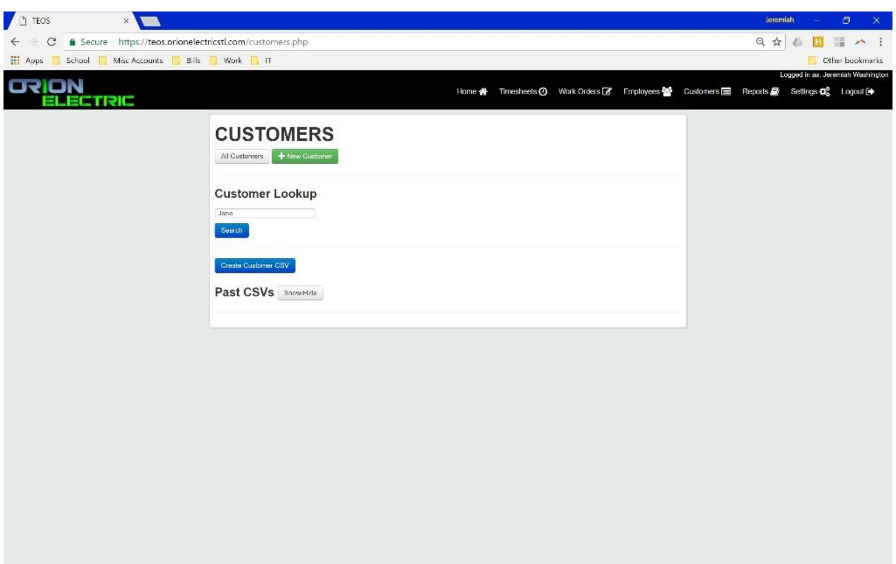
3.3.6 Customer Status



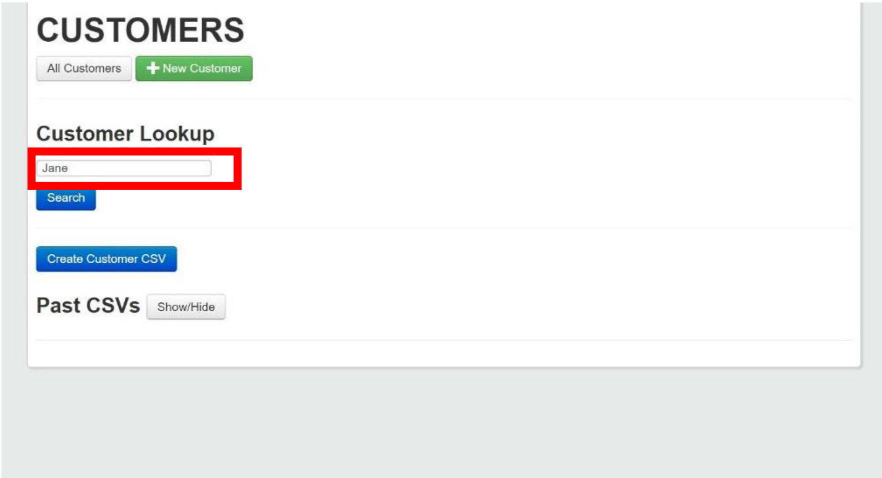
Note: Customers who have open Work Orders, cannot be set to “Inactive”. The Work Order must be completed first ([See Section 4.1.1.5).](#)

1. A customer’s status is a very important feature within the TEOS program.
2. A Customers status indicated 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

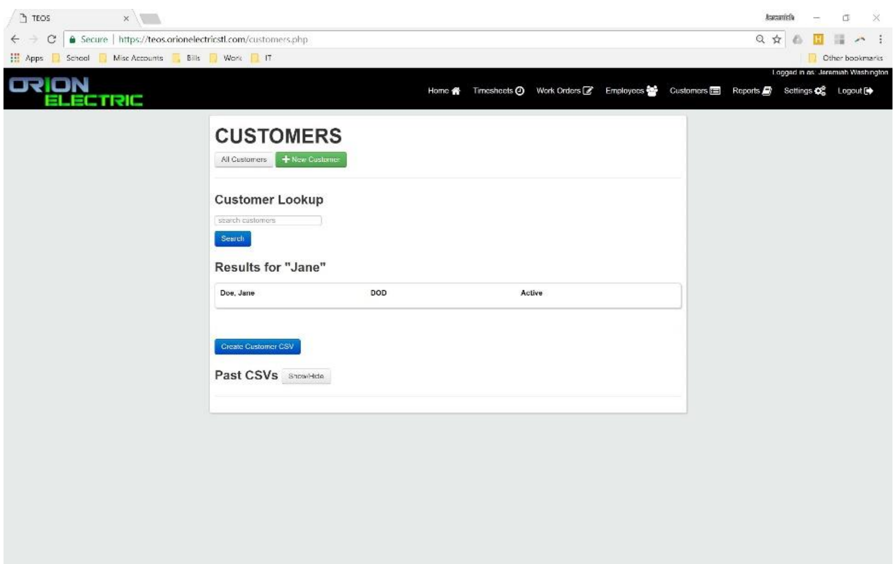


1. To search for customer, first click on the “Customers” tab to access its main page.



2. 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”.

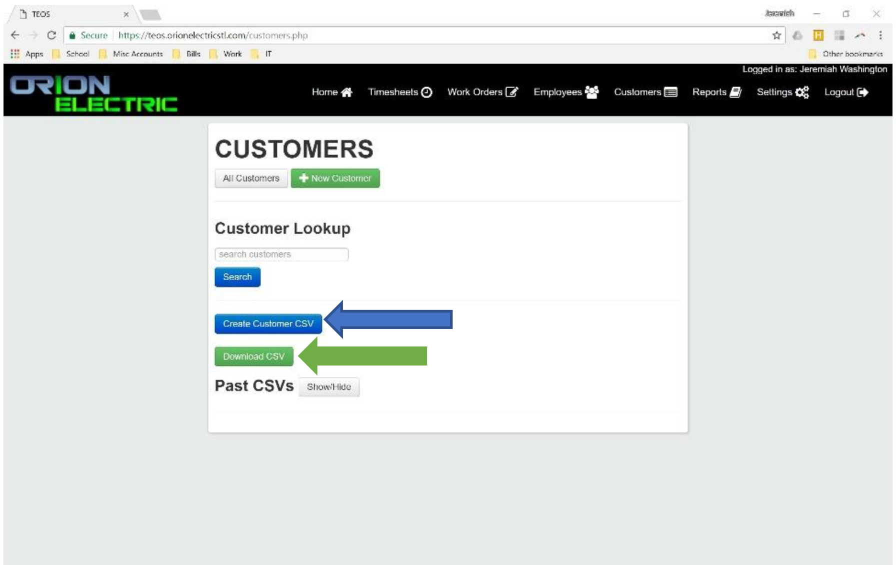
Note: When using customer look up, if you know the customer’s full name, search by either the first name or the last name not both. The system will not return a search such as, “Jane Doe”



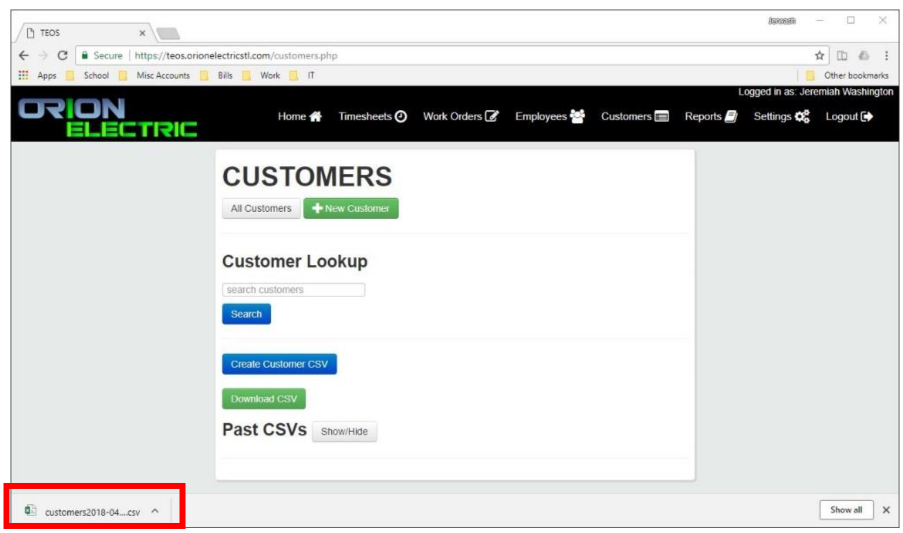
3. The results will show the records that either exactly or partially match your search word.

3.3.8 Download Customers as CSV

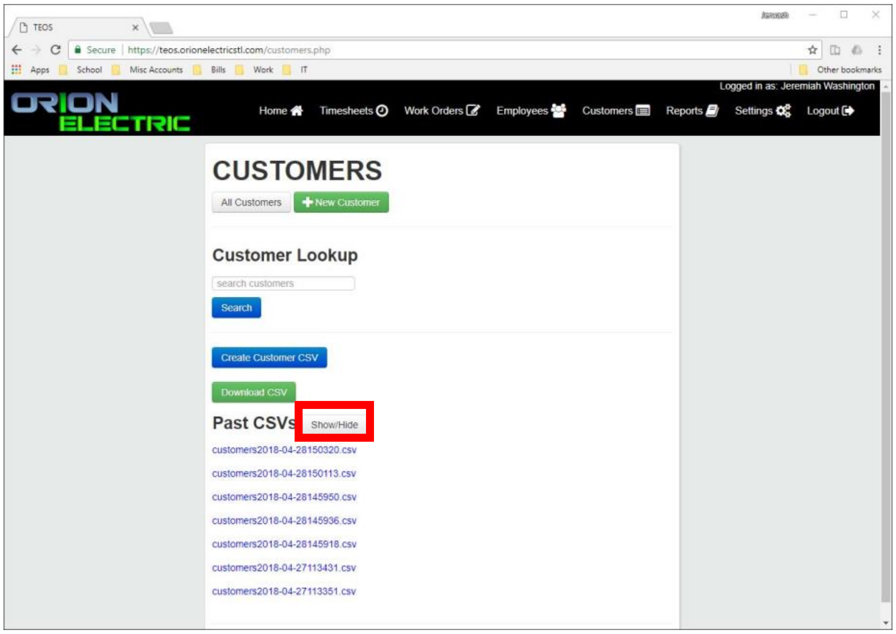
This feature exports a .csv file containing all customers added to TEOS since the last download. The purpose of this feature is to allow for a continuous and non-duplication of customers to be upload to other programs.



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.

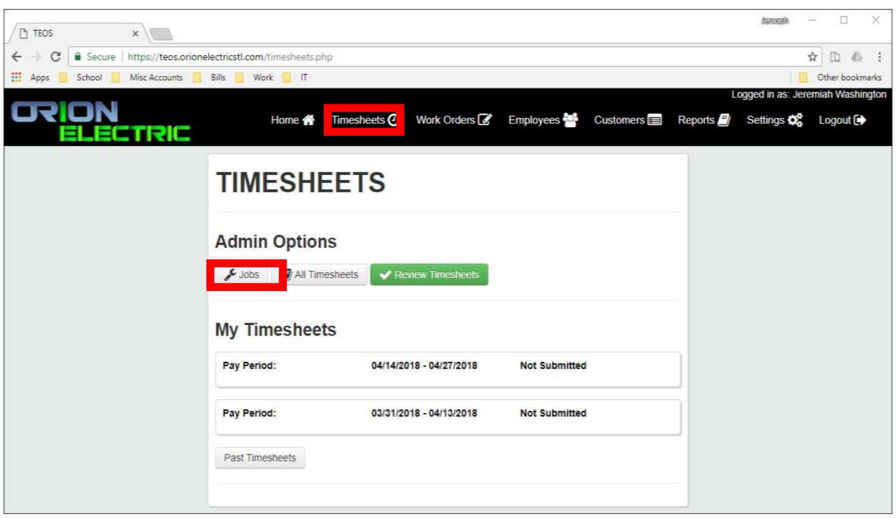


5. To download past .csv, click the "Show/Hide" button, then click on the desire file, using the date and time to identify the files.

3.4 Jobs

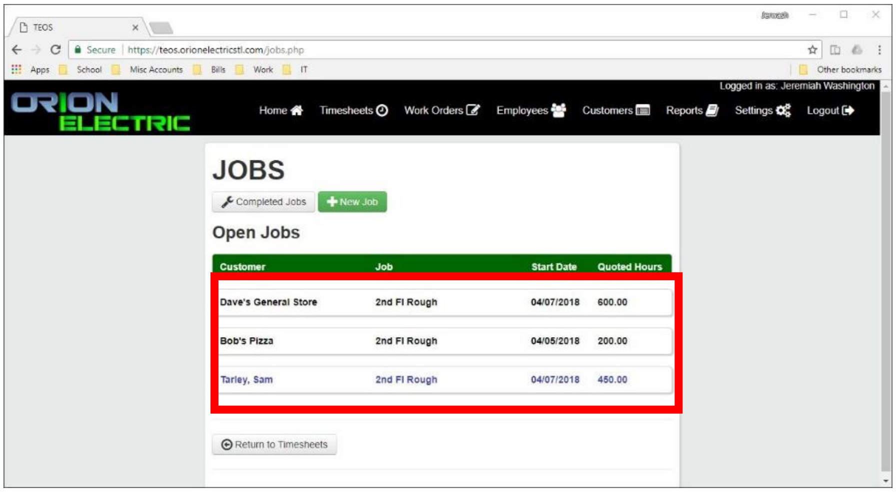
The Job function allows particular project to be attached to Customer records for the purpose of assessing job cost.

3.4.1. Access Jobs



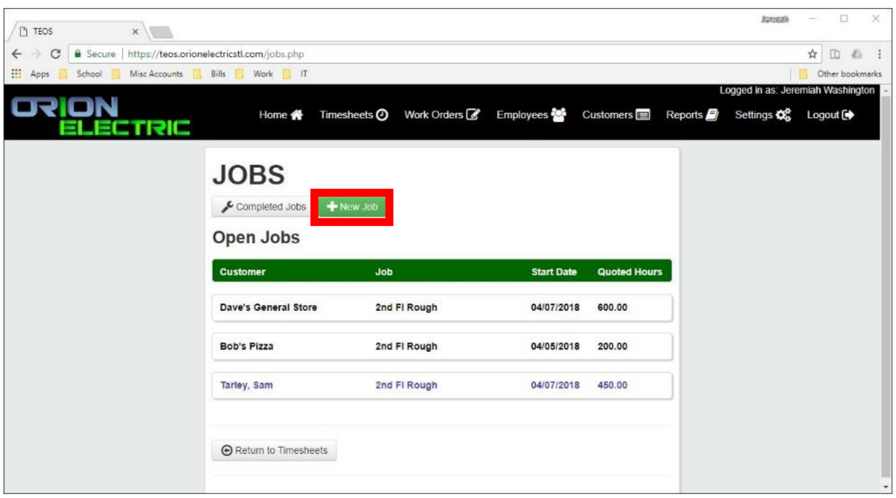
1. To access Job, click on the Timesheets section, then click on the "Jobs" button

3.4.2. View Open Jobs

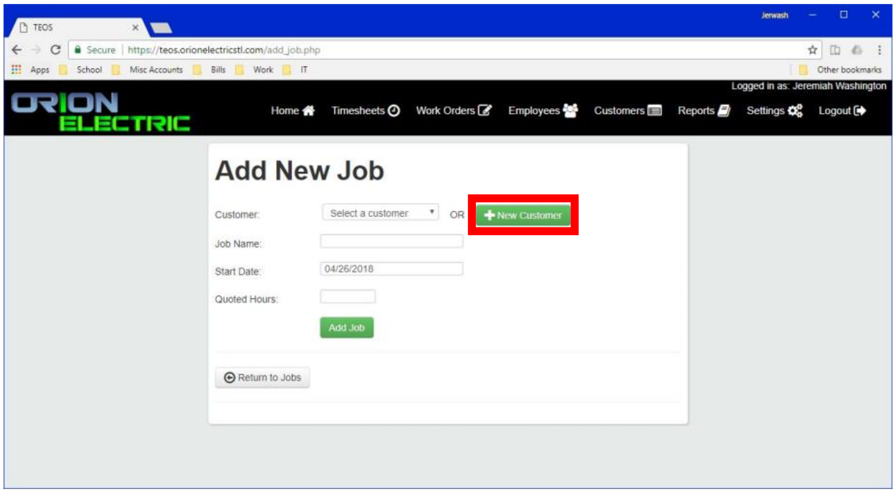


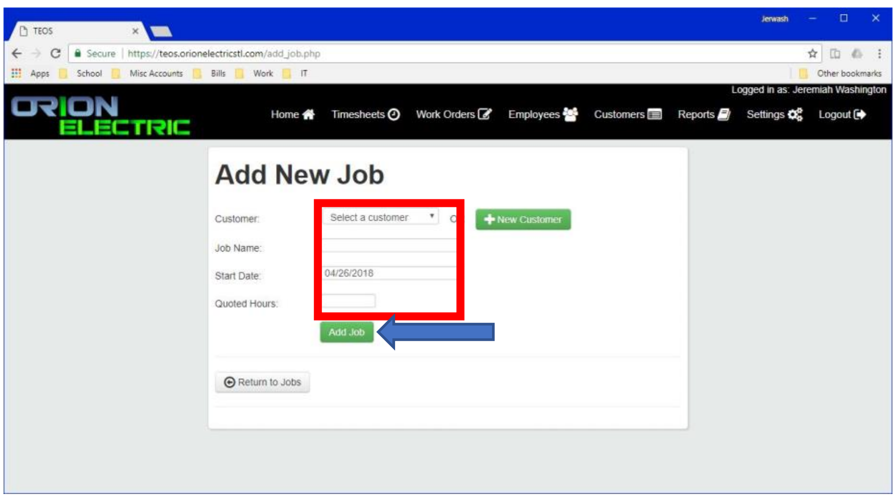
1. Completing the steps in Section 3.1.4 will display the main “Jobs” page.
2. On this page, you will see a list of all Jobs currently open.

