



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	4
Important notice	5
Main Office	5
Support.....	5
Training	5
About this manual	5
How to use this manual.....	6
Additional documentation	8
Quality Assurance	9
Installation and activation	11
Configuration and settings	12
User settings	12
Defining skills.....	13
Qualifying Resources	14
Assessing the quality of the resource type	14
Specifying the minimum quality for a customer.....	15
Minimum rating in the Resource Plan.....	15
Employee skills	16
Skilled Resources in a project.....	18
Skills in the Resource Plan	20
Skills to operate an Item.....	21
Evaluating the quality of an Item or Device.....	21
Quality Assurance for operation of an Item.....	22
Qualifying suppliers.....	23
Rating in the Project.....	24
Employee rating	25

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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<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.

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 .

For example:

L	The function is only available in easyjob L and easyjob XL
L 	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**.

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

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

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

Screenshot explanations

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

Screenshot highlights will be marked with orange frames.

Invoices

From: 15/01/2017 To: 14/02/2017

Keyword: [magnifying glass icon]

Customer: [dropdown arrow]

Type: All Status: <All> Reminder Status: Site: M

Number	Name	Invoice Date	Total	Total incl. Tax	Name1	Status	Paid	Terms of Payment	Open
13-0006	Big Show	27/04/2015	€36,000.00	€36,000.00	Big Events Inc.	Open	<input type="checkbox"/>	Big Project Payment Plan	€36,000.00
13-0008	Downtown Art Exhibition	27/04/2015	€16,650.00	€17,899.50		Open	<input type="checkbox"/>	Big Project Payment Plan	€17,899.50
12-0007	Big Opening Shopping Mall 1b	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0004	Big Opening Shopping Mall 2	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0006	Big Opening Shopping Mall 1a	14/04/2016	€7,150.00	€7,858.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,858.00
12-0008	Big Opening Shopping Mall 1c	14/04/2016	€6,300.00	€7,049.00		Open	<input type="checkbox"/>	Remit within 30 days	€7,049.00
12-0001	Repair	29/03/2016	€1,160.10	€1,170.21		Open	<input type="checkbox"/>	Pre-paid by credit card	€1,170.21
02-0001	Sample Project	26/11/2012	€492.00	€492.00	Max Sample Customer	Exported	<input type="checkbox"/>	Remit within 30 days	€492.00
10-0001		21/04/2015	€1.00	€1.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€1.00
13-0009		27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
13-0007	CATS Revue	27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
13-0005	Big Show	27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
Totals		Quantity	17	Total	€82,053.10	Total incl. Tax		€86,199.71	

Print Add Edit Close

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/>

QUALITY ASSURANCE

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

Quality Assurance

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.

1000141.00 Bill BurrIDGE

Main Data Contacts Advanced Address Types Communication Invoicing Jobs Sales Trends Item Resource
Custom Fields Attachments DigiFleet Ratings Qualifications Blocking indicator Report Parameter

Manage Resource information here.

Resource Information
Resource Type: Freelancer
Always display in Resource Plan: ☐
Ignore availability check: ☐
Employee Assignment valid to: 23/03/2017
Base Currency: EUR

Freelancer
E-Mail Address: cpefflR@ejplayground.com
Driver Card Number:
License: valid Release

Resource Types

Resource Type	Our rating	Self assessment
Light Engineer	★★★★★	★★★★★
Sound Engineer	★★★★★	★★★★★
Tour Manager	★★★★★	★★★★★

Add Edit Delete

Resource Status
Start: 23/03/2017 End: 31/03/2017

23/03/2017	24/03/2017	25/03/2017	26/03/2017	27/03/2017	28/03/2017	29/03/2017	30/03/2017	31/03/2017
	Training				Rest period			

Add Edit Delete

Creator: sys admin (19/01/2013 16:22) Last Edited: Roger Clinton (23/03/2017 22:23)

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.

1000141.00 Bill BurrIDGE

Main Data Contacts Advanced Address Types Communication Invoicing Jobs Sales Trends Item Resource
Custom Fields Attachments DigiFleet Ratings Qualifications Blocking indicator Report Parameter

The obtained qualifications can be assigned here.

☒ Active ☒ Expiring ☒ Expired

Qualification	Valid until	Notes	Active	Our rating	Self assessment
Truck driving license	23/03/2020		<input checked="" type="checkbox"/>		
First Aid	23/03/2017		<input checked="" type="checkbox"/>		
Foreign language French			<input checked="" type="checkbox"/>	★★★★★	★★★★★
Grand MA			<input checked="" type="checkbox"/>	★★★★★	★★★★★

Add Edit Delete

Creator: sys admin (19/01/2013 16:22) Last Edited: Roger Clinton (23/03/2017 22:23)

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.

