

iPJC[©] User Manual

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Introduction

This document is to provide support to the end-users of iPJC. The used examples in this document are based on the Internet browser "Mozilla Firefox" version 3.0. iPJC is initially designed for this browser. Other browsers might have layout and functionality problems (reported in version 1.0 of iPJC)

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1. Requirements

Any windows 2000 or higher system with Mozilla Firefox 3.1 or higher installed.

Local area (or internet from outside) network connection.

iPJC is fully tested and working on the following web browsers:

- Mozilla Firefox 3.1 +
- Apple Safari 3.1.2 +

Client side security certificate (If applicable).

2. Browser Setup (For SSL users only)

Web address: Ask your system administrator

iPJC has 2 levels of security.

- The "Digital Handshake" (client/server side encryption)
- Username/Password protected interface

Installing the client side certificate

In order to access iPJC the provided client certificate has to be installed in the particular browser. Depending on the browsers, this is usually done by going to "Preferences" section under "Privacy and Security", "Certificates", "Manage Certificates". You may be asked to input a Software Security Device Master Password.

* Client certificate: It's a file name which is located on a secret place known by the administrators of UGL.

Username / Password authentication

When the certificate is installed and the digital handshake has been made, the user is able to login with the assigned account.

Users can be created in the management console of iPJC. There are 2 user classes configured: Administrators and Users. Users are not allowed to manage the iPJC interface and cannot delete records from the database. Every login is verified by IP address which is configured when a user is added.

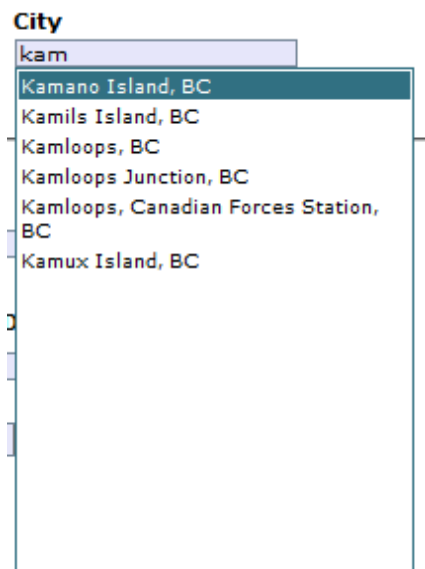
The login information will be stored on the user's local browser as a "cookie". As a result, the user is logged in for a year. This "cookie" is used in the system to identify the user with own private interface settings. Settings can be:

- Plan and Job search result attributes
- Activated archives
- Other user information

3. General information

3.1 Dropdown Menus

Fields in iPJC are designed to type in data and populating a dropdown list of values in the database. For example: cities. When we add a plan, job or contact, and we select a city, we can do that by typing in the city name. After 3 letters a list will show up with matching city names (see image below).



Select one from the list by clicking on the proper city, or use the enter/tab button to select the first one in the list.

If you enter a city without selecting and it doesn't exist in the database, an error message will appear. A new city can be added from the control panel by administrators.

4. Plans

4.1 Searching for a Plan

4.1.1 Regular Search

Use any field in the search window as a search entry for plans. The results will be displayed in "table view". The user is able to disable menu attributes from displaying, which can be done by clicking on "Edit column layout". By checking or un-checking particular plan attributes they will be hidden or shown in the "table view" results.

To view a record the user can click on any value in that table overview. The user is now in "record view" mode. From this point the user can navigate through other records or edit that record.

4.1.2 Date Search

With this function the user is able to do a detailed search based on the plan's "original date" entity. The 3 options are:

- Show all plans after a certain date
- Show all plans before a certain date
- Show all plans between certain dates

This function can be used in combination with global or detailed search to filter records.

4.1.3 Global Search

The Global search field will search in all fields for plans.

4.2 Adding a new Plan

By default a plan will not be linked to a job. This means that all the information the user fills in is related to that plan. When not related to a job there will be plan information + legal information.

If the user chooses to relate the plan to a job (see chapter 5.2.1) then the 'legal information' and the 'location' information will be pulled out from that particular job and filled in to the form fields.

If the plan information appears to be slightly different than the job information, the user is able to change it and will be stored as a new record related to the newly added plan.

4.2.1 Assigning the plan to a Job

The first thing to do when adding a plan is to make sure if the plan belongs to a job. If so, start typing the job number and select the job from the drop down menu. If the job is not entered in the database yet, then add the job first before entering the plan record. If the plan is not related to any job, or the job information is not available then simply leave this field blank.