3.4.3. Create New Job



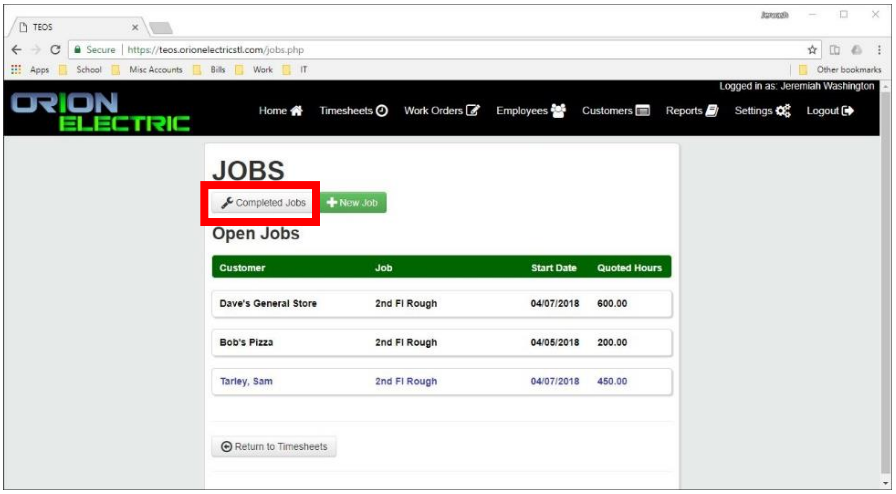
1. To create a job, click on the “New Job” button from the Jobs, main page (See Section 3.4.1).



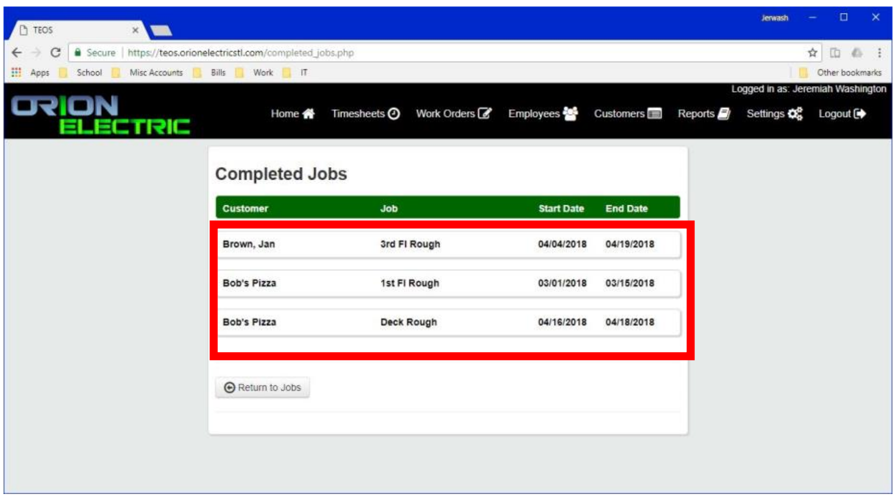


2. Once you've accessed the "Add New Job Page", complete the field as accurately as possible.
3. This job will be linked to a Customer within TEOS. If the Customer doesn't exist, refer to Section 3.3.2 for instructions on how to "Create a New Customer".
4. If the Customer does exist, select the customer 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.

3.4.4. View Completed Jobs

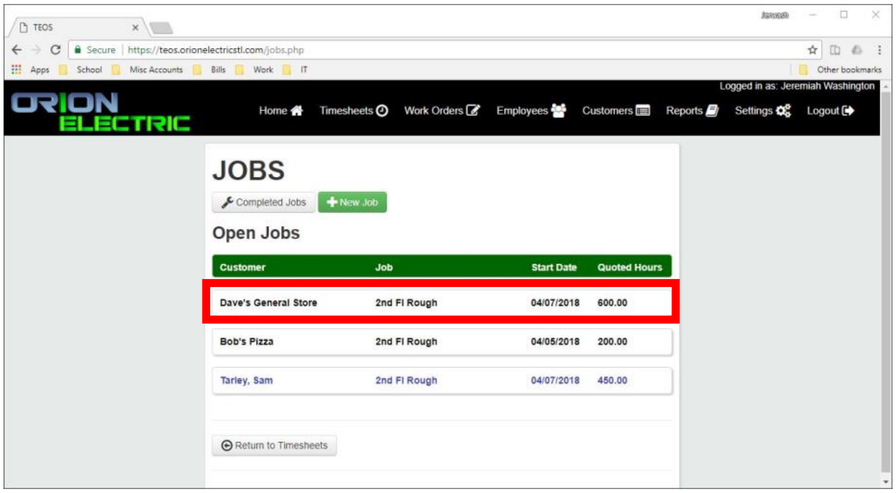


1. To view completed jobs, go to the jobs main page and click “Completed Jobs”.

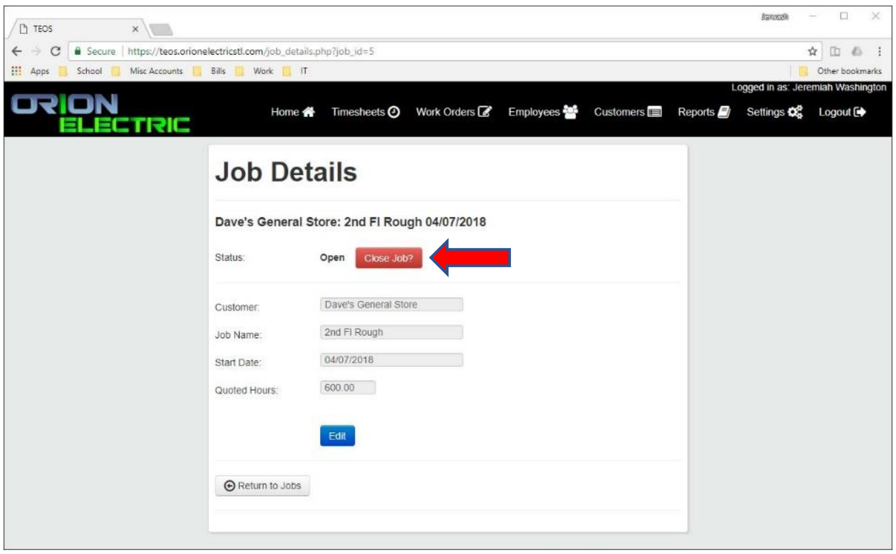


2. The Complete Jobs page will list Job that have been completed, meaning, they have been closed and an “End Date” has been assigned. See Section 3.4.5 for instructions on how to close a job.

3.4.5. Close Job

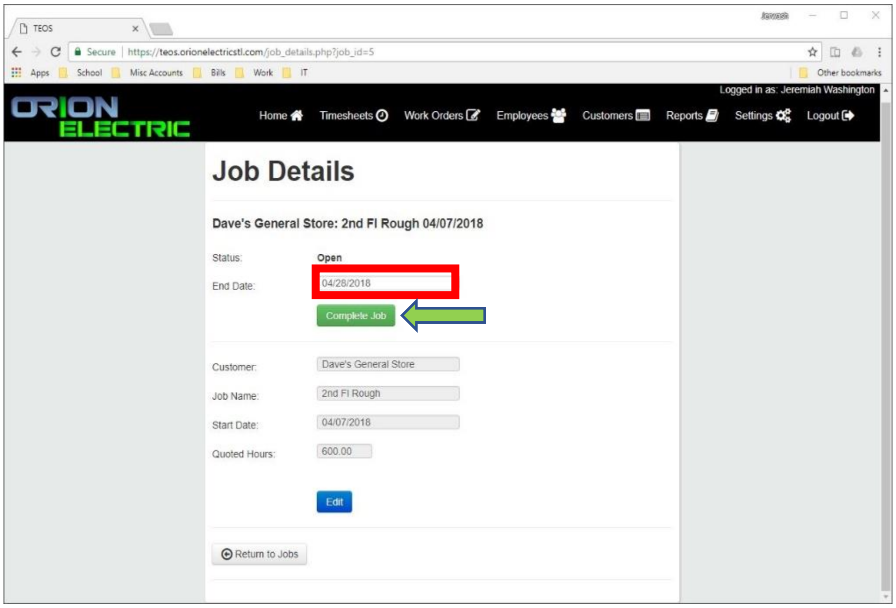


1. To close a job, first navigate to the "Open Jobs" main page ([See Section 3.4.2)](#).
2. Once on the Jobs main page, select any record to display the details of that record.



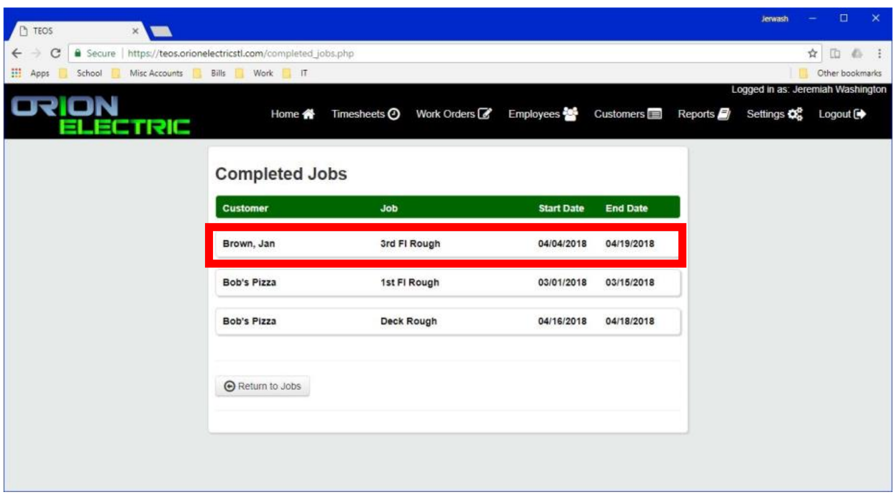
3. Once on the "Job Details" page, click the "Close Job"

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.



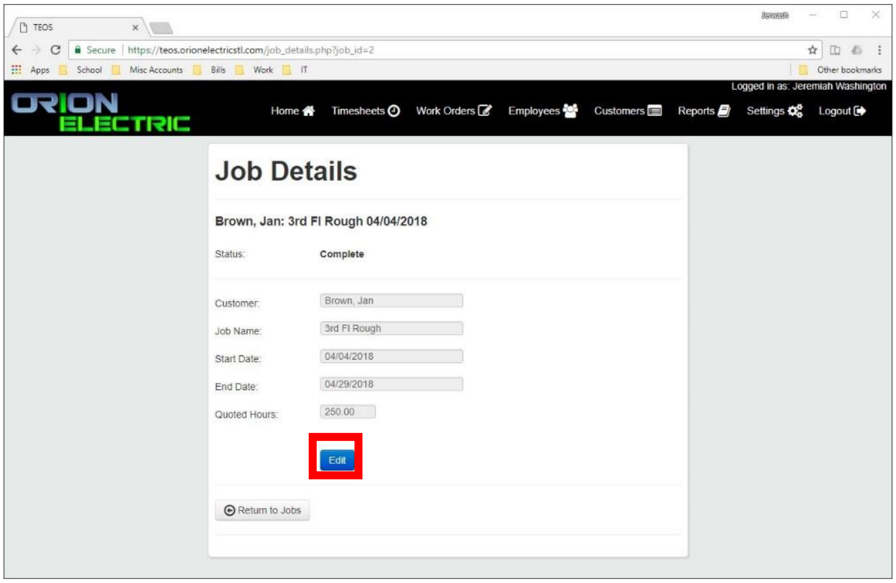
4. After you clicked the "Closed Job" button enter an "End Date"
5. Then click "Complete Job" to finalize the closure.

3.4.6. Edit Job

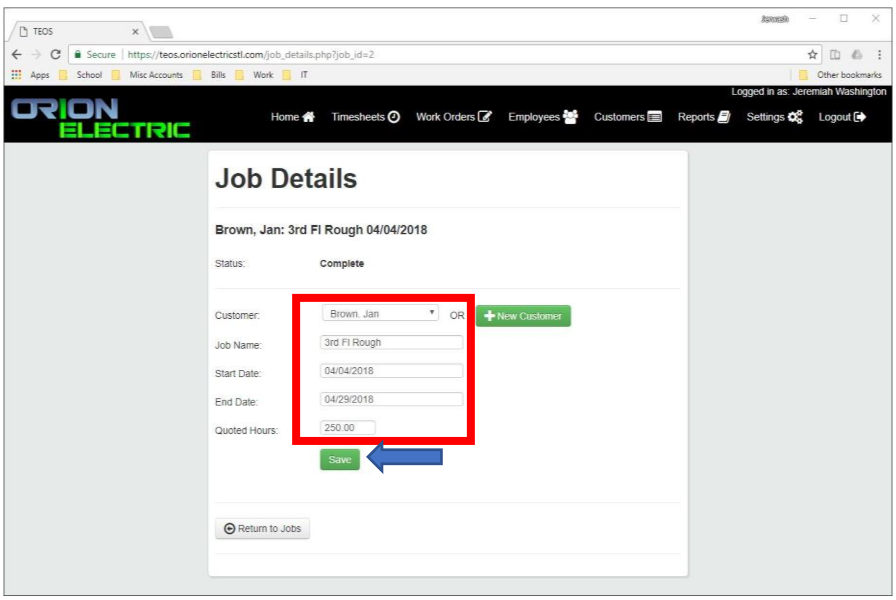


1. To edit a Job, you must first access the job's record. Administrators have the ability to edit both open and completed jobs.

2. Then select the record you want to edit.



3. Once the record is open, click the "Edit" button to allow the fields to be modified.

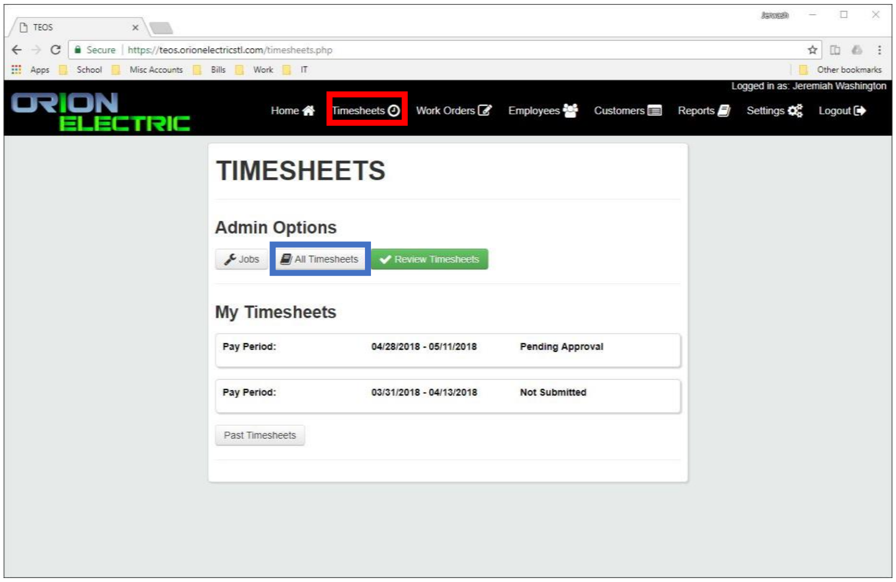


4. You can now edit and of the fields, including the "End Date" if this record is complete.

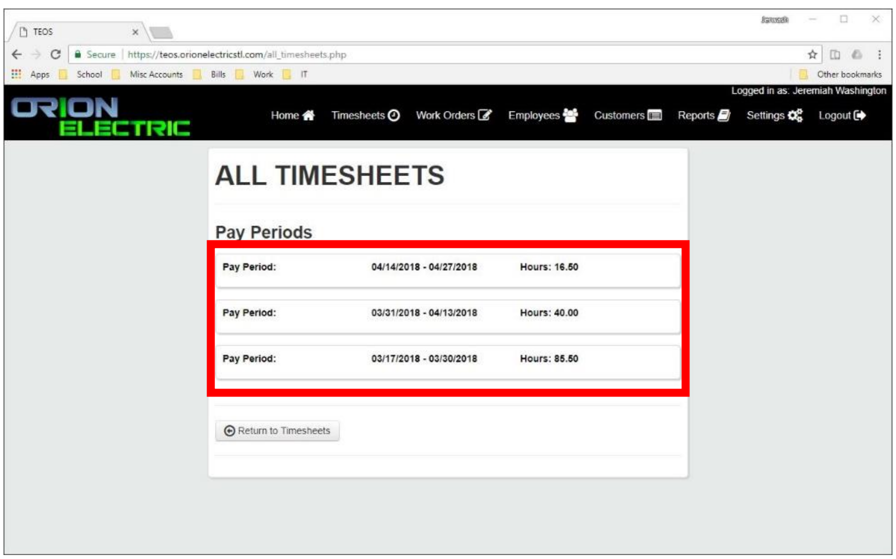
5. Once you have edited the necessary fields, click the "Save" button to finalize the changes.

