Quality Assurance

User Manual

The instructions in this manual are for informational purposes only and are subject to change. Protonic Software GmbH assumes no liability. The software described in this manual requires a license.

The individual functions are described using screenshots. Depending on your easyjob license, operating system or Office version, the functions and screenshots you have in your environment may differ from this manual or may only be available in later versions.

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INTRODUCTION

Information about the structure and content of this document can be found here.

Important notice

This manual will help you get started with the easyjob 6 rental software Quality Assurance module.

The development of the easyjob rental software as well as the documentation has been done with great care. The individual program features are constantly checked through our Quality Assurance Process. However, errors can still occur.

Main Office

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Frankfurter Landstr. 52
63452 Hanau
Germany

http://www.protonic-software.com

Support

You can find more information about the support options on-line at http://www.protonic-software.com/en/easyjob/corporate/support/.

In addition, there is a support forum where you can exchange information with other users. The support forum can be found at http://forum.protonic-software.com

Training

We offer customized training programs for the following extensive topics.

To learn more, please visit our website at

http://www.protonic-software.com/en/service/training/ or contact our sales office at

sales@protonic-software.com.

About this manual

The individual functions are described using screenshots of easyjob license 6. Depending on your easyjob license, the forms you have in your environment may differ from the screenshots shown in the manual.

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How to use this manual

This document uses the following standards

Functions that require a license

Individual program functions are made available in your easyjob environment based on your license. This may concern individual program functions or entire modules.

Functions that are only available in individual modules are marked with minimum-edition symbols S, M, L or XL. Some functions are limited in easyjob S. There is no indication of this. You can find the limitations in the version comparison matrix on our website.

Functions that are only available by subscription are marked with the symbol e.

For example:

L	The function is only available in easyjob L and easyjob XL
L e	The function is only available in easyjob L and XL with a current subscription.

easyjob-specific terms

In order to make a description better understood, in some cases easyjob-specific terms are highlighted with a color.

For example:

With the Project and Job Groups, you also have the possibility to select a Template.

Work steps, buttons, actions and menu paths

Individual work steps, actions, menu paths or clicks are separated from each other or initiated by the symbol "⇨•".

Buttons, menus, tabs, etc. used in context are highlighted in color.

Example 1: Check the box in the Activating the List Editor field.

Example 2: easyjob Menu ⇨• View ⇨• Monthly Overview

Example 3: ⇨• Help

Example 4: ⇨• Ok

Reference to other chapters

References to other chapters and sections are underlined and displayed in color.

Example: See section Important information.

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Important information

Important information is highlighted in orange and presented with a light bulb.

Example:

This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important.

Special keys

Special keys are represented with the following symbols:

	Windows key
	Tabulator key
	Arrow keys
	Return key
	Context Menu key
	Escape key
	Function key 1
+ A	Control key. Keep the control key pressed down and press the A button.
+ H	Alt key. Keep the Alt key pressed down and also press the H button
	Delete key

Phrasing

In this manual and in the easyjob examples, terms such as employee, assistant, technician or carpenter are used both for men and for women.

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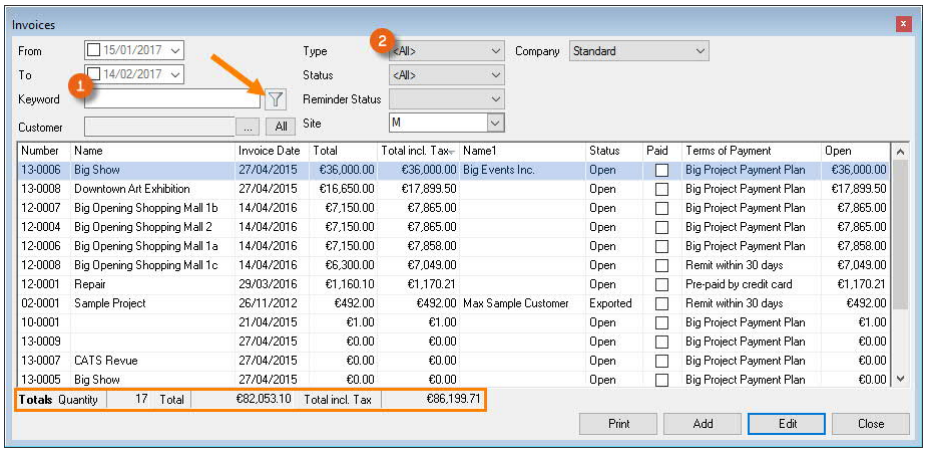
Screenshot explanations

The screenshots will be explained using numbers ① ② ③ and arrows → marked.

Screenshot highlights will be marked with orange frames.



Additional documentation

In order to make it easier to become acquainted with and consult the easyjob documentation, we have divided it into multiple sections.

You can find an overview of all documentation on the following website.

http://www.protonic-software.com/en/service/downloads/

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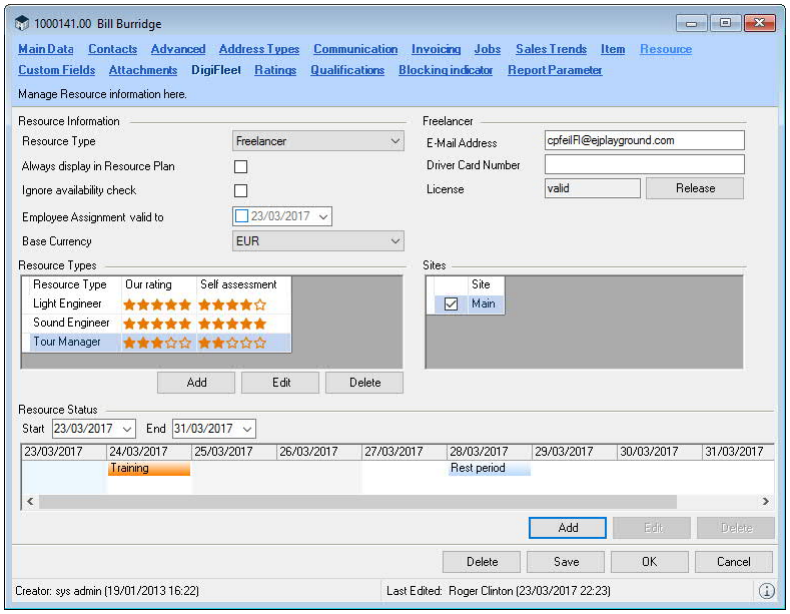
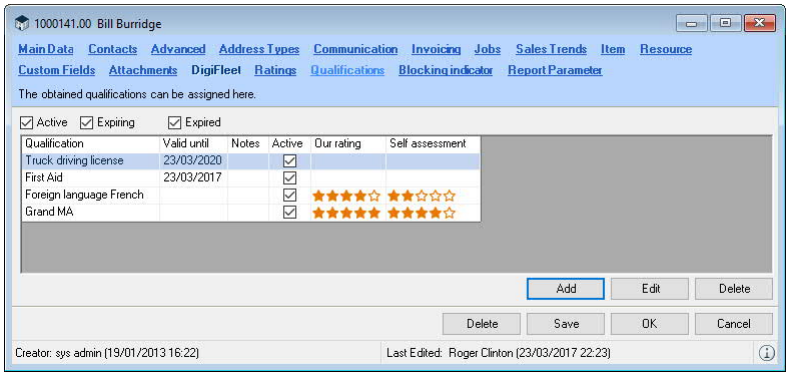
QUALITY ASSURANCE