4.2.2 Assigning other (cross referenced) plans to the plan

In order to assign 1 or more cross referenced plans to that plan, you will have to use the "search" function to select a plan. Based on your search results you can "add" the plan as cross referenced plan.

4.2.3 Adding multiple, survey/plan types and field books

Use the "+" button to add a new field for either survey types or field books. Use the "-" button to remove them.

4.2.4 Adding files to the plan

Once the plan is added you can browse to the plan directory with your regular windows browser. In here you can add/remove or edit files. Everything you do in here will show up in iPJC (plans --> related files tab).

4.3 Edit Plans

To edit a plan you will have to be in "view plan" mode first. Do a search and click on the plan you would like to edit. Click on the edit button in the upper sub-menu to edit the plan.

5. Estimates

5.1 Add an Estimate

This part allows you to setup an estimate and you can later create a job from based on this information. Once an estimate is created you can generate an "estimate letter" from template.

In statistics / Reports you can generate reports based on estimates. It allows you to view what jobs you won, lost or are open.

5.2 Search for Estimates

Use any field in the search window as a search entry for estimates. The results will be displayed in "table view". The user is able to disable menu attributes from displaying, which can be done by clicking on "Edit column layout". By checking or un-checking particular plan attributes they will be hidden or shown in the "table view" results.

To view a record the user can click on any value in that table overview. The user ends up in "record view" mode. From this point the user can navigate through other records or edit that record.



Search

Estimate Number *	Date	Deadline	Type	Status	Estimate by:
					Hit the "+" icon to add

Client

Company:

Person:

Title

Legal Description

The estimate by part are the employees who setup the estimate. An estimate can be setup by multiple employees.

6. Jobs

6.1 Search for Job

6.1.1 Regular Search

Use any field in the search window as a search entry for jobs. The results will be displayed in "table view". The user is able to disable menu attributes from displaying, which can be done by clicking on "Edit column layout". By checking or un-checking particular plan attributes they will be hidden or shown in the "table view" results.

To view a record the user can click on any value in that table overview. The user ends up in "record view" mode. From this point the user can navigate through other records or edit that record.

6.1.2 Date Filter

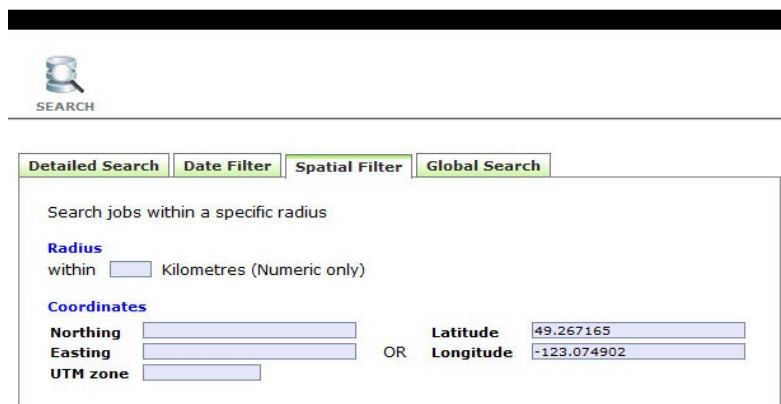
With this function the user is able to do a detailed search based on the date taken entity. The 3 options are:

- Show all jobs after a certain date
- Show all jobs before a certain date
- Show all jobs between certain dates

This function can be used in combination with global or detailed search to filter records.

6.1.3 Spatial Filter

This filter allows you to search jobs within a certain radius based on UTM coordinates or latitudes and longitudes. Fill in either of these coordinates and enter the radius. The system will show results sorted by distance.



The screenshot shows a web application interface for searching jobs. At the top, there is a black header bar. Below it, a search icon and the word "SEARCH" are visible. A horizontal line separates the header from the search area. The search area contains four tabs: "Detailed Search", "Date Filter", "Spatial Filter", and "Global Search". The "Spatial Filter" tab is currently selected. Below the tabs, the text "Search jobs within a specific radius" is displayed. Under the "Radius" section, there is a label "Radius" and a text input field followed by "Kilometres (Numeric only)". Under the "Coordinates" section, there are two groups of input fields. The first group includes "Northing", "Easting", and "UTM zone". The second group includes "Latitude" and "Longitude". The "Latitude" field contains the value "49.267165" and the "Longitude" field contains the value "-123.074902". An "OR" label is positioned between the two groups of coordinates.