3.5. Timesheets

3.5.1. View All Pay Periods

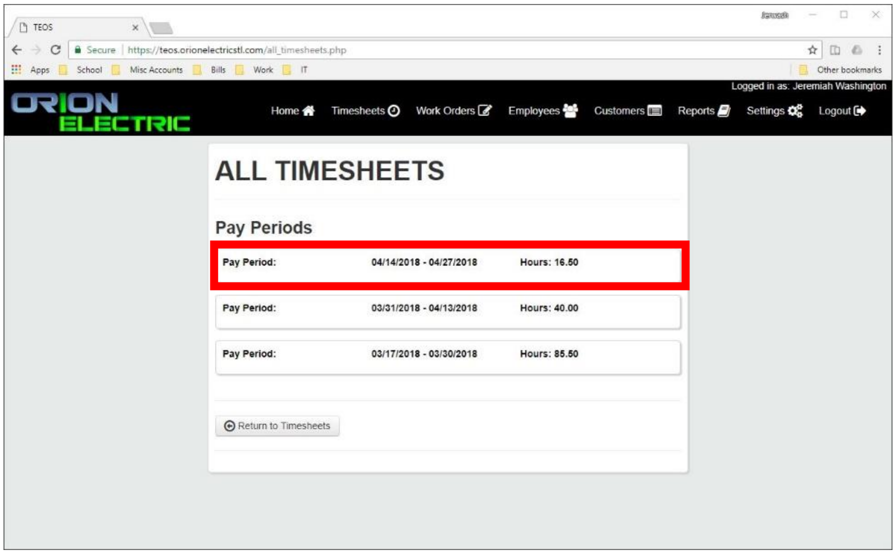


1. To view the current the current and all non-approved Pay Periods, navigate to the Timesheet section then click on "All Timesheets".

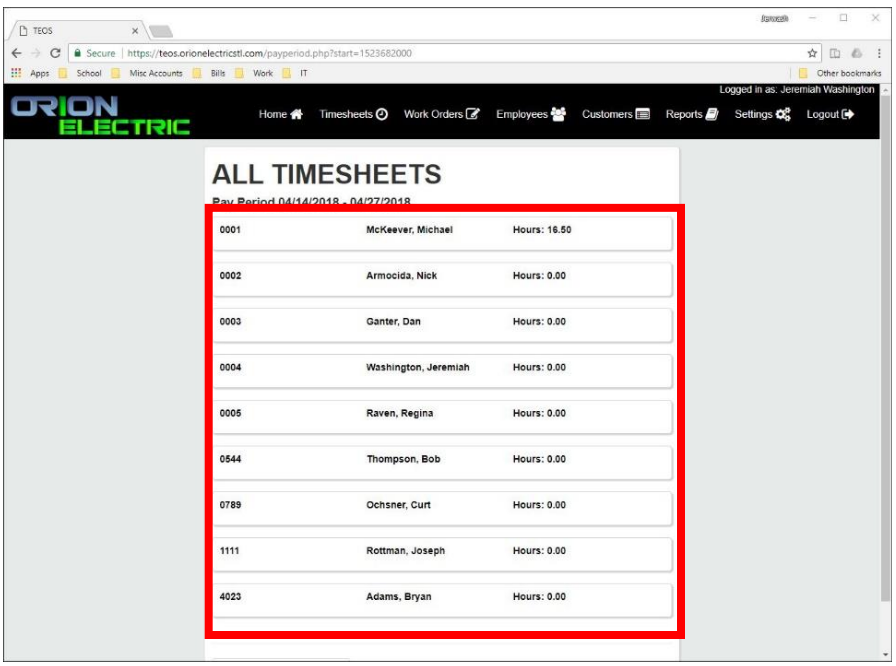


2. Once you click on "All Timesheets" you will see all the pay periods in descending order.

3.5.2. View Timesheets Within Pay Period

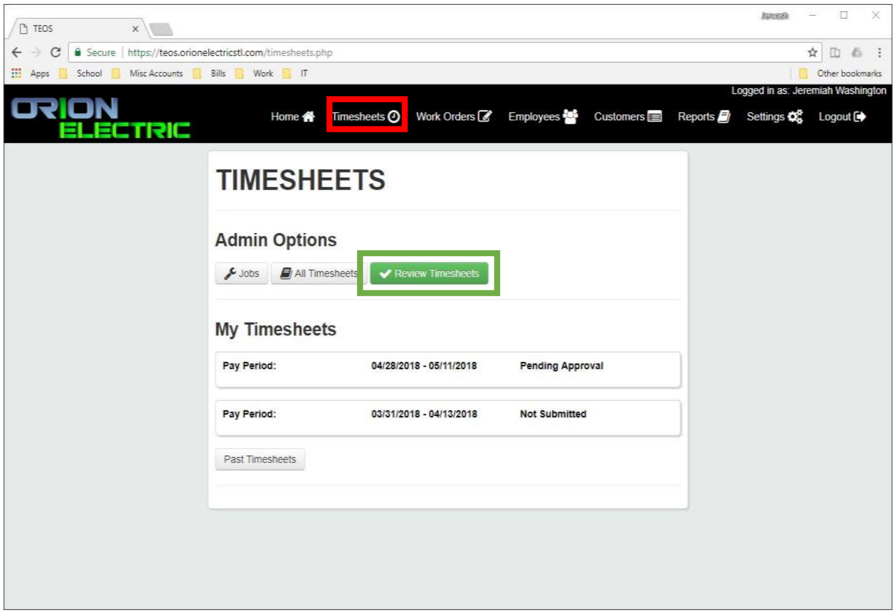


1. See Section 3.5.2 to navigate to this point. To view all Timesheet within a pay period, Select the desire record.

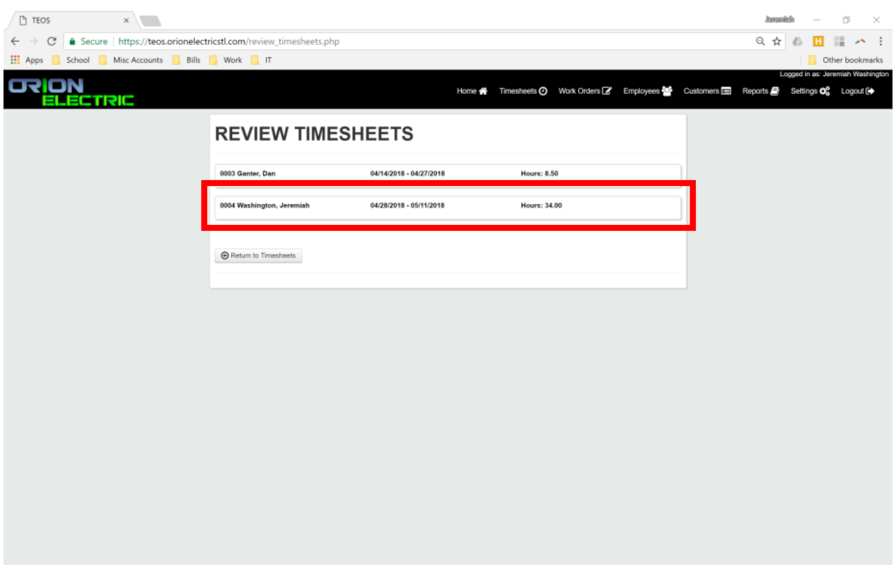


2. Once the pay period record is selected, a list of all timesheets created during that pay period will be generated.

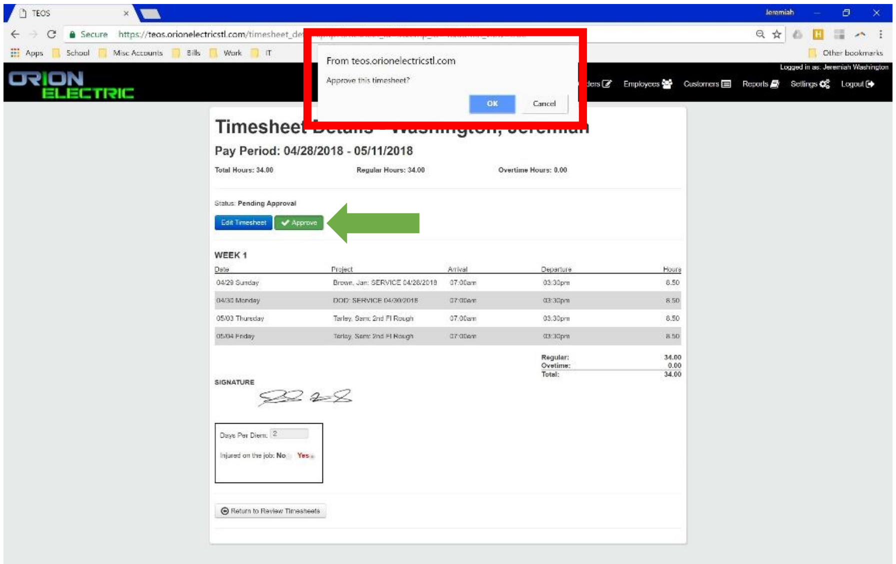
3.5.3. Review & Approve Timesheets



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".



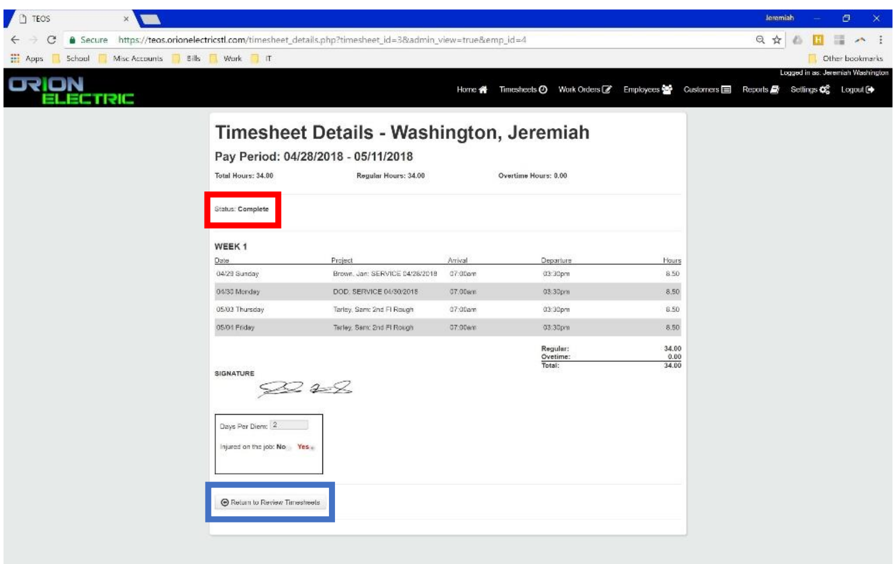
3. The. "Review Timesheets" page will list timesheets that have been submitted for any pay period but not yet approved.
4. Select the timesheet record you wish to review.



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.

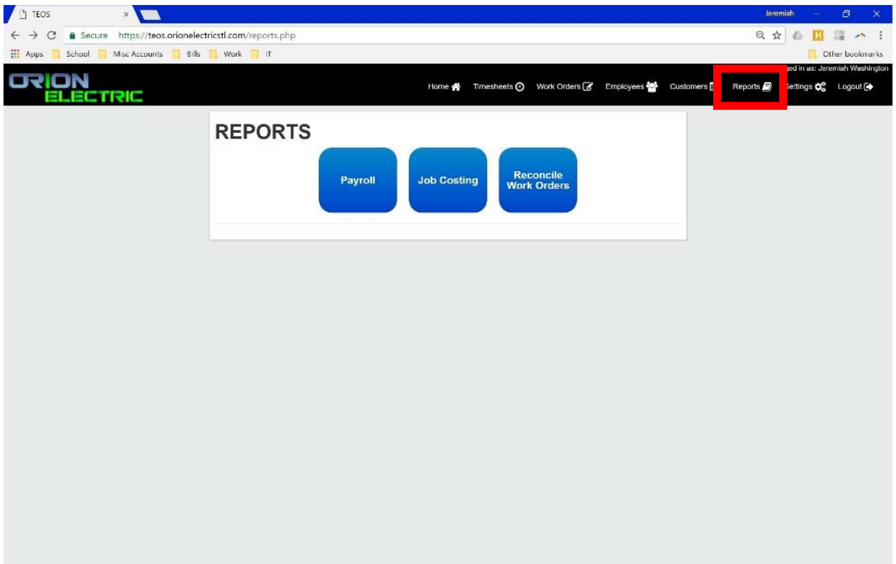
Note: Once you click “Ok” in the confirmation window, you will no longer be able to edit the timesheet.



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.

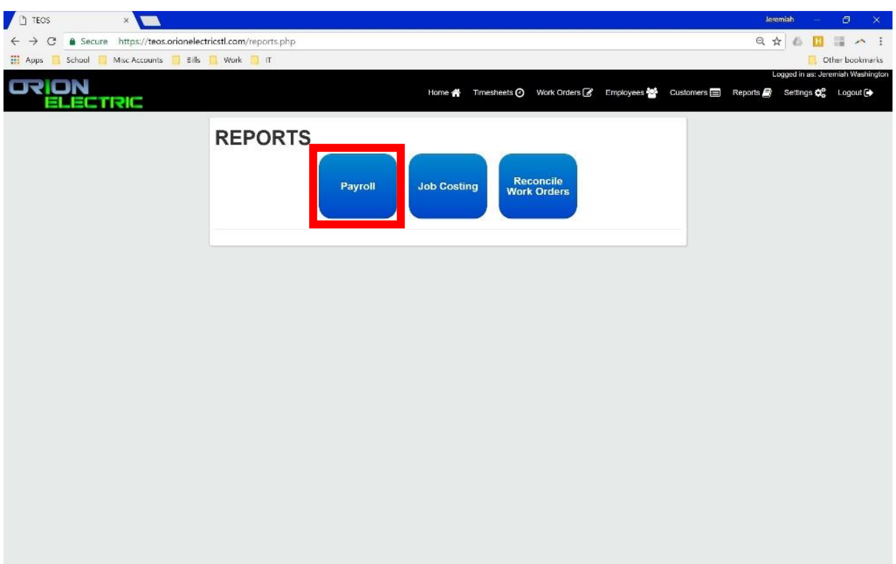
3.6. Reports

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.