The easyjob Quality Assurance module supports the safeguarding of your company's quality standards.

The easyjob Quality Assurance (QA) module makes it possible for you to take the qualities and skills of your internal and external employees into account during resource planning and to use them effectively. An event technician has, for example, certain skills in AV and in sound. With Quality Assurance, you can assess these skills and see the individual strengths of your personnel at a glance.

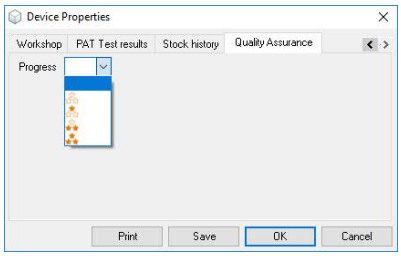


You can also register additional personnel skills (driver card, English knowledge, etc.) to plan in a more appropriate manner. For example, when you require employees who have been instructed or skilled in operating a personal lift or a complex light control panel. When assigning staff for a project, this ensures that staff with the required skills is booked for the equipment to be used.



You can assess the individual suppliers, internal and external Resources and schedulers within a project. It is also possible for your customer to assess the provided service on a website.

You can use a rating system to define the condition of each item and device.



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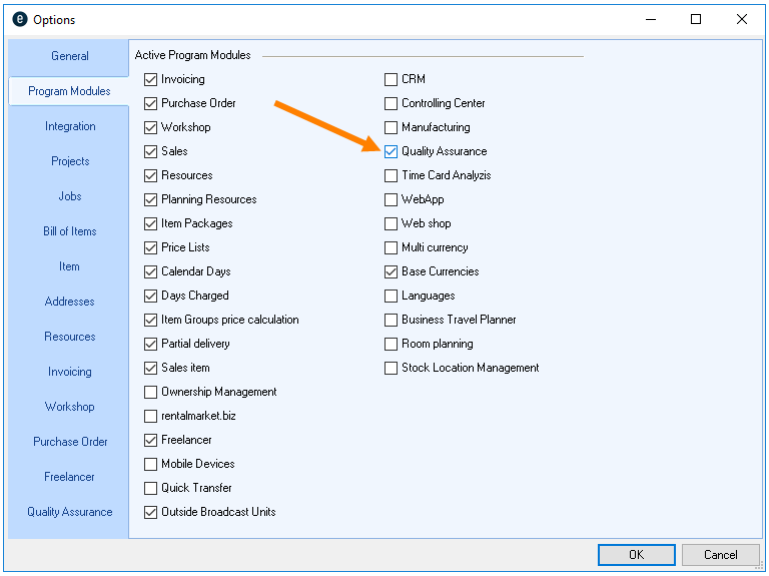
Installation and activation

Go to the easyjob program settings to activate the easyjob Quality Assurance module. A separate installation is not required.

Activate the Quality Assurance module:

1. easyjob Menu ⇨• Tools ⇨• Options
2. ⇨• Program Modules tab
3. Select Quality Assurance



4. ⇨• Ok

easyjob must be restarted to activate the settings.

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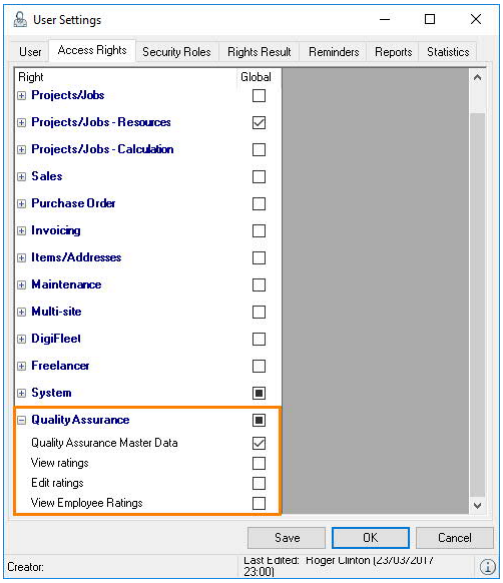
Configuration and settings

User settings

User rights for carrying out Quality Assurance, viewing or editing ratings are defined in the User Settings.

Assigning the Quality Assurance user right:

1. easyjob Menu ⇨• Tools ⇨• Manage Users
2. ⇨• Select a User
3. ⇨• Edit
4. ⇨• Access Rights tab
5. ⇨• General
6. Assign the desired rights



7. ⇨• Save
8. ⇨• Ok

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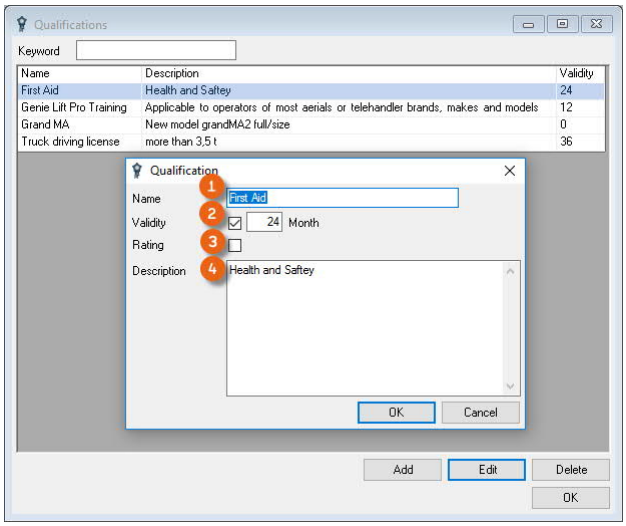
Defining skills

The skills that you would like to assign to your employees are defined in the easyjob Master Data. You can add as many skills as you need and in addition to the Name ① you can also indicate the Validity ②, the option for a Rating ③ and a Description ④.