6.1.3 Global Search

The Global search field will search in all entities for plans. It is also possible to search plans related to contacts entered in that field.

6.2 Adding a new Job

In "add jobs" we see 3 tabs.

- Main (info + contacts)
- Details
- Completion

6.2.1 Main Information and contacts

In this tab we enter the job's main information including the clients. Initially when adding a job we can add a client and 1 consultant. After a job is inserted we can add more consultants to that job. There are 3 different ways to attach a client or consultant to a job:

- Search for companies/persons
- Automated lookup when typing a contact name in either box.
- Adding a new contact using the "add new contact" button.

For each contact we can have a company, person or a combination of both.

To add a client or consultant we can either type the company name and make a selection or, click the "search" button and search for the client.

After a company is selected then we add a person. If we actually entered a company the lookup list will be based on the company entered earlier. Otherwise it shows all persons.

6.2.2 Details

In this tab we enter the job's details, which are basically subdivided into two portions. The location and the legal description.

Use the "Geocode" button to convert the typed in address into lats and longs. This is useful to do spatial searches in the database.

6.2.3 Completion

In this tab we can add optional completion information. It is most likely used when a job is completed.

6.3 Edit Jobs

When viewing job information the user can click on "Edit Job". To add or remove job contacts click on "Edit related contacts". To edit the "completion" information, hit the "edit completion" button.

6.4 Assigning a plan to a job

To create a new plan and link it directly to a specific job number, simply browse to the specific job and click on "Make Plan" button in the upper menu.

You will be redirected to the "Add Plan" menu and the default values from that particular job are filled in automatically.

6. Contacts

6.1 Search for a Contact

When a user enters the search menu for contacts, he is able to choose between a person and a company or both. Make a selection and the proper search forms show up. Use any field as a search entry for a contact.

The results will show up in the right screen. Detailed contact information can be found by clicking on the name of that contact.

6.1.1 View relationships between companies and person's

In detailed contact information, you will find contacts listed which are related. For example if we are looking at the detailed information for the company "Underhill Geomatics" then we'll find a list of employees for that company. If we click on one of the listed employees, we end up in detailed information for that employee. It also lists the companies that employee is working for. You will find "Underhill Geomatcs" listed.

6.1.2 Contact a company or person through e-mail or "Skype".

Some users use Skype to make phone calls. Skype is a desktop application which can be used to call to other Skype users or to land lines and mobile phones. For more information about Skype visit www.skype.com.

When Skype is installed then the user is able to click on the phone numbers listed in the search results. Skype will automatically start making a phone call to that number. If there is no icon in front of the phone nuber then contact an iPJC administrator to install the proper plugin.

For sending out e-mails through iPJC the user need to have set up his e-mail client such as Microsoft Outlook, Mozilla Thunderbird or Netscape etc. Please contact a iPJC administrator to setup the e-mail client. A user can click on the e-mail address in the search results window. The e-mail client will automatically generate a send mail screen.

6.3 Adding a new Contact

There are 2 different types of contacts you can add to the system, simply a person or a company.

When adding a contact a type selection has to be made first. A company has different entities as a person. If the user is adding a person then it is possible to relate this contact to up to 4* companies (employers). To do this is by clicking the '+' icon on the right side of the screen. The user can select a company either from a dropdown menu or using the search function. In the search results it is possible to view company information and "Add" the company to the person as an employer.

For each company being added to the person, it is optional to fill in specific business related contact information (such as business phone number, business fax etc.) And to add more companies simply click on the + sign next to the dropdown selection box.

To remove a company click on the '-' icon next to the '+' icon.

To add a company as a contact is basically the same routine. But a company can store up to 25* different employees.

Each contact either a company or person can have up to 4 role- and industry types. Adding or removing those can be done using the same + and - icon.

* = the numbers represented are default and variable. These can be configured by the administrator.

6.4 Edit Contacts

A contact can be edited when viewing its details. Click on the "Edit" button in the upper menu. A different screen will pop up. It is also possible to add or remove companies or persons to that contact.

To save the modifications click on the Green "V" button.

7. Reports

iPJC has 3 standard reports built in.

7.1 Work order report

The work order report is a summarize of the job entered as a record. These are commonly used for correspondence on the job site and are kept with the job file.