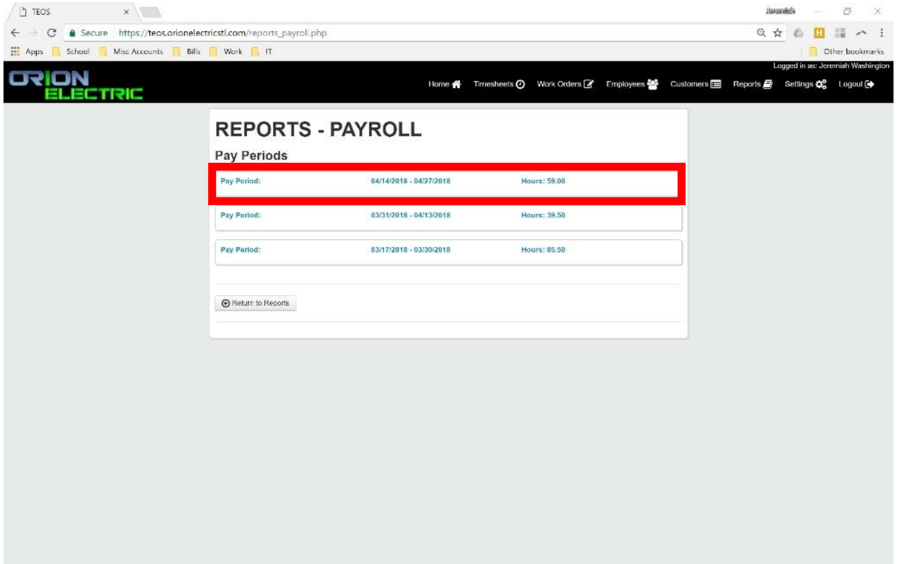


1. To reach the Reports main page, click the link labeled "Reports".

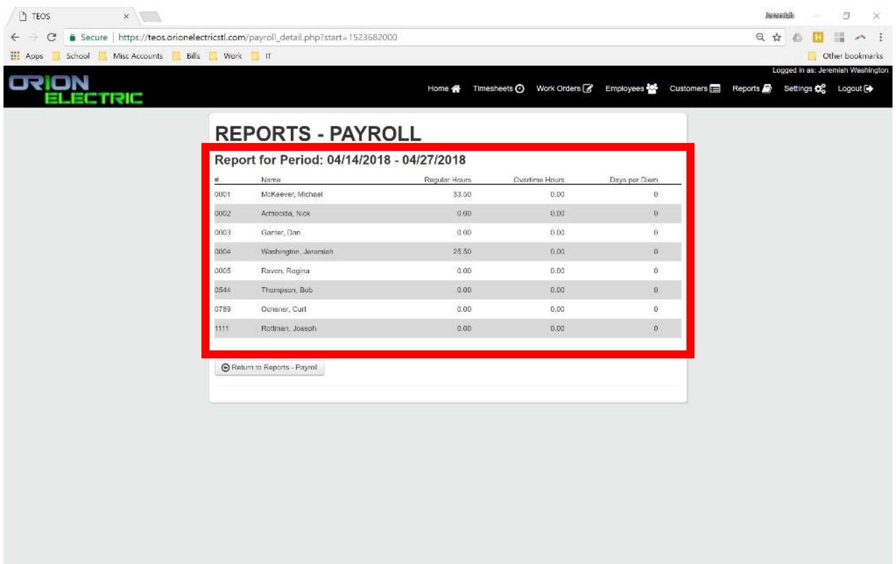
3.6.1. Payroll Reports



1. Navigate to the Reports main page can click the "Payroll" button.

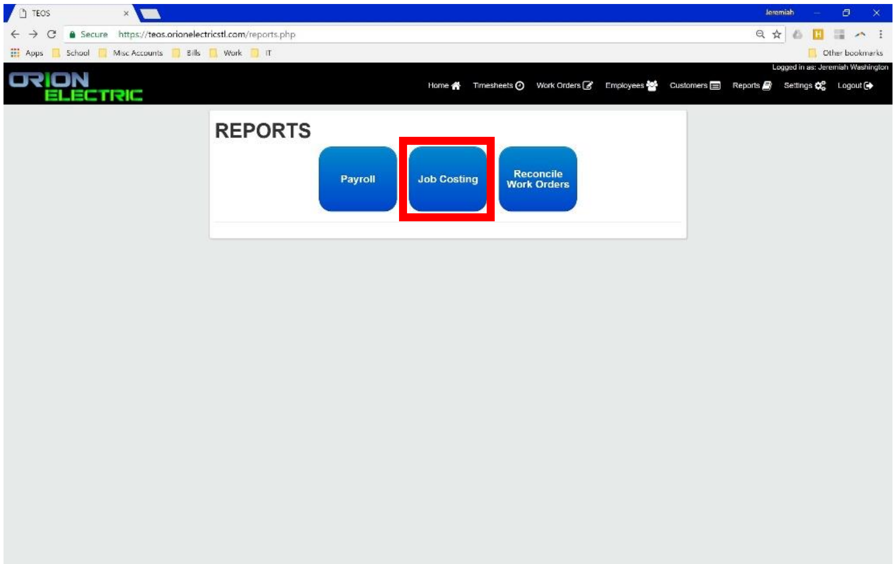


1. Select a Pay Period record that you would like to view.

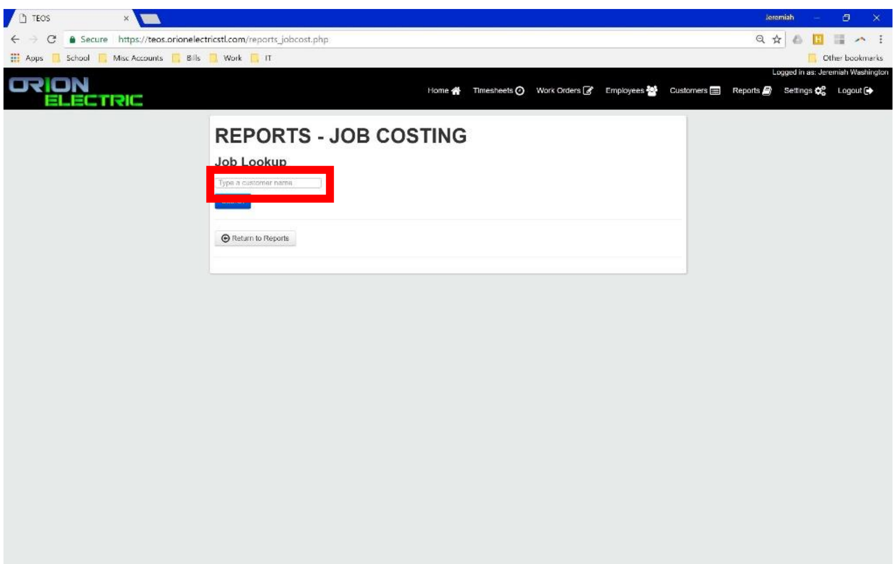


2. The report for the pay period you selected will be display, showing all timesheet records generated during that pay period, regardless of the timesheet' status. The records employees are listed by employee number. The report also displays the regular hours, overtime hours, and per diem days for each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

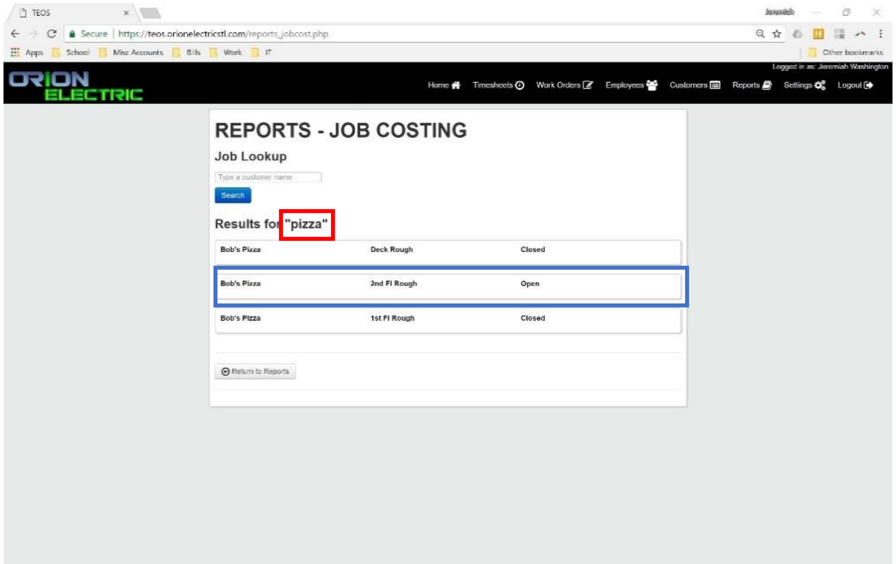
3.6.2. Job Costing Reports



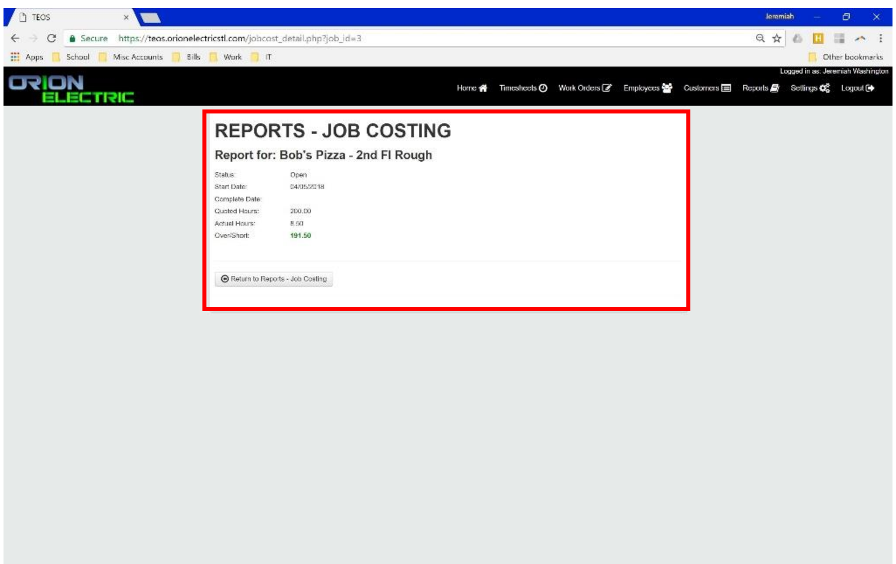
1. On the main reports page, click on the "Job Costing" button.



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.

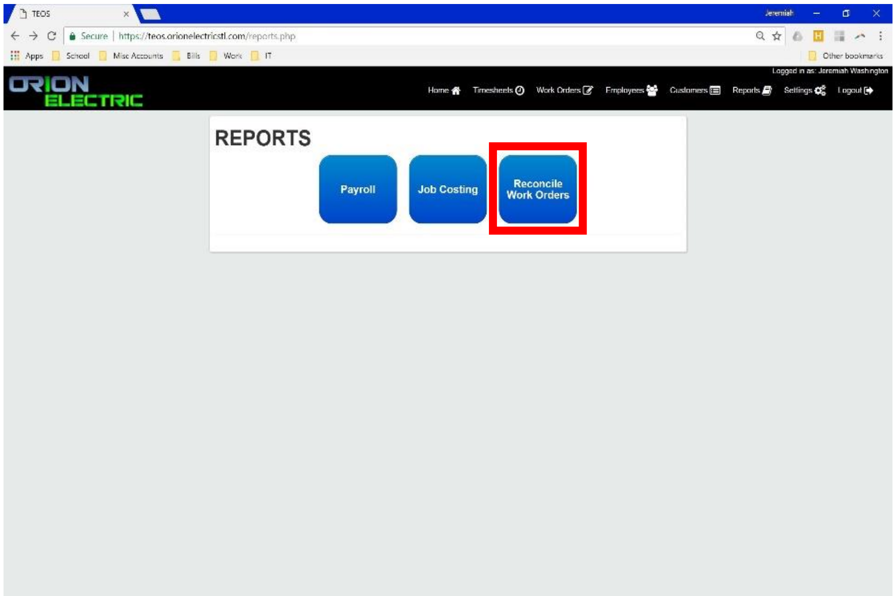


4. In our example, we searched for “Bob’s Pizza”, using the search parameter of “pizza”
5. Select on the record you wish to view.

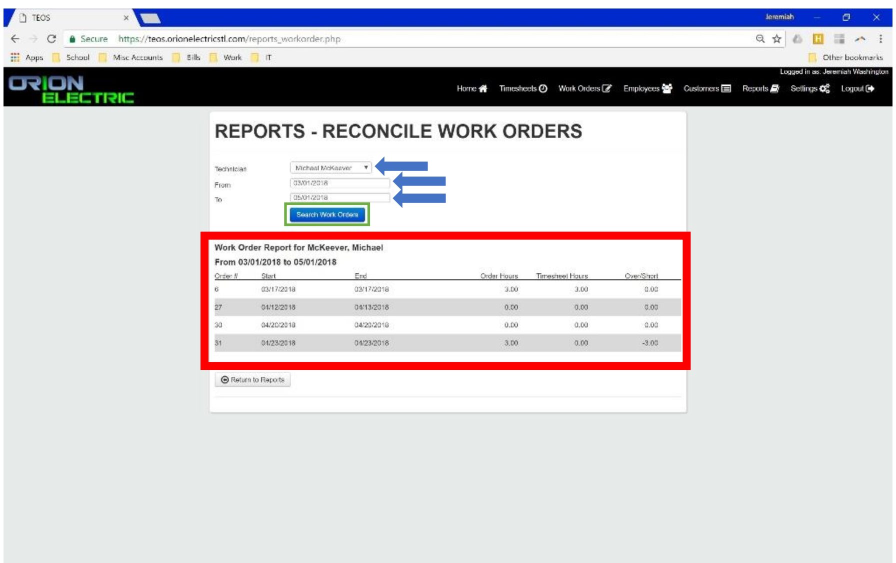


6. Selecting the record will display details about that job such as the start date, end date, quoted hours, actual hours, as well as the amount of under or over quoted hours

3.6.3. Work Order Reports



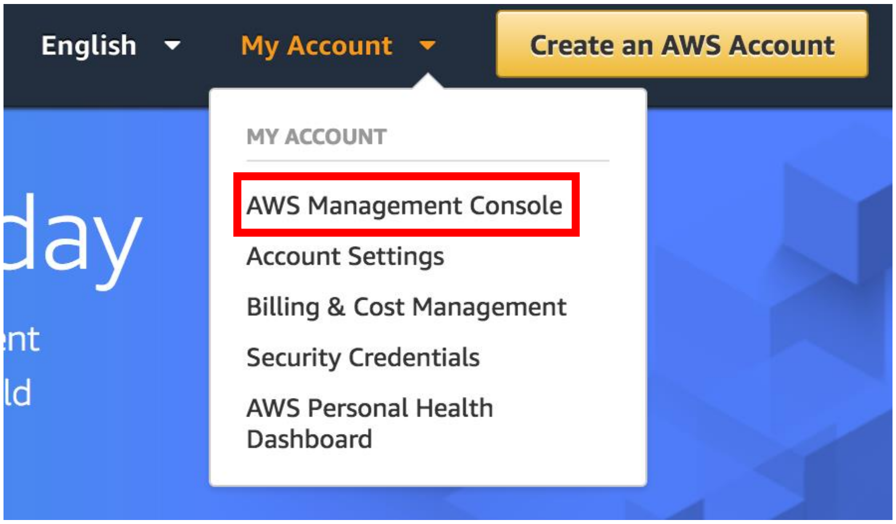
1. Navigate to the Reports main page.
2. Select the "Reconcile Work Orders".



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

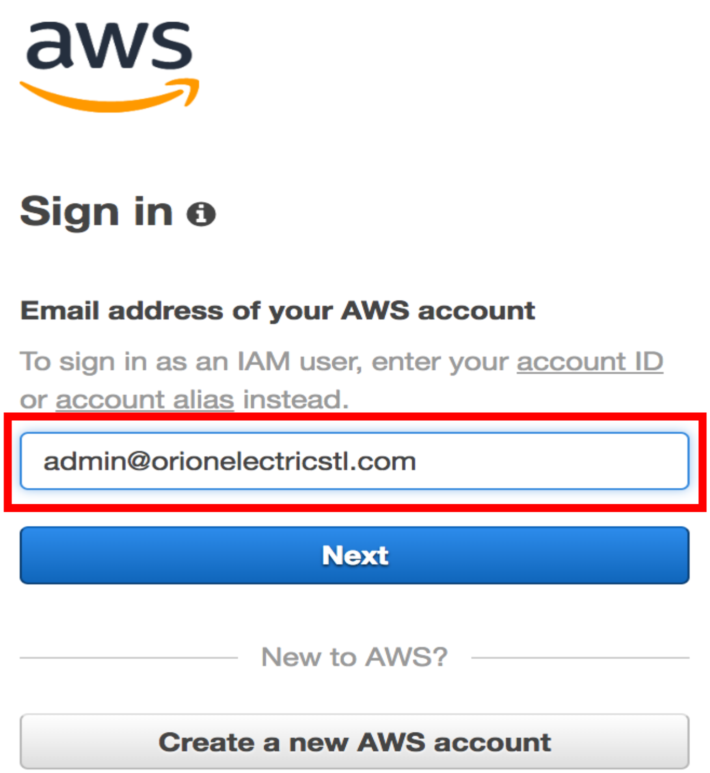
3.7. Amazon Web Service

3.7.1. Accessing Amazon Web Service

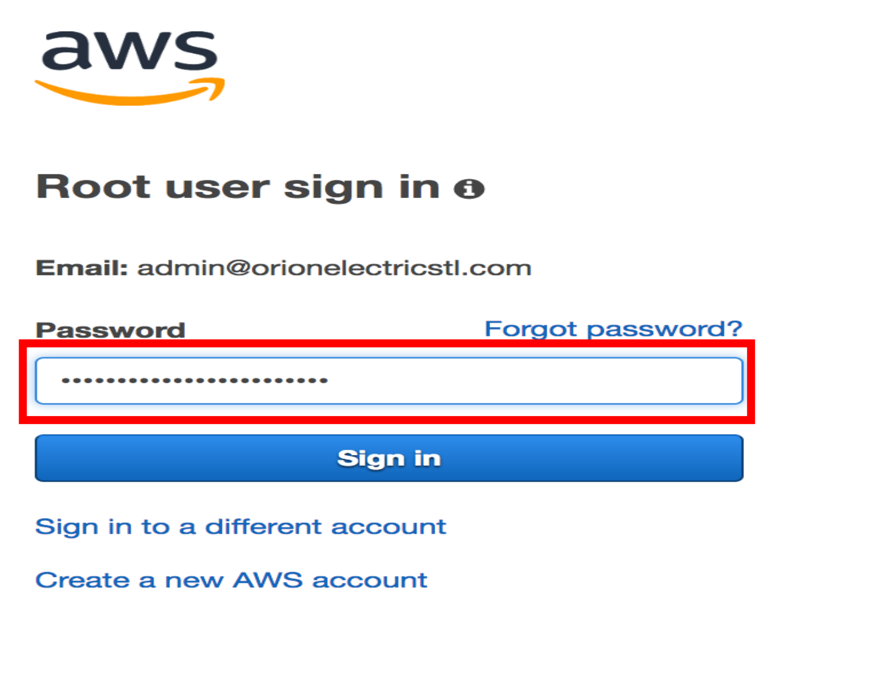


1. Navigate to aws.amazon.com, find 'My Account' and hover over with mouse, select the 'AWS Management Console'.

3.7.2. Logging Into AWS



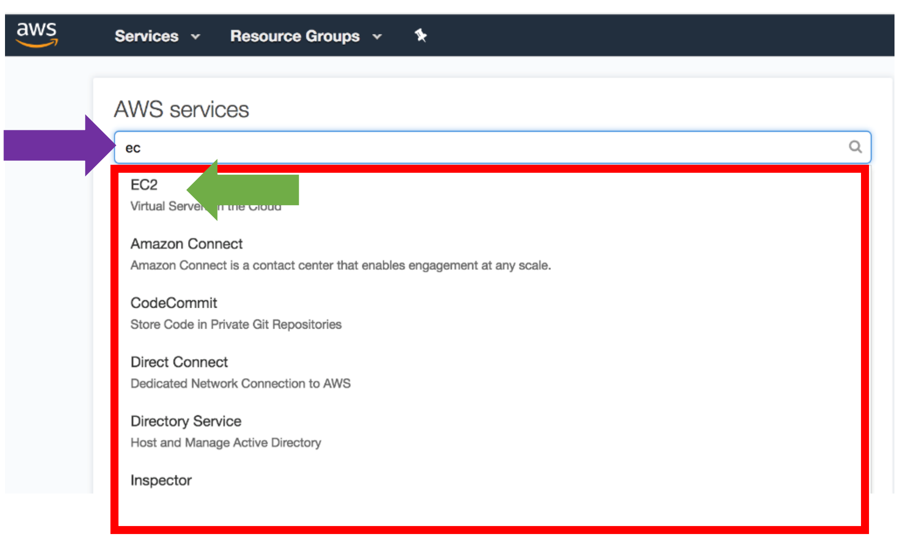
2. Enter admin@orionelectricstl.com as the email of your AWS account