Adding skills:

1. easyjob Menu ↪• Master Data ↪• Skills
2. ↪• Add
3. Enter the desired data
4. ↪• Ok

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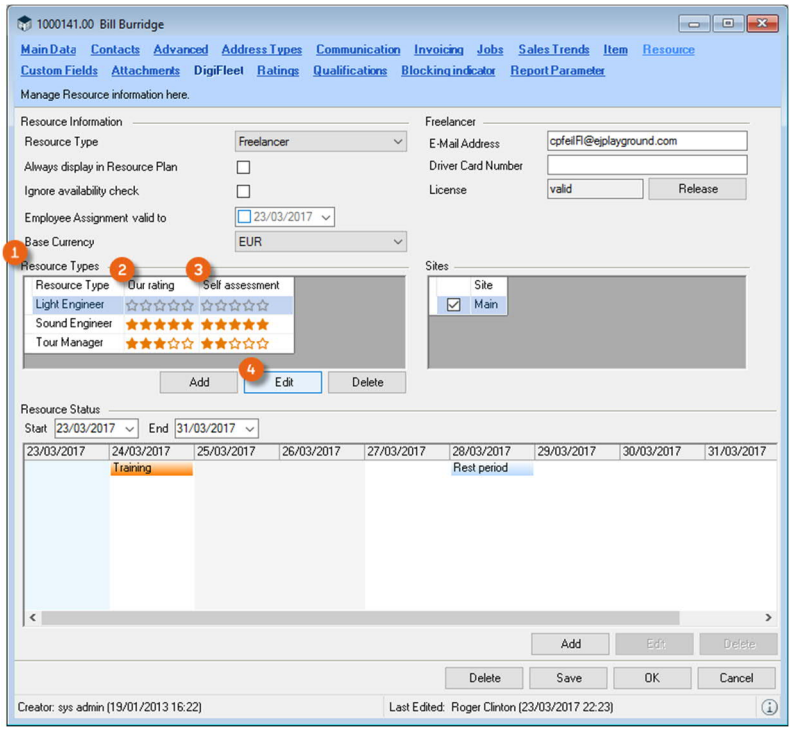
Qualifying Resources

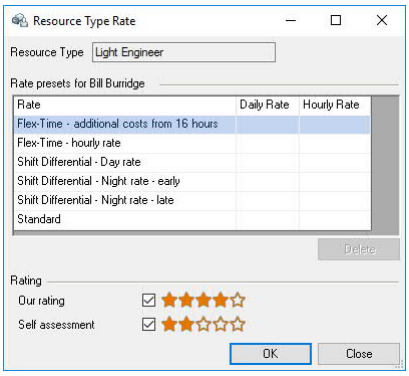
Assessing the quality of the resource type

In the Address Master Data you can define the Resource Type ① (e.g. AV technician, light technician, etc.) for which the employee will be used in your projects. In order to differentiate the areas in which employees have their strengths, you can assess the quality with which employees are proficient with respect to the Resource Type. With Edit ④ you can enter your own Rating ② and the Self assessment of the employee ③ (e.g. determined using a staff questionnaire) with respect to the Resource Type.



Assigning ratings for Resource Types:

1. easyjob Menu ⇨• Master Data ⇨• Addresses
2. Select Address ⇨• Edit
3. ⇨• Resource tab
4. ⇨• Select Resource Type
5. ⇨• Edit
6. Deifne your own rating and the self assessment of the employee



7. ⇨• Ok

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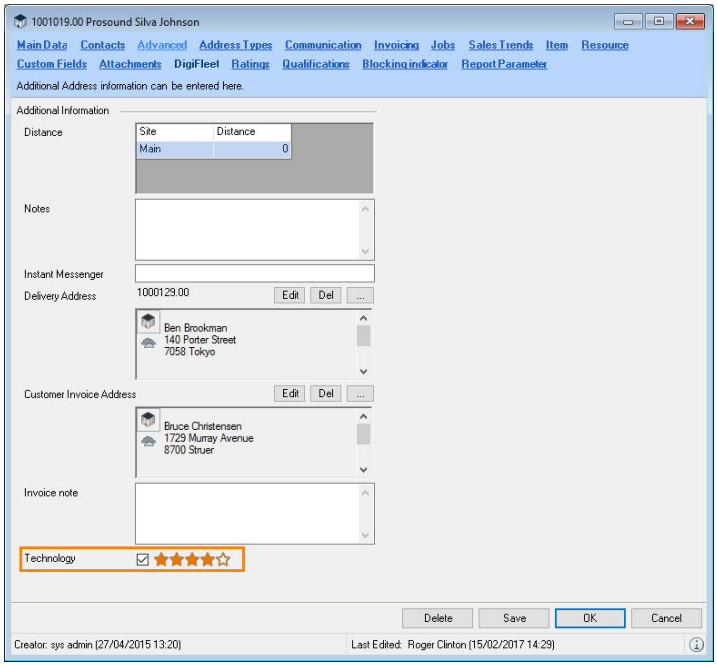
Specifying the minimum quality for a customer

In order to optimally meet the requirements of your customers, you can define a Minimum Rating for the Resources to be booked in the address master data. In this way you can control that for sensitive customers, only employees that fulfil the minimum quality for the respective resource type will be displayed during resource planning and be booked.