This report is HTML based.

To print work order sheet you have to be in the "job view" mode. In the upper menu bar simply click "work order sheet". Then use the print button to print. Do not use the browser's print functionality, since it will print the whole website.

7.2 Job Labels

Job labels are used to print on stickers. These stickers are commonly used to put on job folders. The label template is HTML based and is designed to print 2 labels on **avery 5168** standard.

The label contains short summarized information about the job site and contacts (client or consultants). If the billing address from the contact is different than the mail address, it will be printed on the second label.

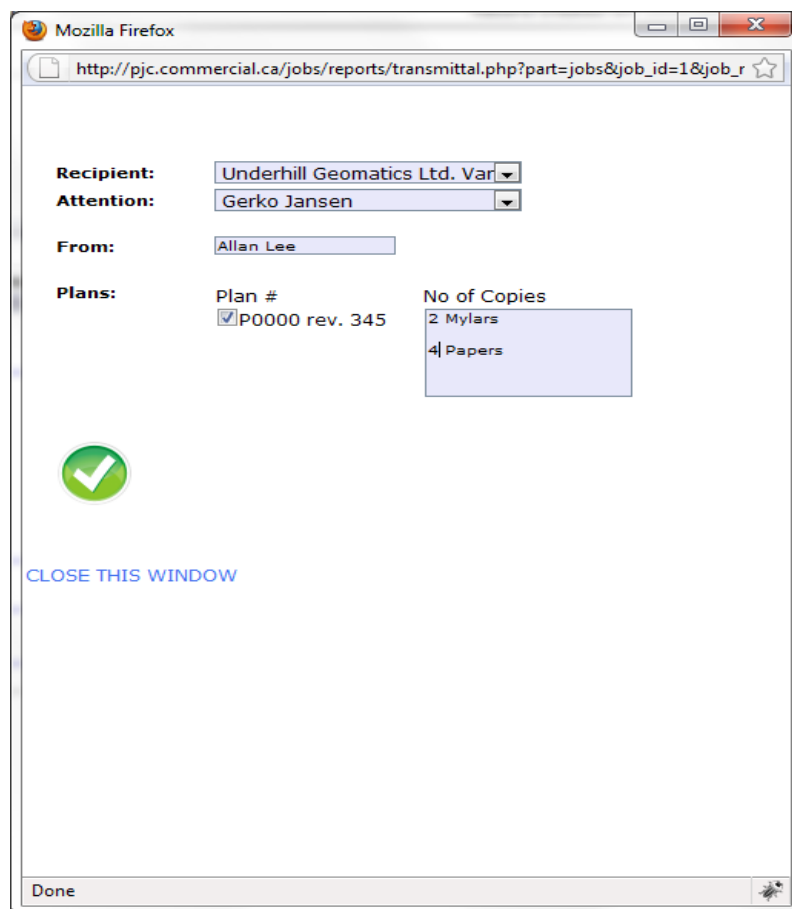
To print job labels simply click on "job label" in job view mode. Use the print button to print. Do not use the browser's print functionality, since it will print the whole website.

7.3 Transmittal Reports

In the land surveying industry we often send out products such as hard-copied plans to our clients or consultants. iPJC has the option to generate a transmittal with information from the database such as contacts, plan numbers and plan titles.

The transmittal is a .ODT (OpenOffice) based template what you have to modify for your own company. For more information on customizing your own template please see the installation manual.

To generate a transmittal, open the wizard by clicking on the "generate transmittal" button.



The screenshot shows a web browser window titled "Mozilla Firefox" with the address bar displaying "http://pjc.commercial.ca/jobs/reports/transmittal.php?part=jobs&jjob_id=1&jjob_r". The main content area contains a form for generating a transmittal. The form fields are as follows:

Recipient:	
Underhill Geomatics Ltd. Var	

Attention:	
Gerko Jansen	

From:	
Allan Lee	

Plans:	Plan #	No of Copies
☒	P0000 rev. 345	2 Mylars 4 Papers

Below the form is a green circular button with a white checkmark. Below the button is a blue link that says "CLOSE THIS WINDOW". At the bottom of the window is a status bar with the word "Done" and a small icon.

From this window you can select any contact related to that particular job as a recipient. In the from box put your own name. You can select plans related to that job and enter some information about the delivery. Click the green button to generate the transmittal.

You will receive a file via your browser. Rename and save the transmittal wherever you like.