3. Enter Password for you AWS account

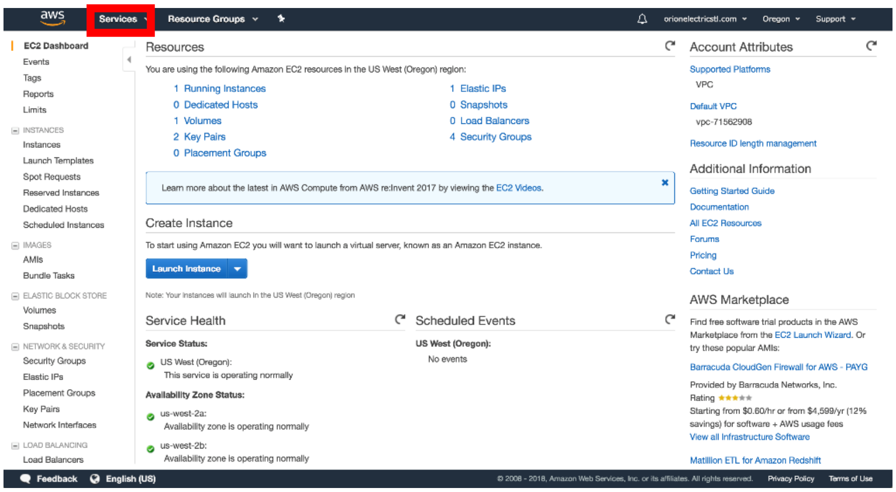
TEOS makes use of the Amazon AWS Services of Amazon EC2 (compute), Amazon S3 (storage), Amazon Elastic Beanstalk (Infrastructure Management), and Amazon SES (email sending).

3.7.3. Navigating AWS

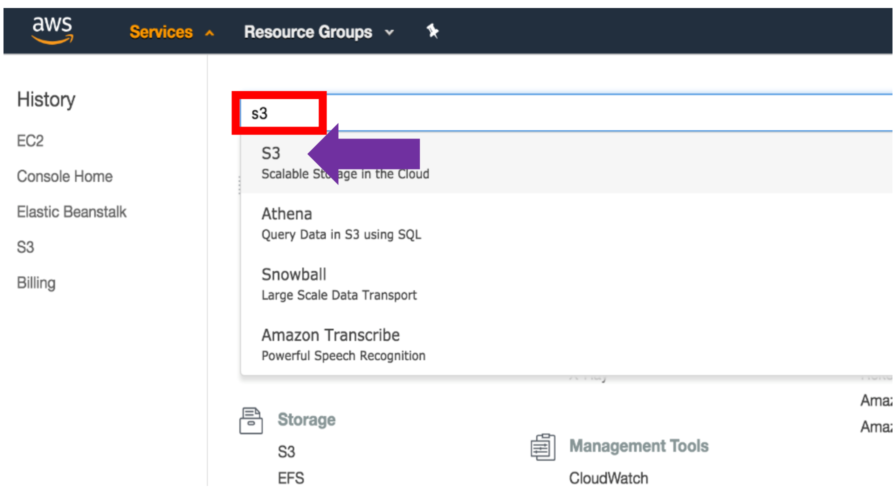


4. After sign-in you will be redirected to this page which shows all of Amazon AWS services which they have available.
5. Notice how 'ec', was typed and a list of services drops down. Select EC2 from the list.

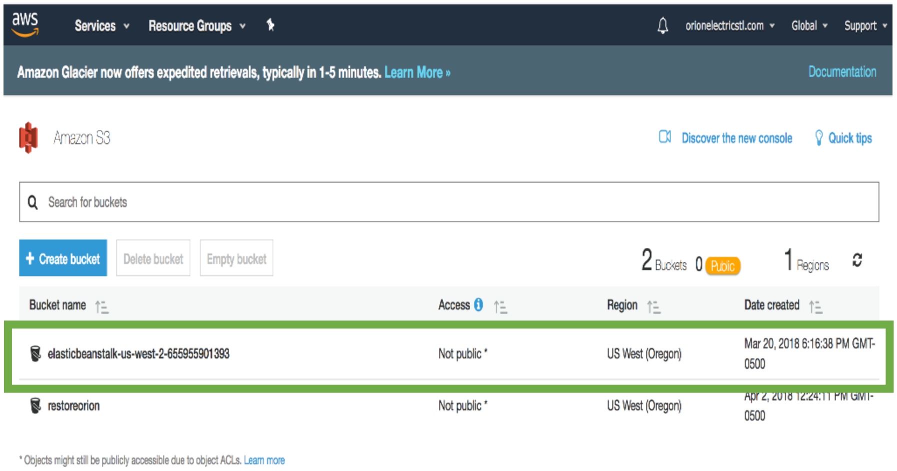
NOTE: The TEOS system makes use of only some of these services. This portion of the user manual will now draw attention to the specific services used by the TEOS system. Due to the vast number of services available it makes most sense to use the search function shown at the top of the screen after log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



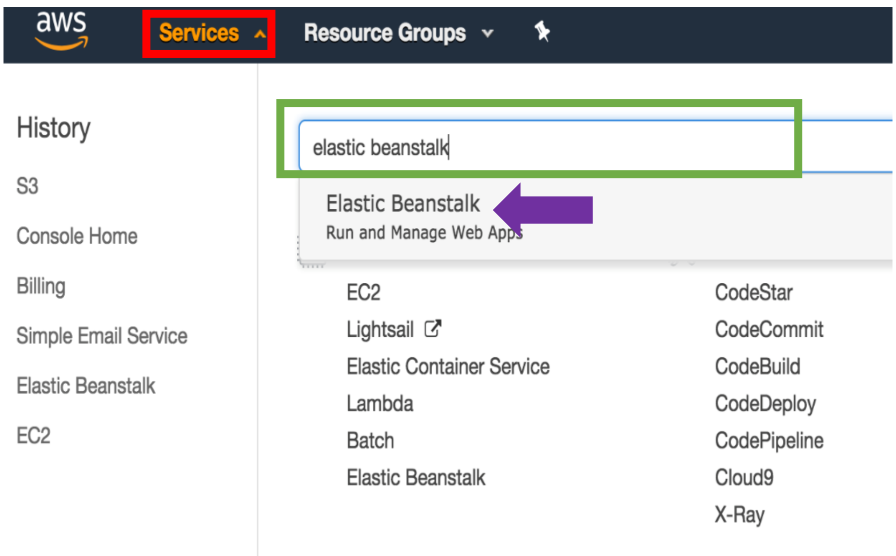
6. You are now shown detailed information about the Amazon EC2 Linux Instance Operating System which is running in the cloud.
7. To access other services, navigate to the top left of the screen, and click 'services'.



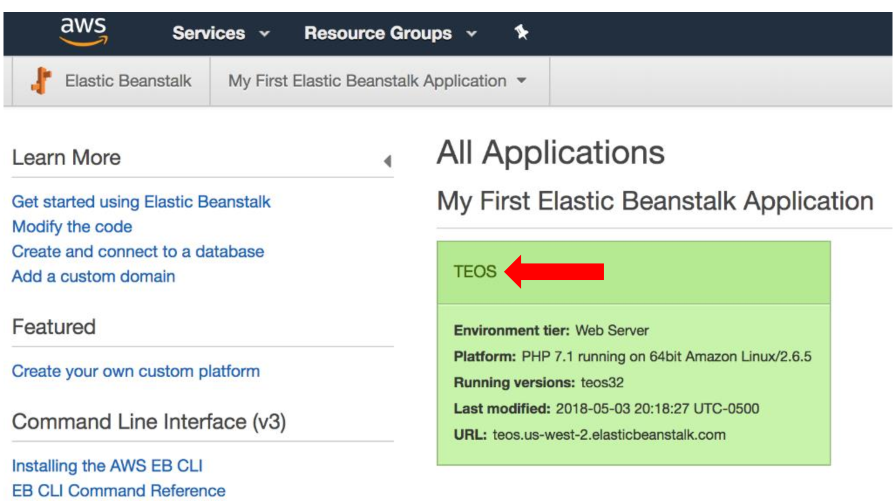
8. We will now type 'S3', selecting the S3 service as it drops down.



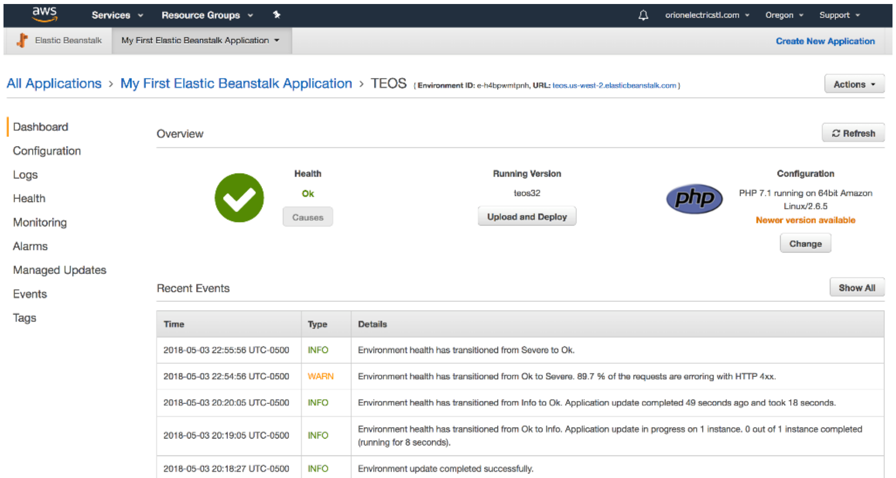
9. We are shown the files which are stored by the operating system.



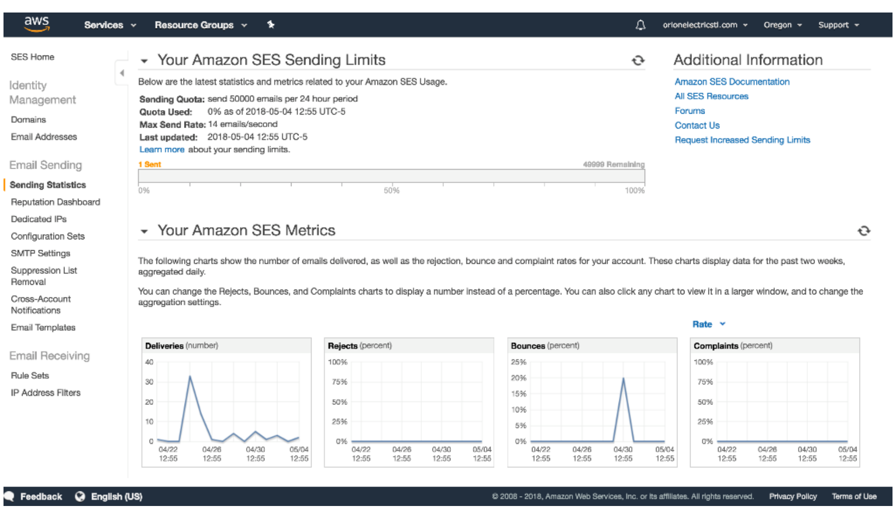
10. Navigating to the top left of the screen, and hovering over services, type elastic beanstalk, in the search bar then click 'Elastic Beanstalk'.



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

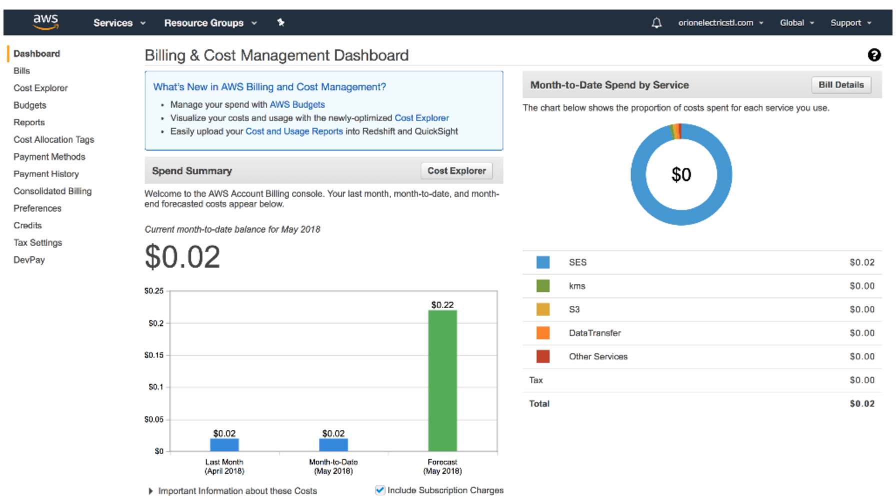


12. We are now shown the Amazon AWS Elastic Beanstalk service. This is where the PHP code is uploaded which then executes on the server. The Amazon AWS Elastic Beanstalk service is a service which takes code, spreads the configuration across the appropriate AWS services. We can think of the Elastic Beanstalk 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 SMPT 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

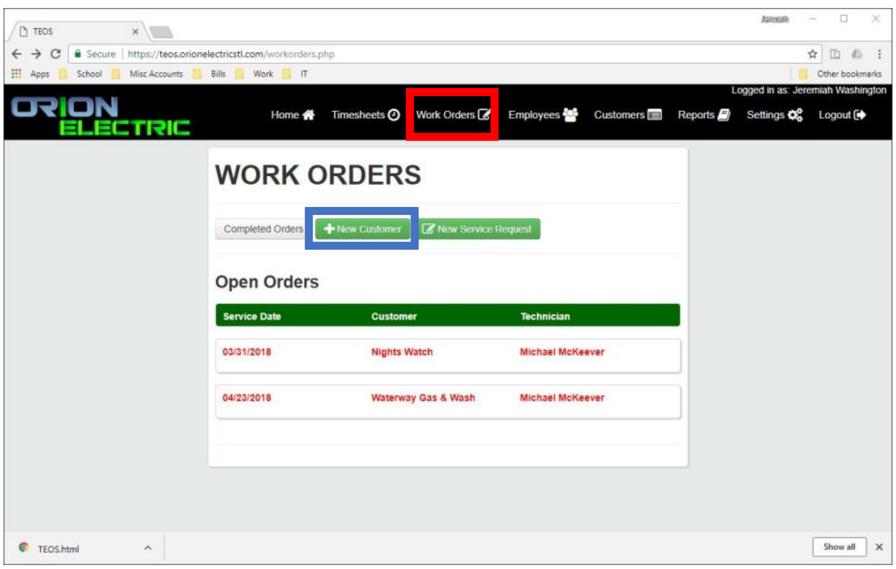
In the event of a system failure. Please navigate to the Backup and Recovery Procedure document.