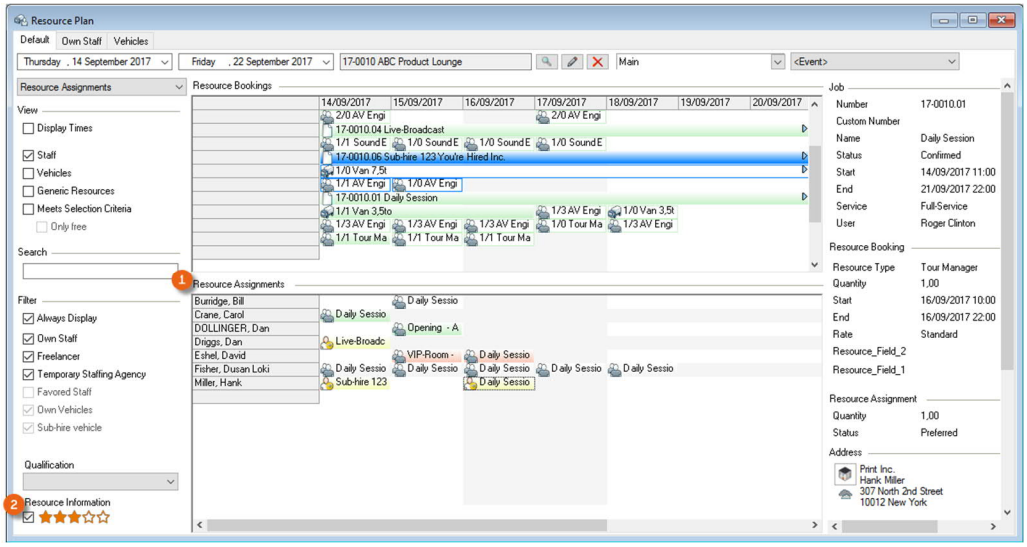


Determining the Minimum Rating:

1. easyjob Menu ➪• Master Data ➪• Addresses
2. Select Address ➪• Edit
3. Enter the Minimum Rating
4. ➪• Ok

Minimum rating in the Resource Plan

By activating the Quality filter ② the Resource Plan will only display Resources ① with a corresponding minimum rating.



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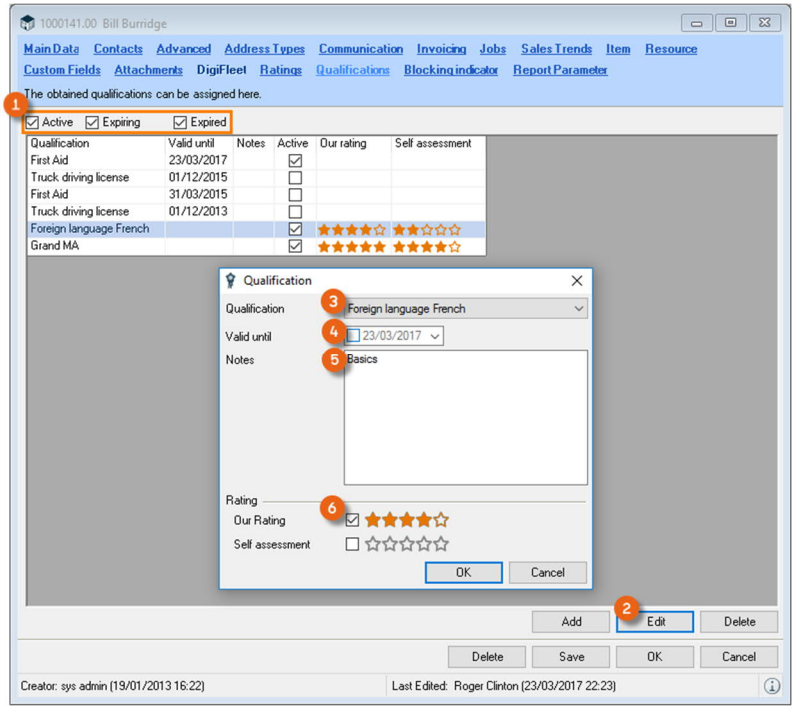
Employee skills

In order to assign additional skills to an employee, you can use the skills created in the Master Data (see also section Defining skills). You can use various Filters ① to obtain a clearer presentation. With Expiring, all skills are displayed that will lose their validity within the next 30 days. With Add or Edit ② you can make adjustments or additions. In addition to the predefined Skills ③, you can enter a Validity date ④ (if validity has been activated in the Master Data, as a time period, the current date plus the preset validity - e.g. 24 months - is suggested), Notes ⑤ and your Rating ⑥ (to do so, rating must be activated in the Master Data - if there is no rating it will be highlighted in gray).



Adding or editing a Skill:

1. easyjob Menu ⇨• Master Data ⇨• Addresses
2. Select the address
3. ⇨• Edit
4. ⇨• Skill tab
5. ⇨• Add or select the Skill and ⇨• Edit
6. Enter the data as required
7. ⇨• Ok

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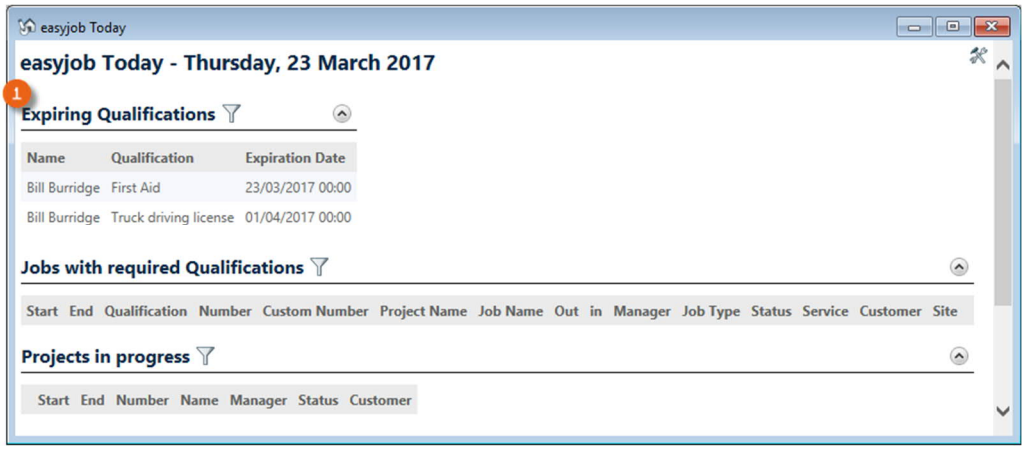
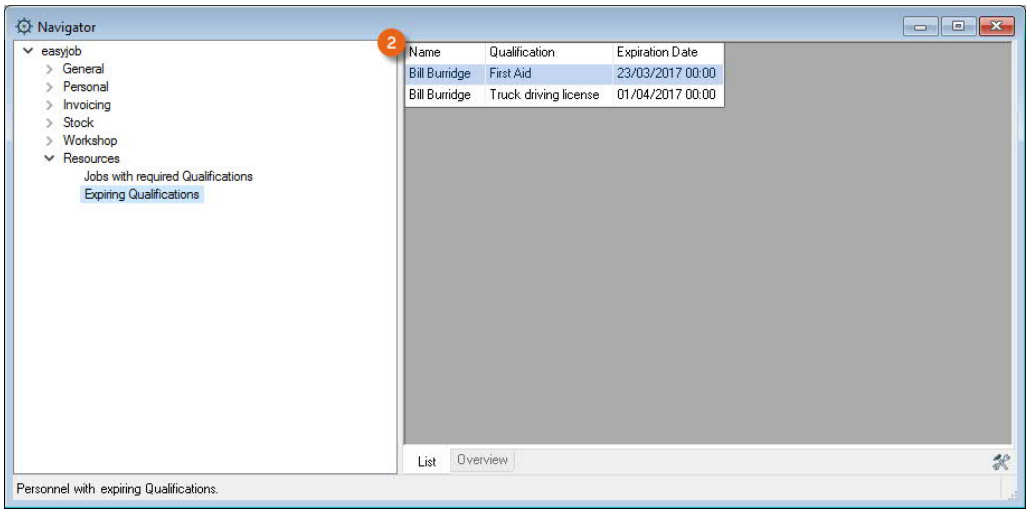
You can display Expiring Skills in easyjob Today ① and in the easyjob Navigator ②.





You can add the Expiring Skills and Jobs with Required Skills (see section Skilled Resources in a project) views via the settings. You can find more information about customizing easyjob Today and the easyjob Navigator in the easyjob User Manual on our website.

http://www.protonic-software.com/en/service/downloads/

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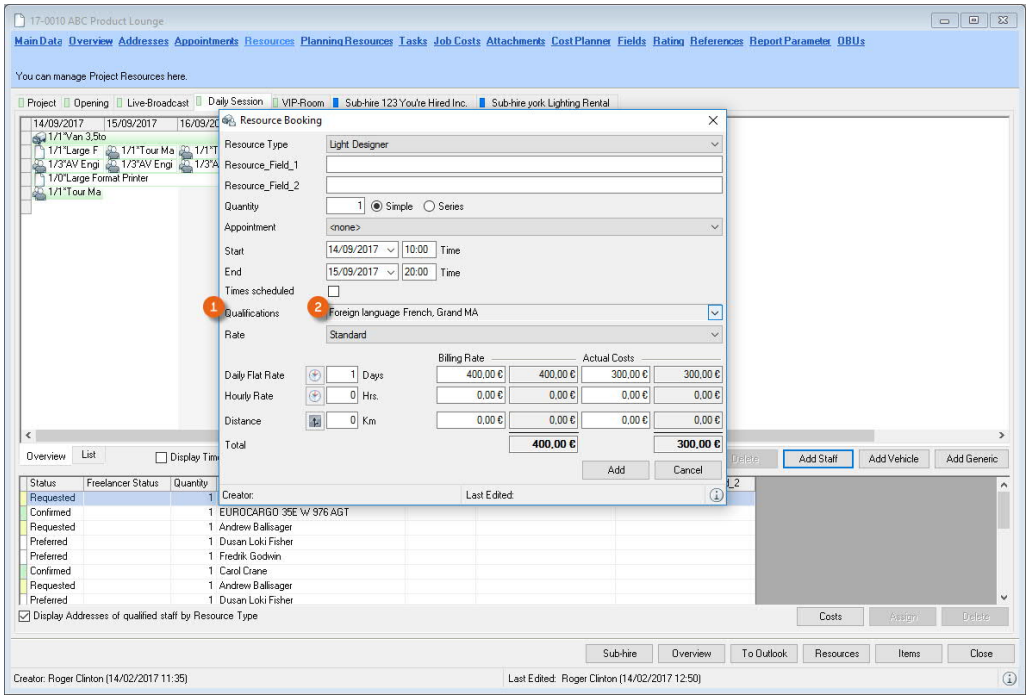
Skilled Resources in a project

In addition to the generally valid Skills, such as the annual safety at work instruction, or training as an in-house first-aider, you can assign Skills that make it easier for you to book Resources in a project. If for example a special light control panel is booked, you need skilled personnel to operate this challenging item in a satisfactory manner. easyjob offers you two options. First of all, you can also indicate the Skills ①, e.g. 'Grand MA' ② as a requirement under Resource Booking. When assigning, you will only be displayed employees who have this Skill.



Another option is to enter the required Skills for the Item. See also section Skills to operate an Item. If a staff member with the corresponding Skills is not booked, you will receive a warning message in the project overview.