4. Service Technician Account

4.1. Work Orders

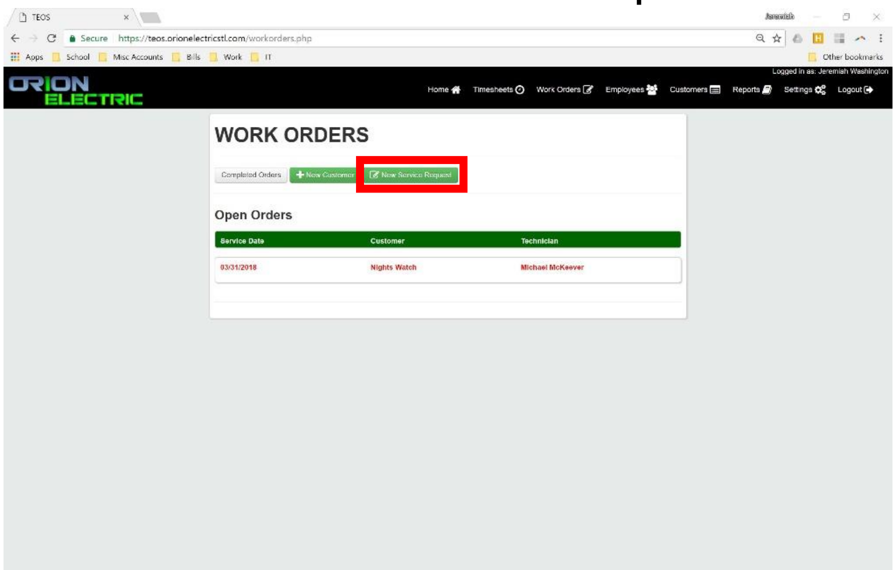
4.1.1. Creating Work Order

4.1.1.1. Create New Customer

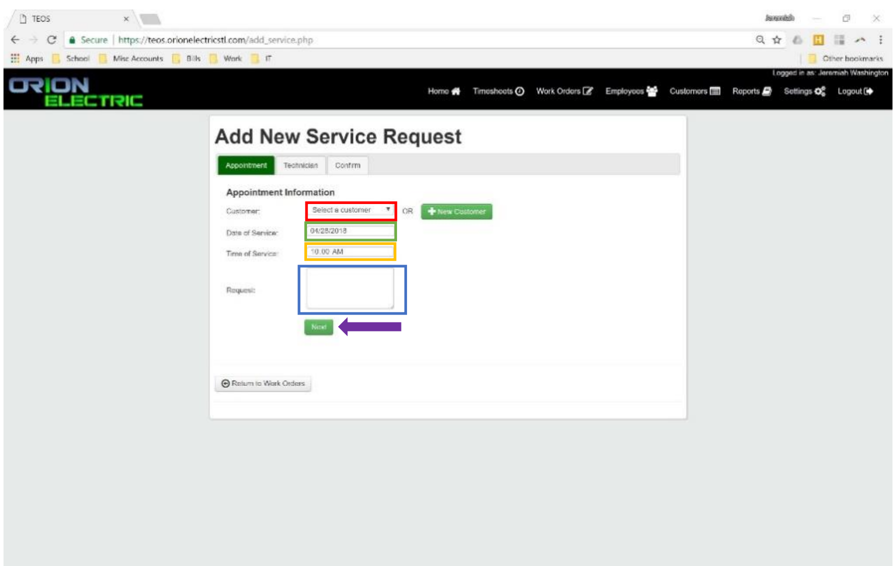


1. To create a new customer, first navigate to the Work Orders main page by click on the link.
2. Click on the "New Customer" button and refer to Section 3.3.2 step 2.

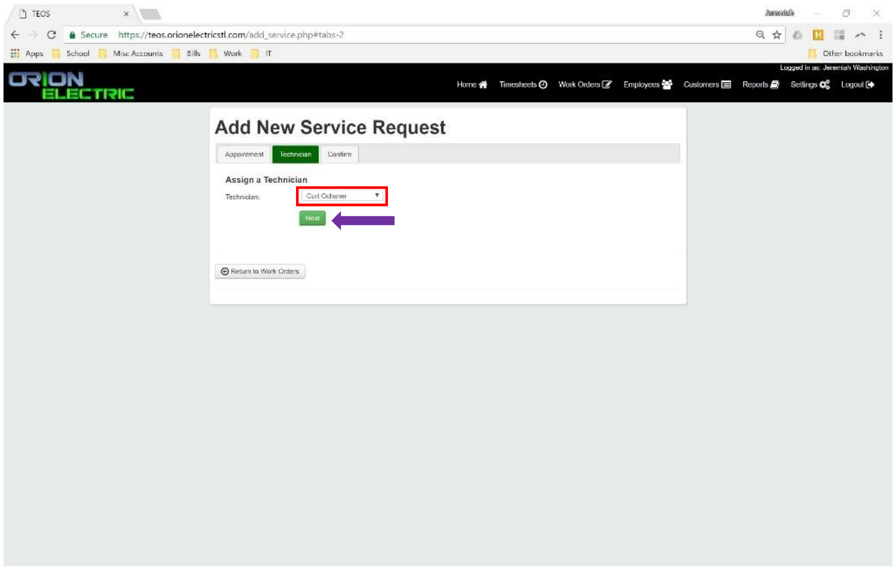
4.1.1.2. Create Service Request



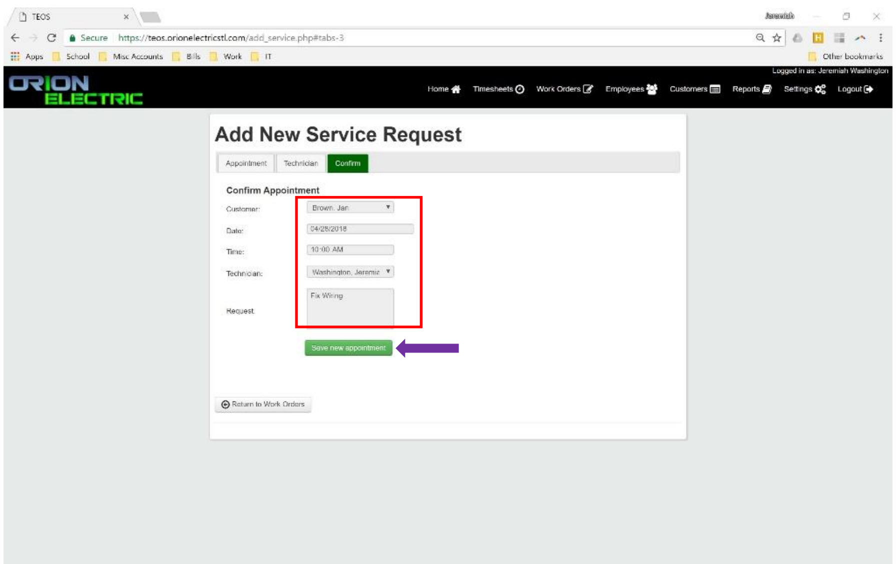
1. Click on "New Service Request"



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.



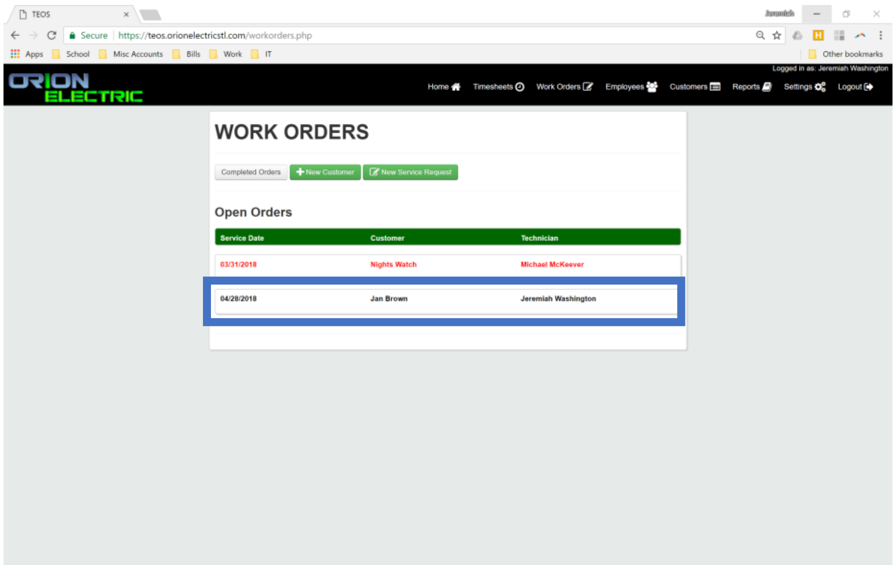
7.
8. Use the dropdown box to select the Technician assigned to the request.
9. Click the "Next" button when finish.



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

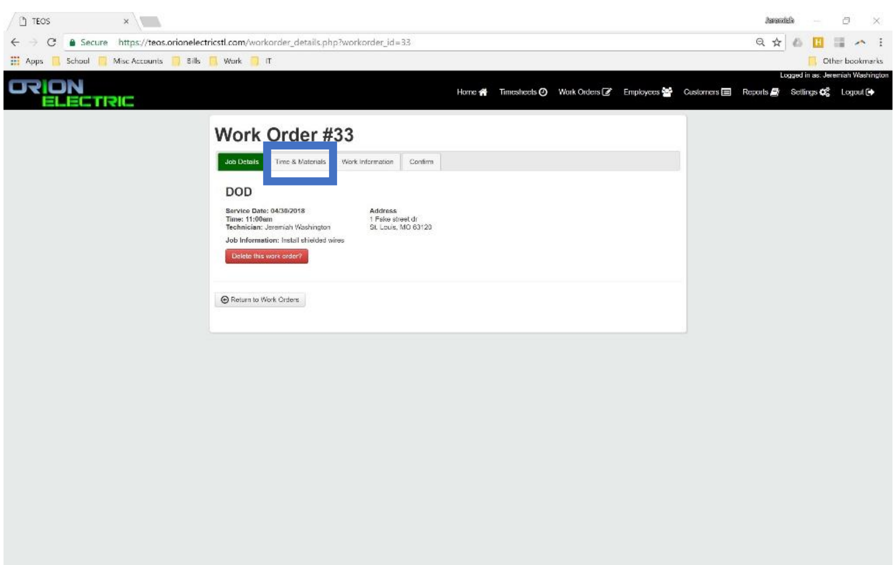
4.1.2.1. Select Open Work Order



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

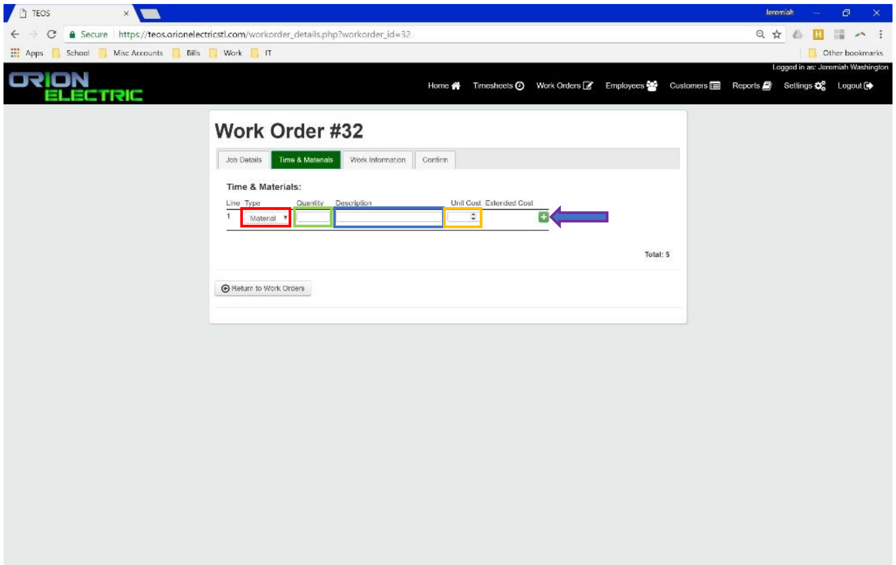
Note: When viewing the Work Orders main page, Open Orders that are still open for more that 48 hours after scheduled service date, turn red.

4.1.2.2. Time and Materials

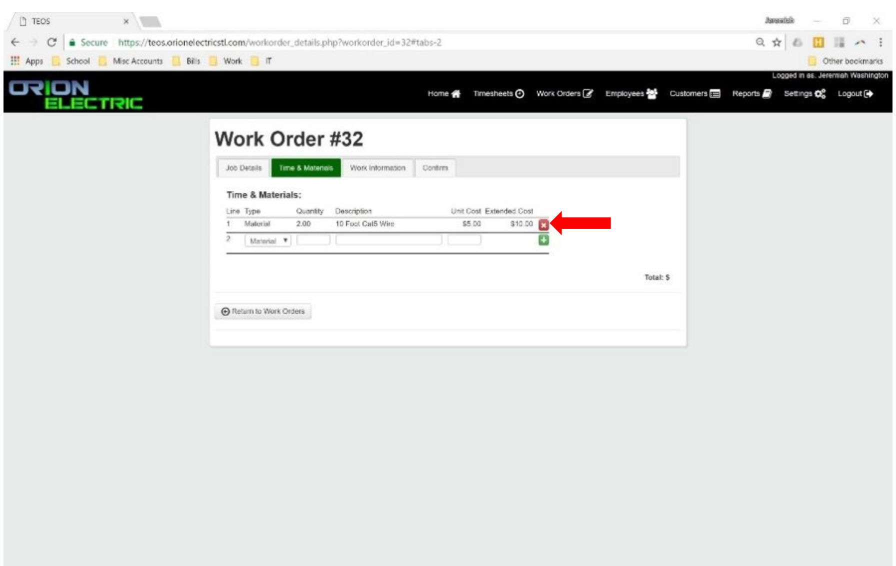


1. when you select the open record, the first tab will display detail about the service requested and customer.

2. Select the "Time & Materials" tab to proceed.

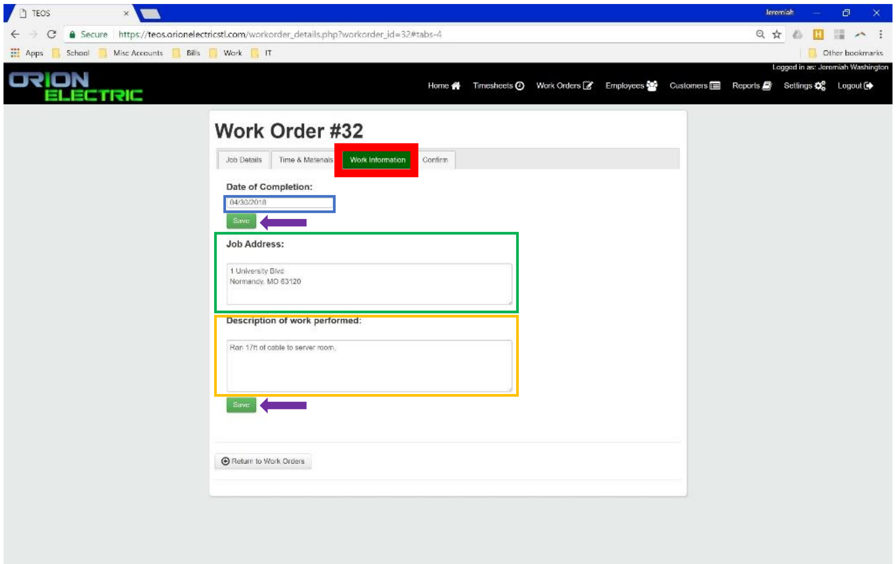


3. Click the dropdown box and select materials or labor for that line type.
4. Enter the quantity of material you used, or labor is selected, enter the how many hours in using .25hr increments.
5. Enter description of item or labor.
6. Enter the cost of labor or the unit cost of the product used.
7.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



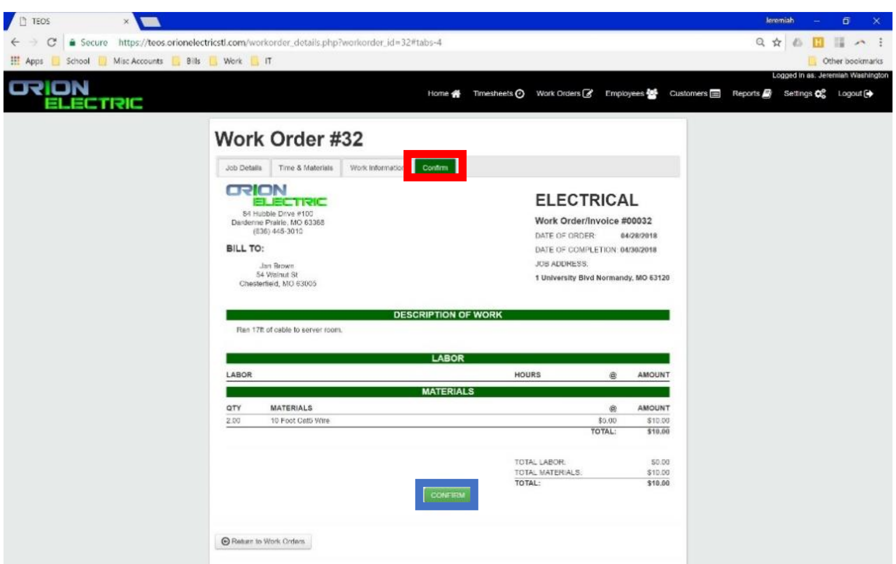
8. Entries can be deleted by click on the "X" that appears after a line has been added.