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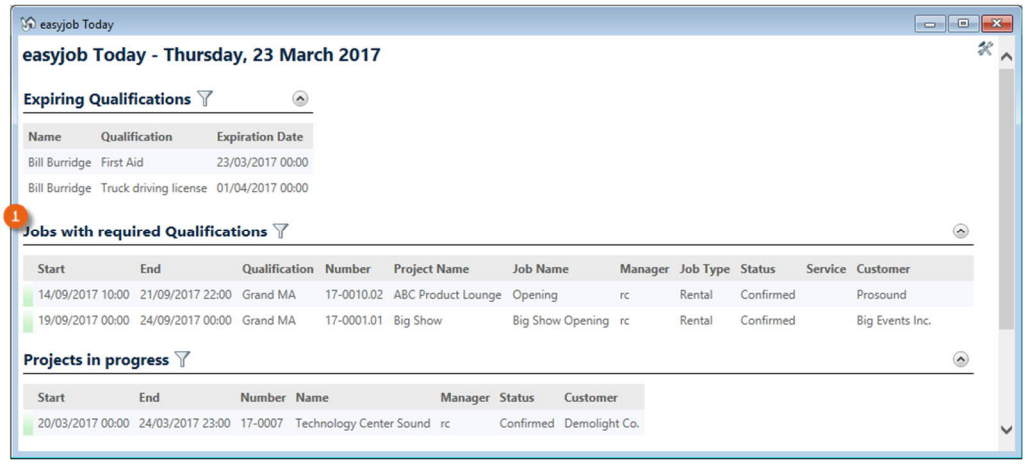
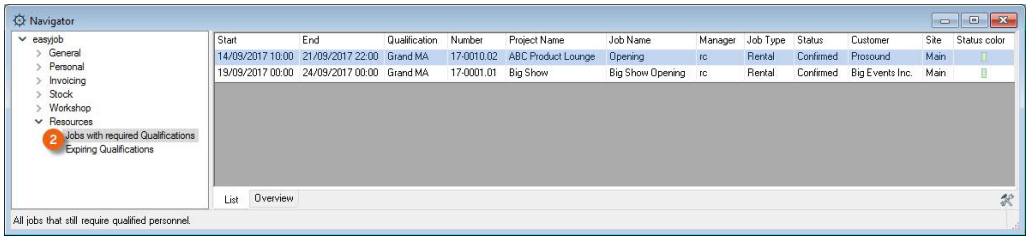
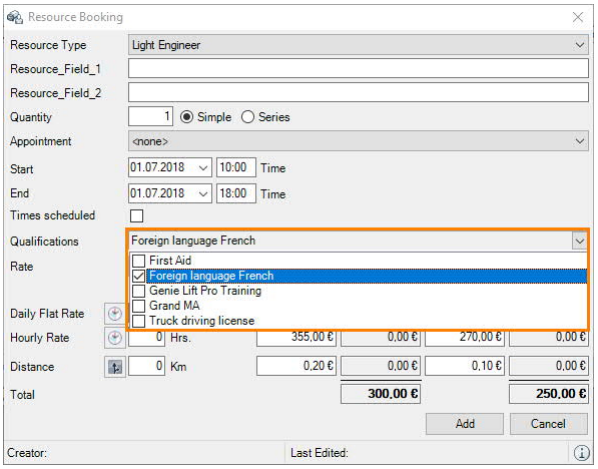
This information is also available to you in easyjob Today ① or in the easyjob Navigator ②.





Planning Resources with a Skill:

1. easyjob Menu ➪• View ➪• Jobs
2. Select the Job ➪• Edit
3. ➪• Resource tab
4. ➪• New Staff
5. Enter all relative data and specify the required Skills



6. ➪• Ok

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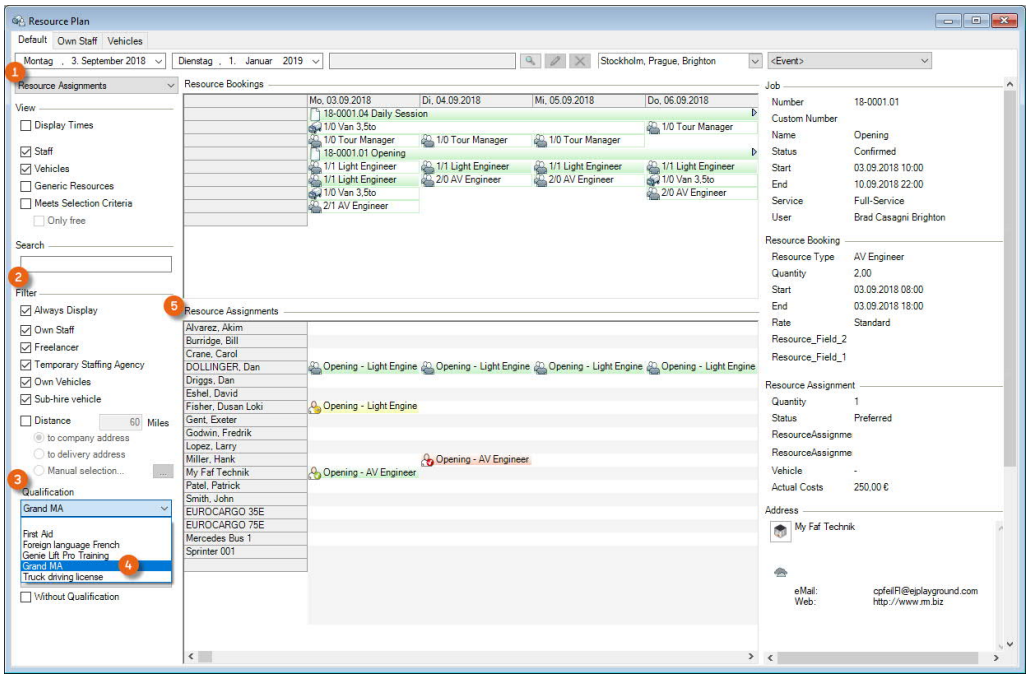
Skills in the Resource Plan

In the Resource Plan, under Resource Assignments ① you can select a Skill ③ e.g. Grand MA ④, as an additional filter function ②. Only Resources that have the selected Skill will only be displayed ⑤.



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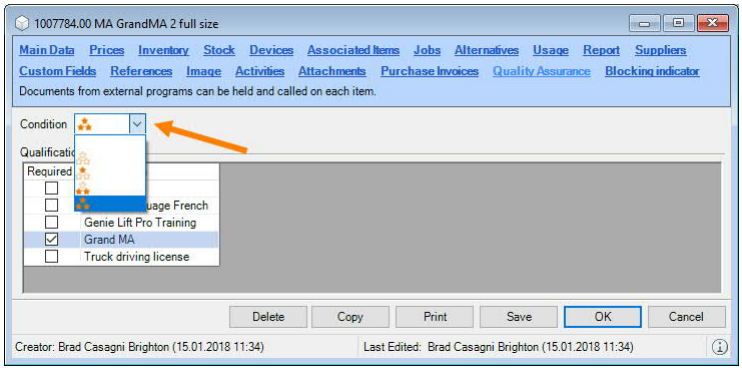
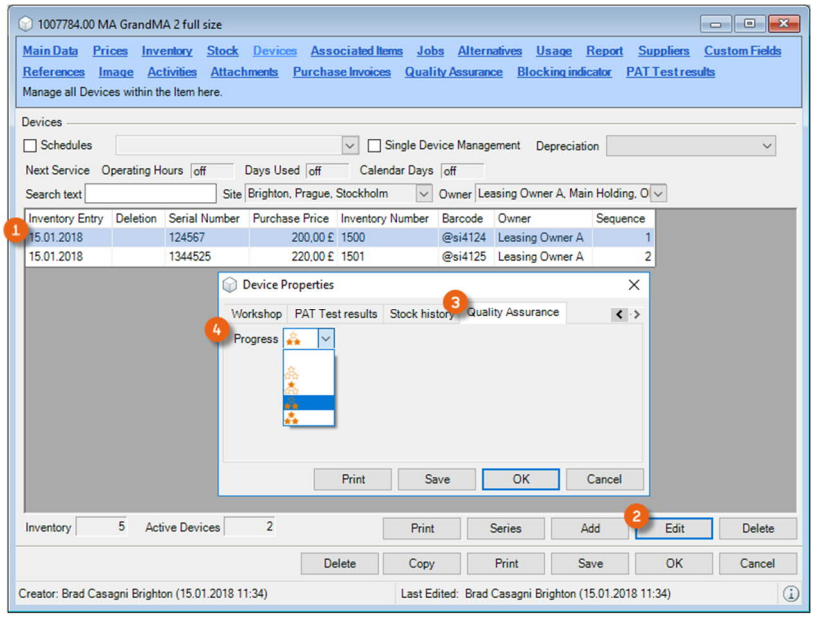
Skills to operate an Item

Evaluating the quality of an Item or Device

You can enter the qualitative condition of Items or individual Devices in the easyjob item Master Data. You can evaluate the condition of the Item on the Quality Assurance tab. You can assign zero to three stars for the condition of the Item.



You can manage the condition of individual Devices in the device properties.



1. easyjob Menu ↪• Master Data ↪• Items
2. Select the Item
3. ↪• Edit
4. ↪• Device tab
5. ↪• Select the Device ①
6. ↪• Edit ②
7. Quality Assurance tab ③
8. Assess the condition of the Device ④
9. ↪• Ok

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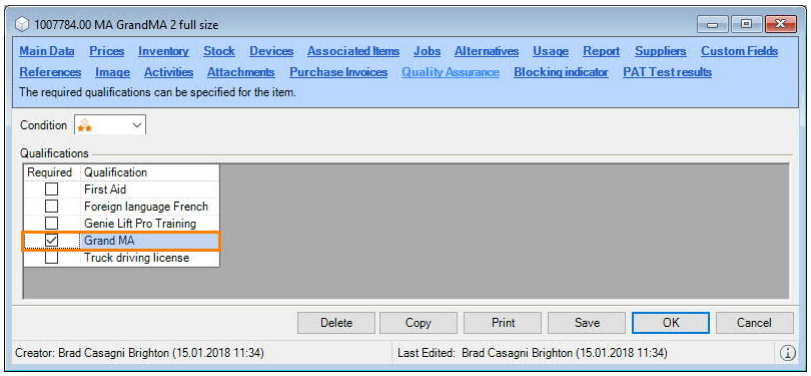
Quality Assurance for operation of an Item

To make sure that the rented Item is always booked together with the correct staff, you can use Quality Assurance in the Item Main Data to define the necessary Skills (e.g. Grand MA).

See also section Skilled Resources in a project.



Quality Assurance for operating an Item:

1. easyjob Menu ⇨• Master Data ⇨• Items
2. Select the Item
3. ⇨• Edit
4. ⇨• Quality Assurance tab
5. Check the required Skills
6. ⇨• Ok

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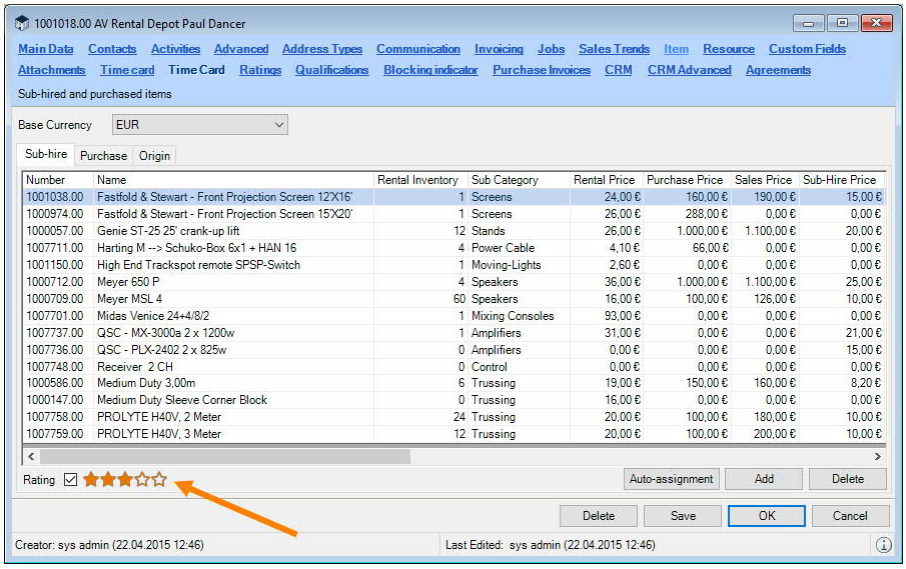
Qualifying suppliers

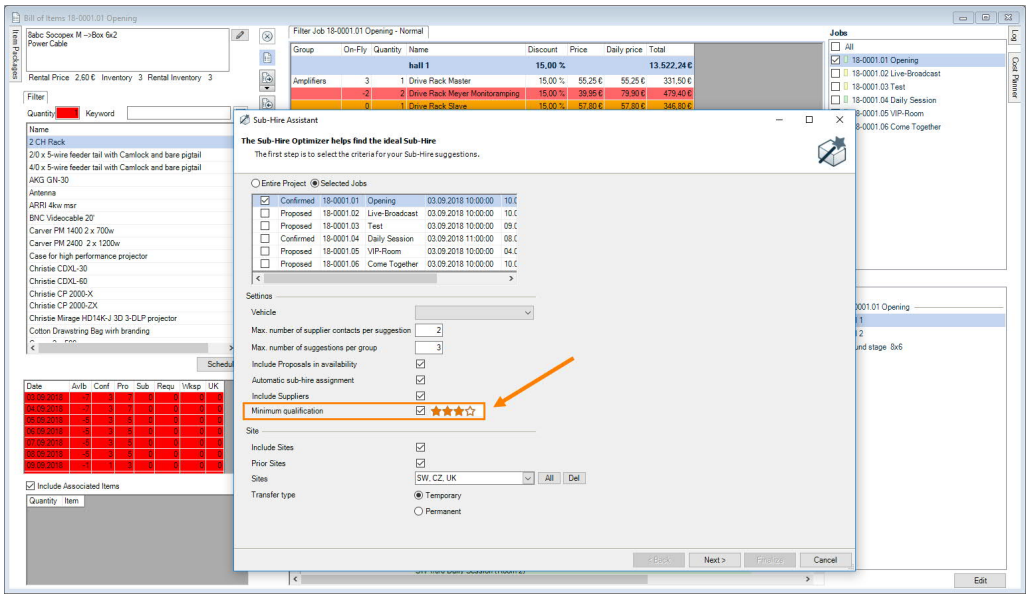
You can also rate the quality of your supplier's Items. You can assign the rating for suppliers in the Address Master Data.