4.1.2.3. Work Information

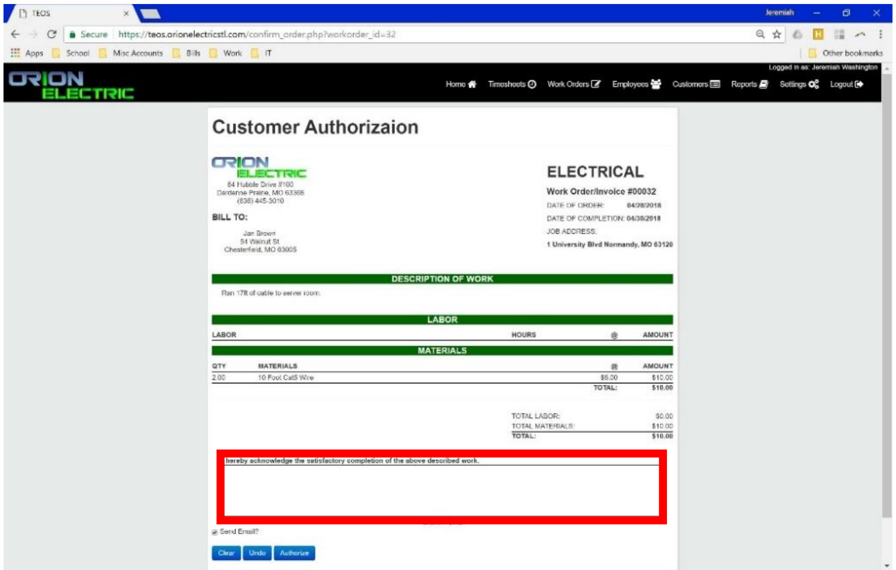


1. Click on the "Work Information" to continue.
2. Click in the "Date of Completion" box to enter an estimated date of completion, then click "Save" to retain this information.
3. Click in the "Job Address" field and enter the address where the work is actually being performed not the billing address.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

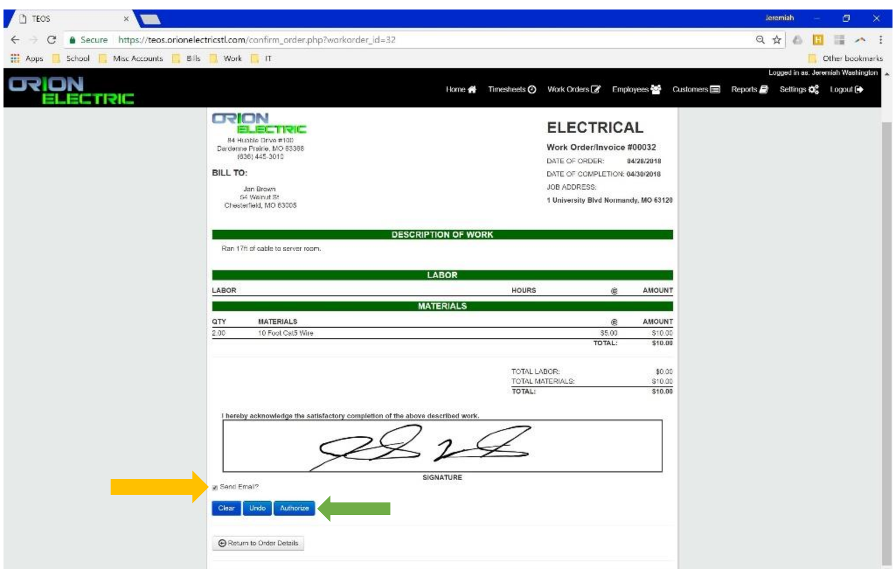
4.1.2.4. Confirm & Complete Work Order



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

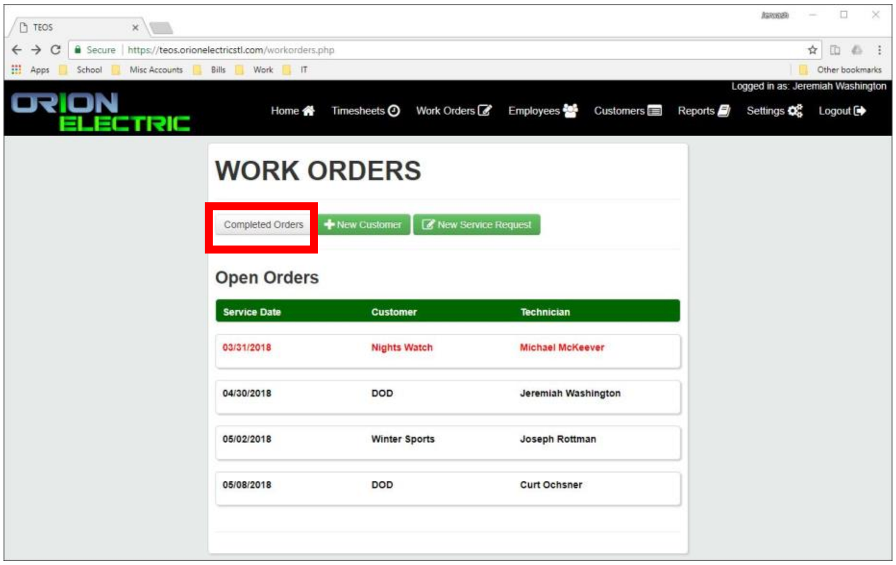


3. Once “Confirmed” is clicked, you will be prompt to enter an electronic signature from the client.

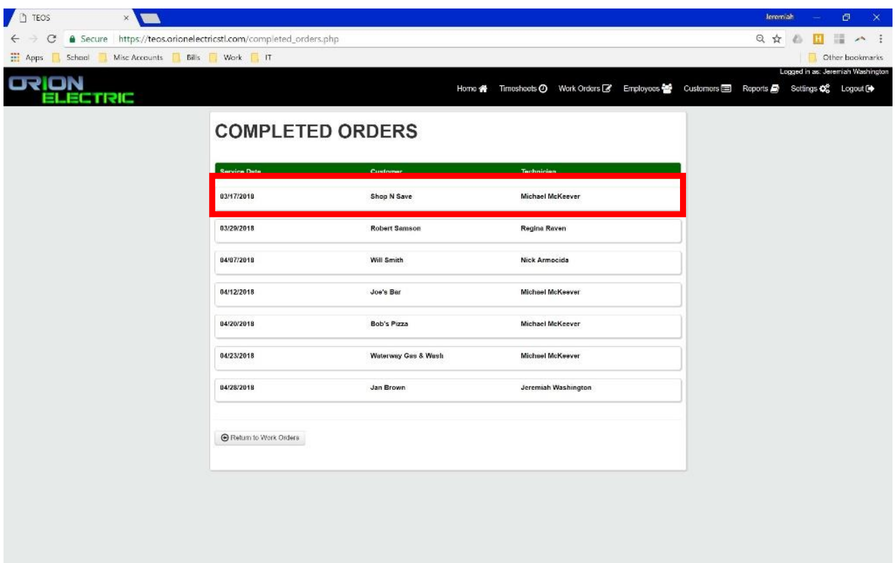


4. If send email is checked, a PDF of this invoice will be sent to the customer’s save email upon completion.
5. Click “Authorized”, to complete this invoice.

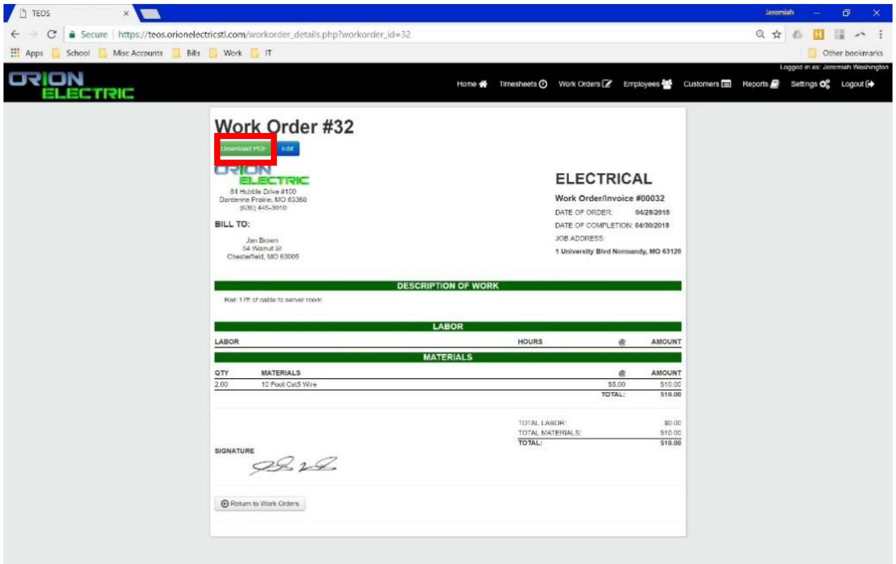
4.1.3. Download Work Order PDF



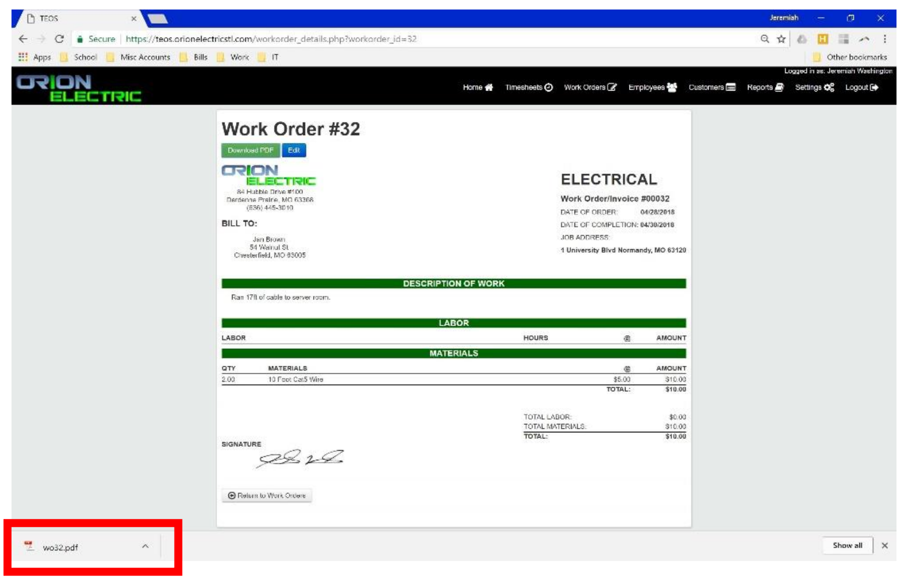
1. To Download a PDF of a Work Order, navigate to the Work Orders, main page
2. Click on the "Completed Order" button.



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



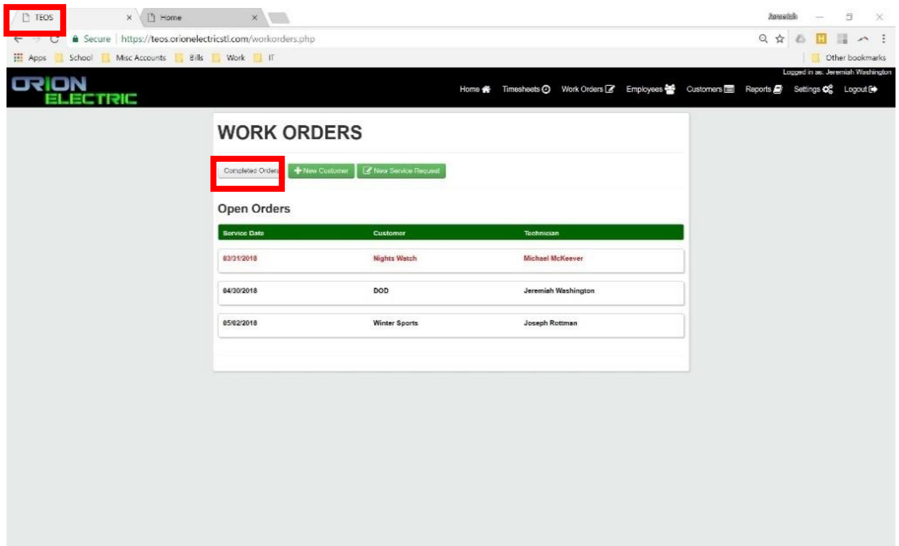
4. Click the "Download" button and the PDF will automatically begin downloading.



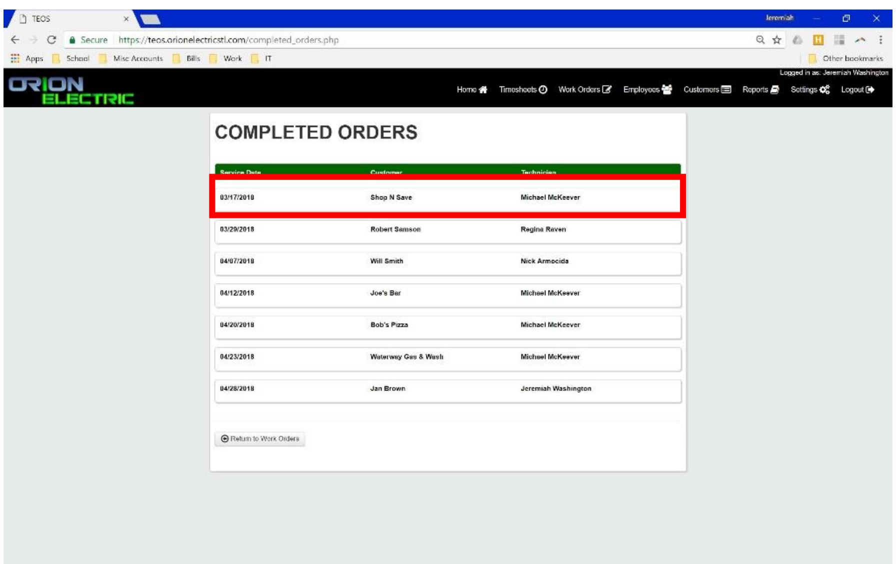
5. The file will download to your default location.

6.

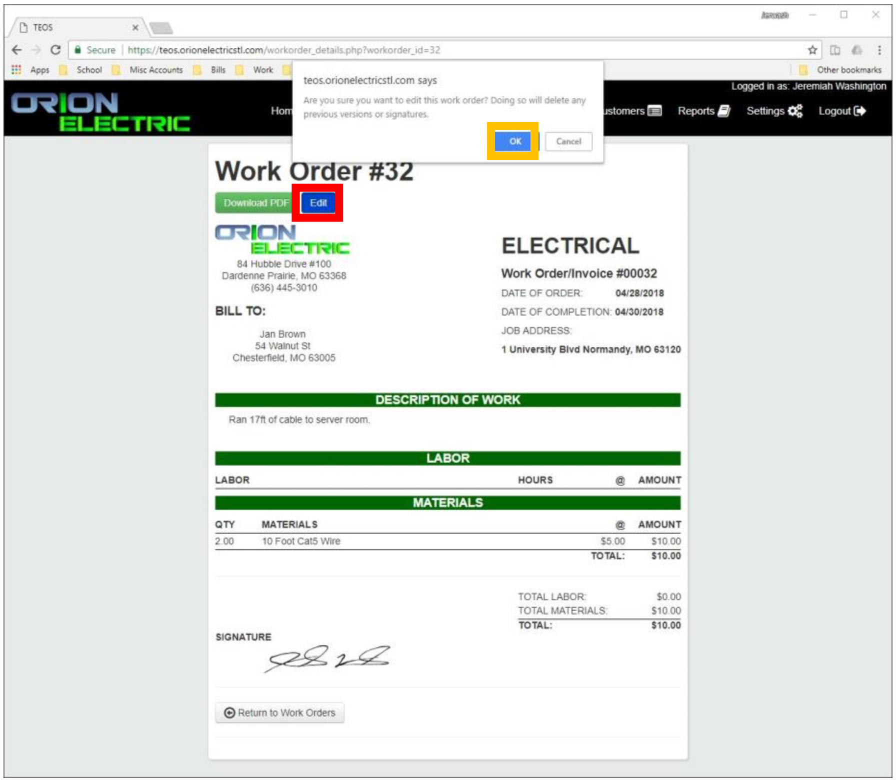
4.1.4. Edit Signed Work Order



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.

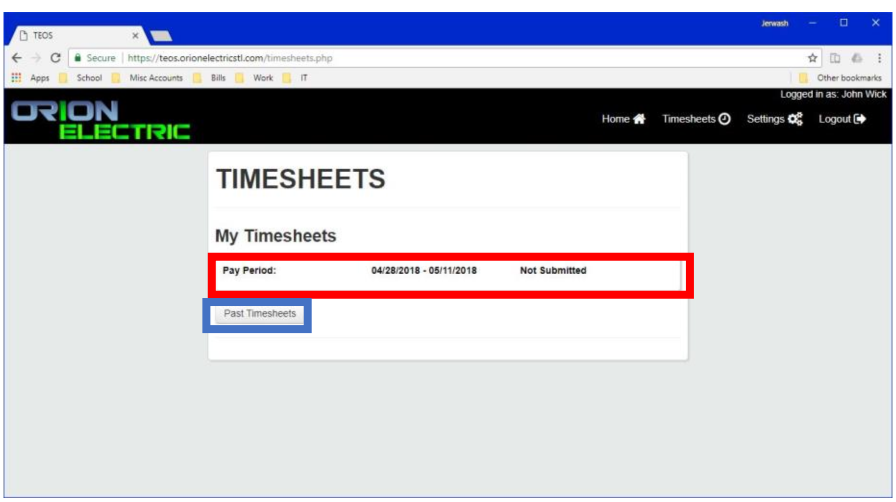
Note: Once you confirm that you wish to edit by clicking "OK", the signature will be removed from the recorded.

5. Basic Account

5.1. Navigating Timesheets

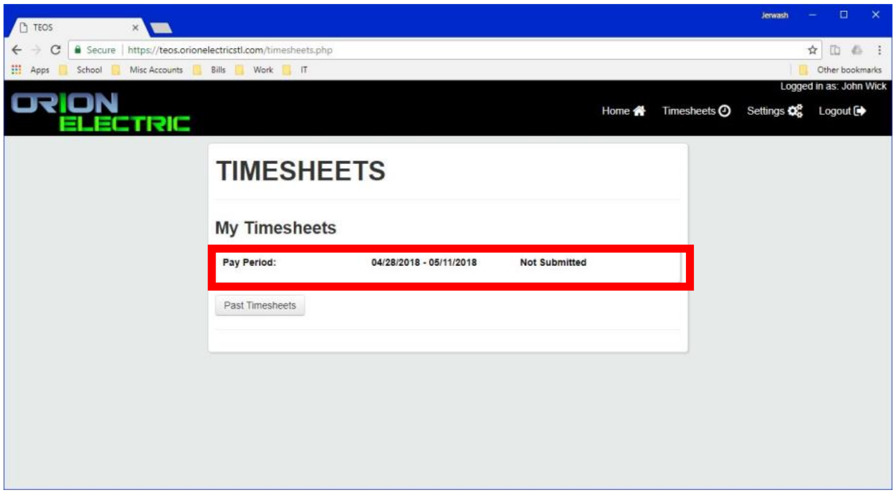
All users will have access to their own Timesheets, located in the timesheets section, on the main page.

5.1.1. Selecting Appropriate Pay Period

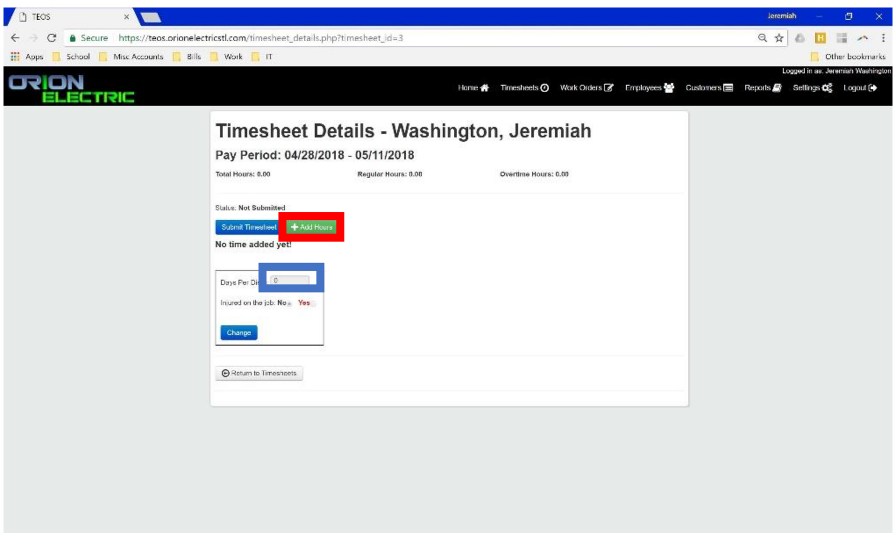


1. By default, users will be able to view the current periods Timesheet.
2. Click on the "Past Timesheets" button to view older timesheets.

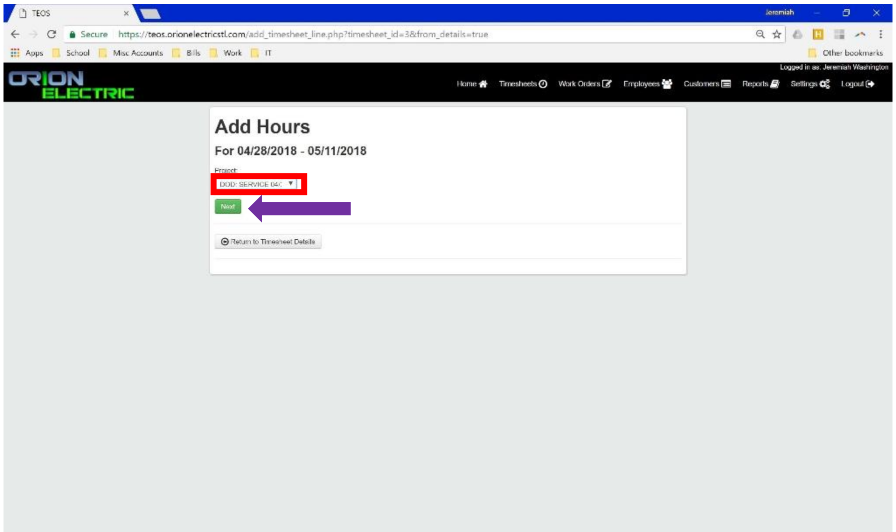
5.1.2. Completing timesheet



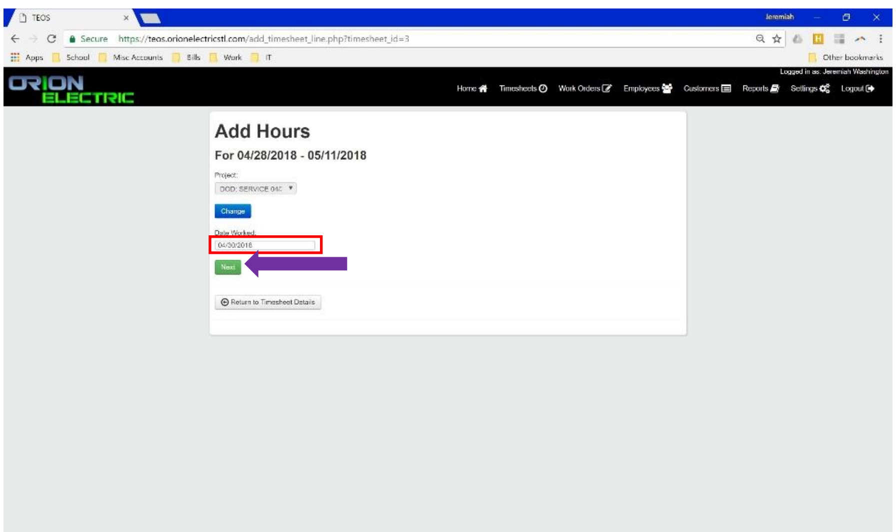
1. To add hours to a timesheet, select the appropriate record.



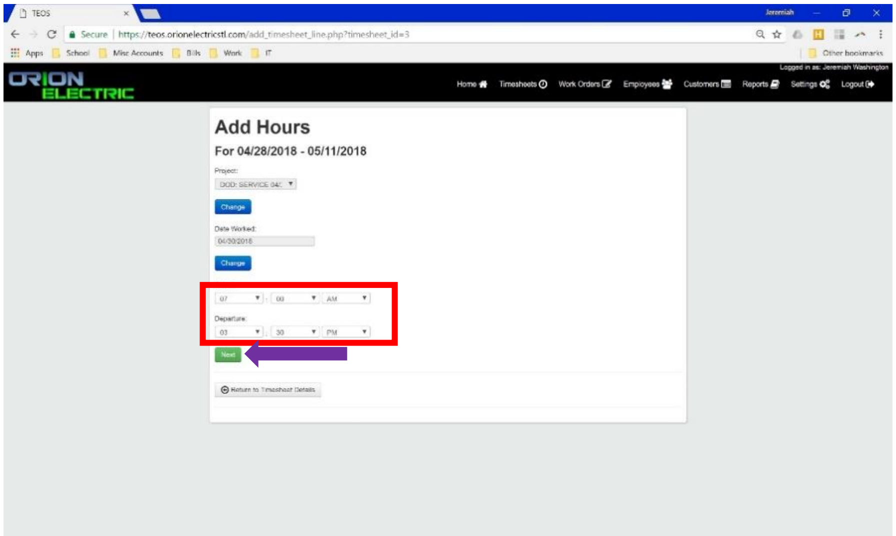
2. Once the record is opened.
3. Enter the total days that you were approved per diem.
4. Click the appropriate radio button asking whether you were injured or not. The button is set to “NO” by default.
5. Click on the “Add Hours” button to add time to timesheet.



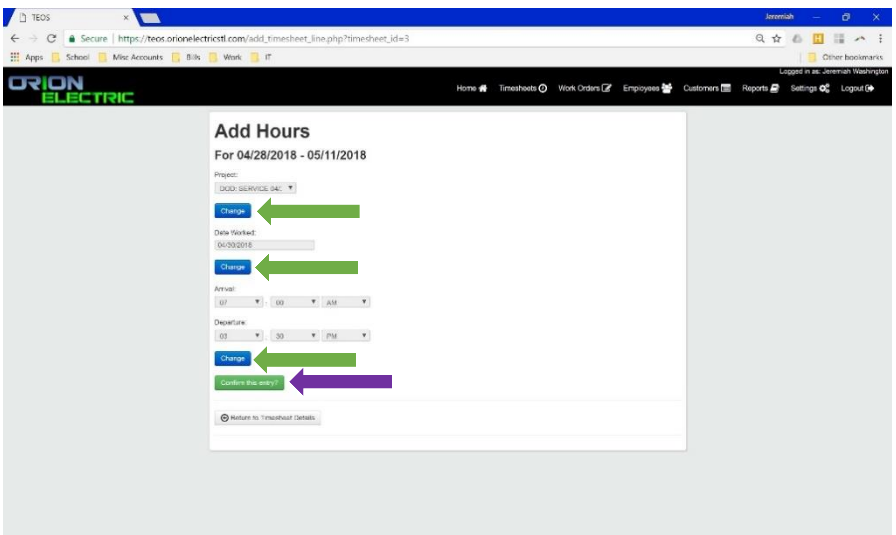
6. Click on the dropdown box to select a project.
7. Click "Next" to continue.



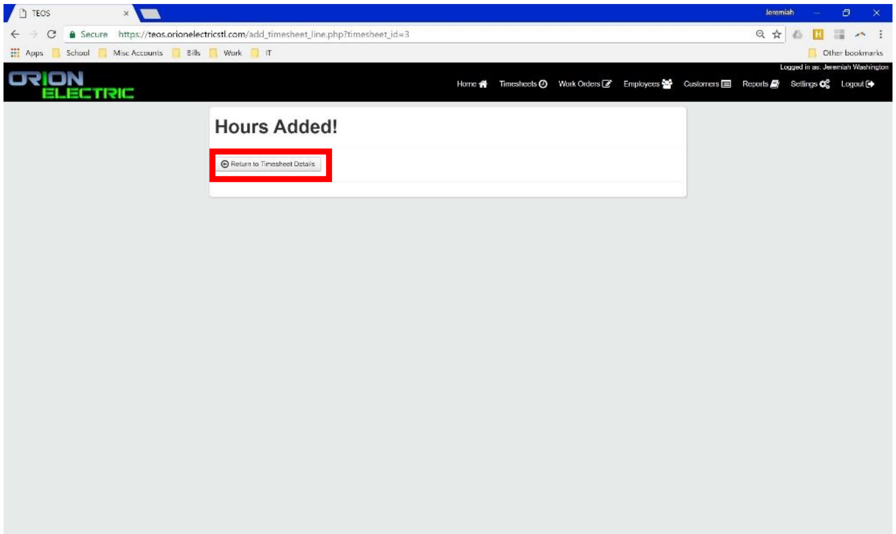
8. Click in the dropdown to select the date you work at this project.



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

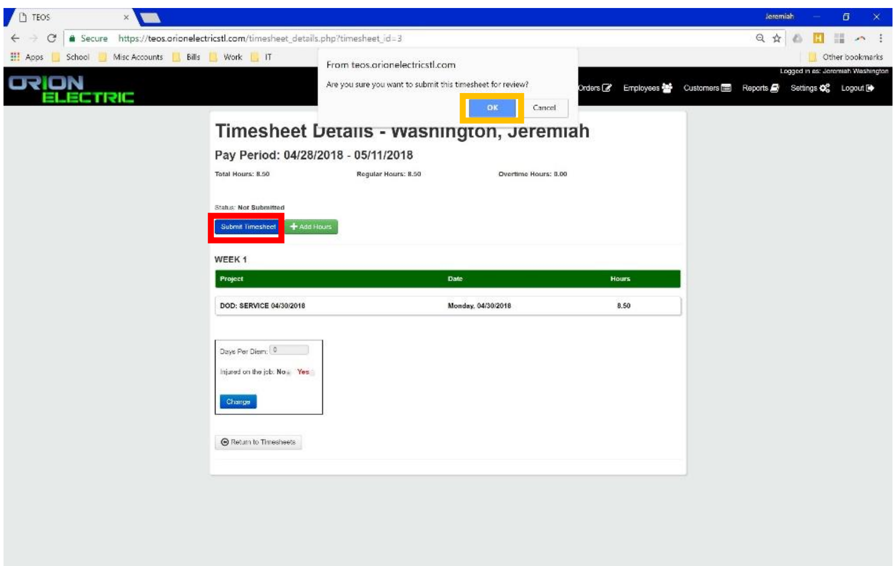


11. You may click on the “Change” buttons to edit the entry or click “Confirm This Entry” to continue.



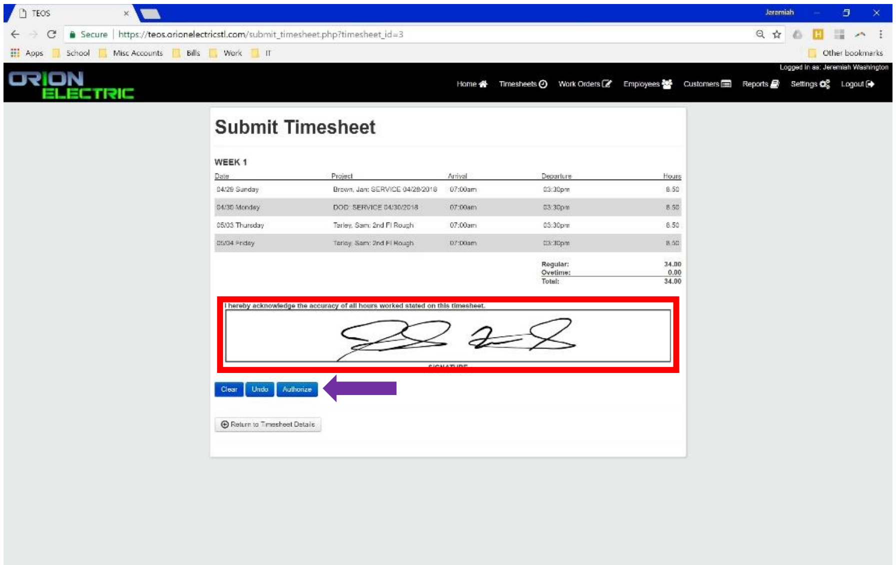
12. After the entry is confirmed, you can click the "Return to the Timesheet" button to add more hours.

5.1.3. Submitting Timesheets

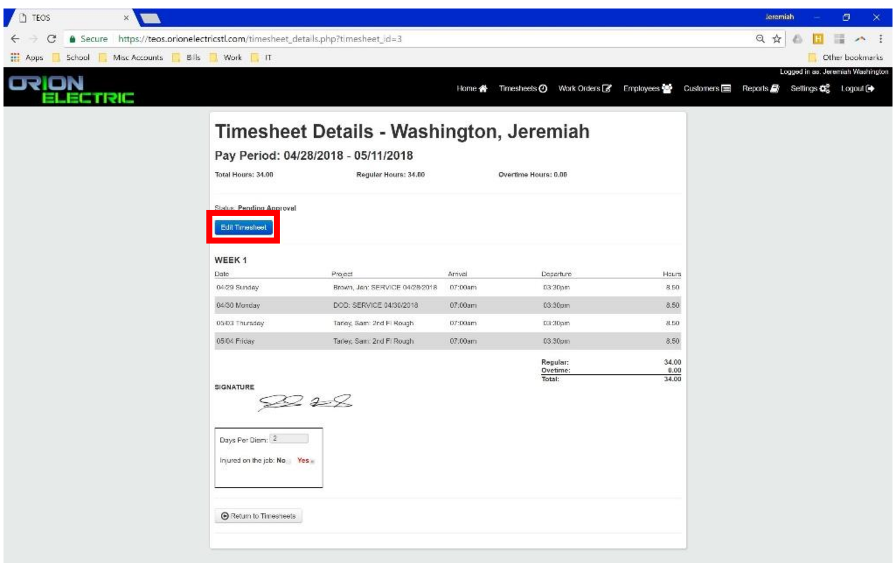


1. To submit a timesheet, open timesheet record.
2. Click the "Submit Timesheets" button.
3. You will be prompted to confirm that you are submitting a timesheet. Click "OK"

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



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



6. A review page will load after you have finalized your timesheet.
7. 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.