Rating a supplier:

1. easyjob Menu ➪• Master Data ➪• Addresses
2. Select the supplier
3. ➪• Edit
4. ➪• Items tab
5. Enter the desired rating
6. ➪• Ok

If you use the Sub-Hire Wizard in the Bill of Items, you can indicate here the Minimum quality of your potential supplier, which should be included in the selection.



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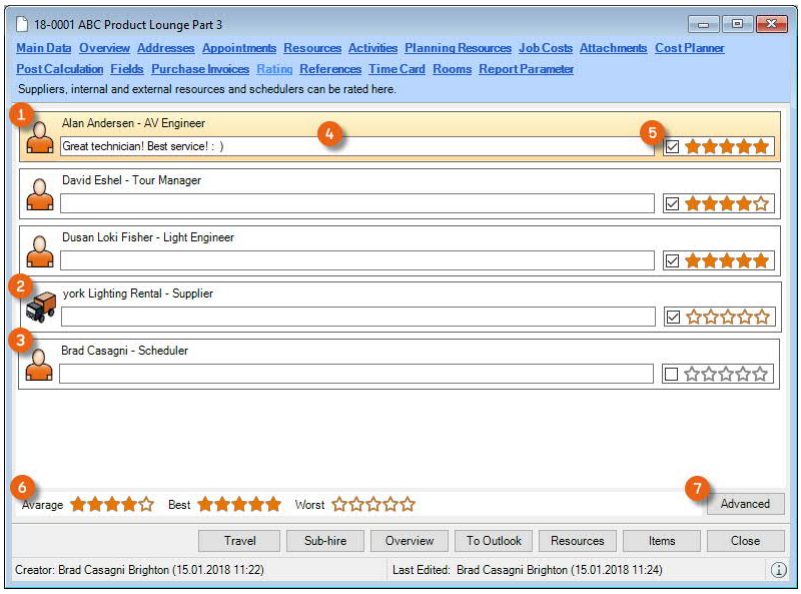
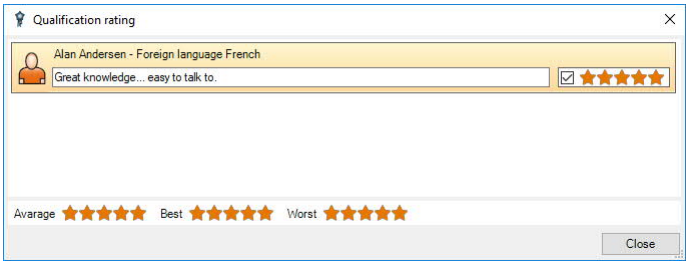
Rating in the Project

Within a Project, you can rate the performance of the Resources ①, Suppliers ② and Schedulers ③ that were used. In addition to a Comment ④, you can assign zero to five Stars ⑤. The average of all assigned Ratings as well as the best and worst rating are displayed in the Overview ⑥. With Advanced ⑦ you can assess the Skills of individual employees.



Assigning Ratings in the Project:

1. easyjob Menu ⇨• Projects ⇨• Edit Project
2. Select the Project ⇨• Ok
3. ⇨• Rating tab
4. Enter all desired Ratings
5. Select a Resource/Scheduler/Supplier
6. ⇨• Advanced
7. Rate the individual Skills



8. ⇨• Close
9. ⇨• Ok

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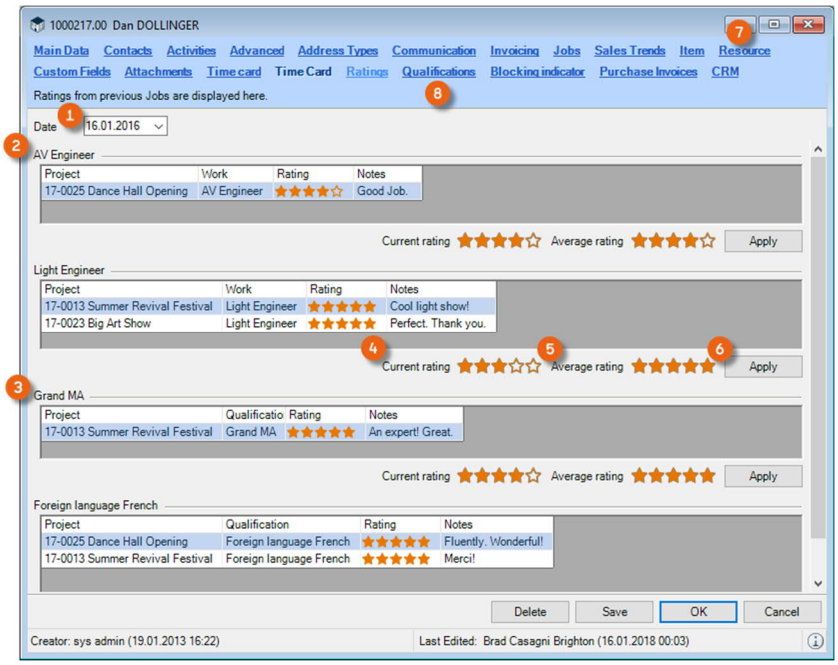
Employee rating

You can view the result of the Ratings from different Jobs for which employees were used in the past at any time in the Address Master Data. By entering a Date ① you can determine from when the Ratings should be displayed. Ratings are displayed separately according to Resource Type ② and Skills ③. For each area, there is a display of the Current Assessment ④ (from Resource ⑦ for a Resource Type or from skills ⑧) as well as the average Rating ⑤ for the displayed Projects. With Apply ⑥ you can accept the current Rating and therefore overwrite the previous Rating in the Resource Type or Skills.



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