Device Properties

Workshop PAT Test results Stock history Quality Assurance

Progress:

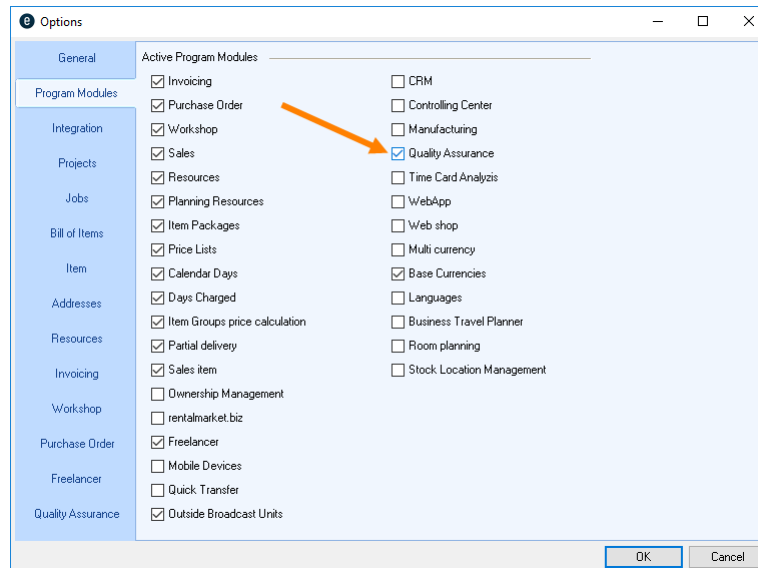
Print Save OK Cancel

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.

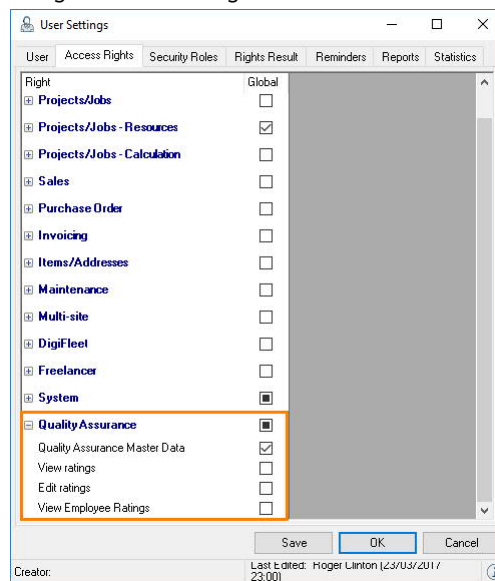
Configuration and settings

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:

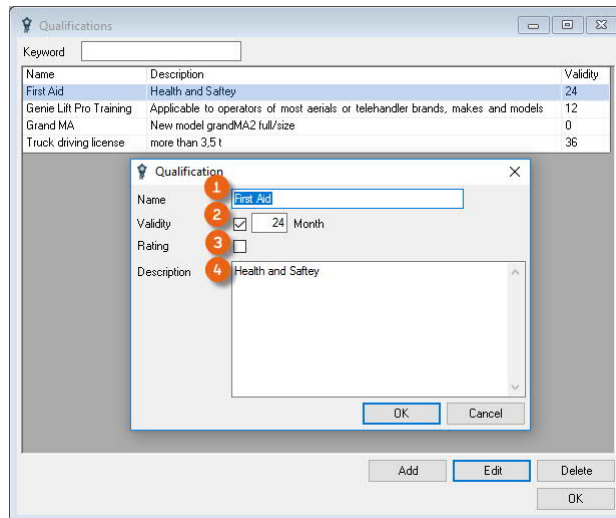
1. easyjob Menu ➞ Tools ➞ Manage Users
2. ➞ Select a User
3. ➞ Edit
4. ➞ Access Rights tab
5. ➞ General
6. Assign the desired rights



7. ➞ Save
8. ➞ Ok

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

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. Define your own rating and the self assessment of the employee

7. ⇌ • Ok

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:

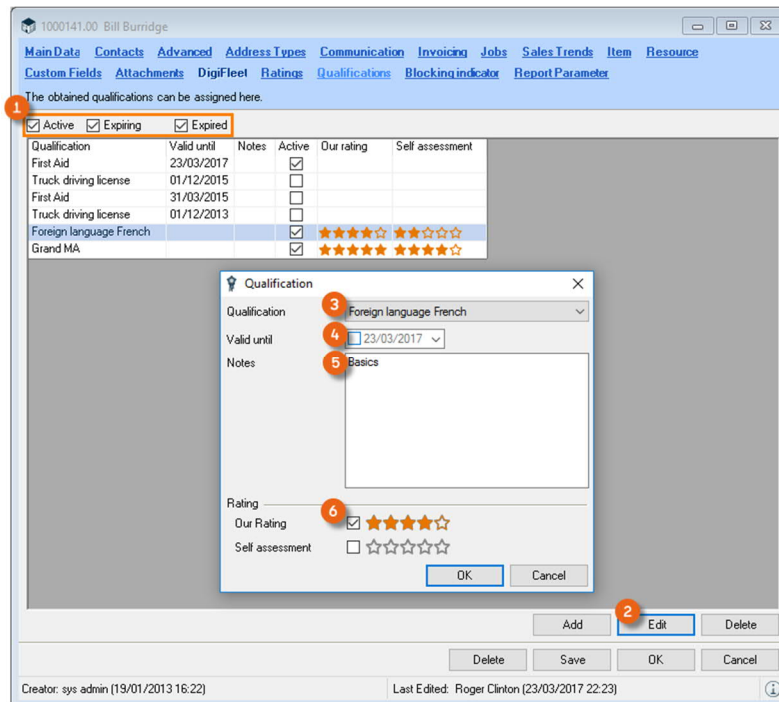
1. easyjob Menu ➡ • Master Data ➡ • Addresses
2. Select Address ➡ • Edit
3. Enter the Minimum Rating
4. ➡ • Ok

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.

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).

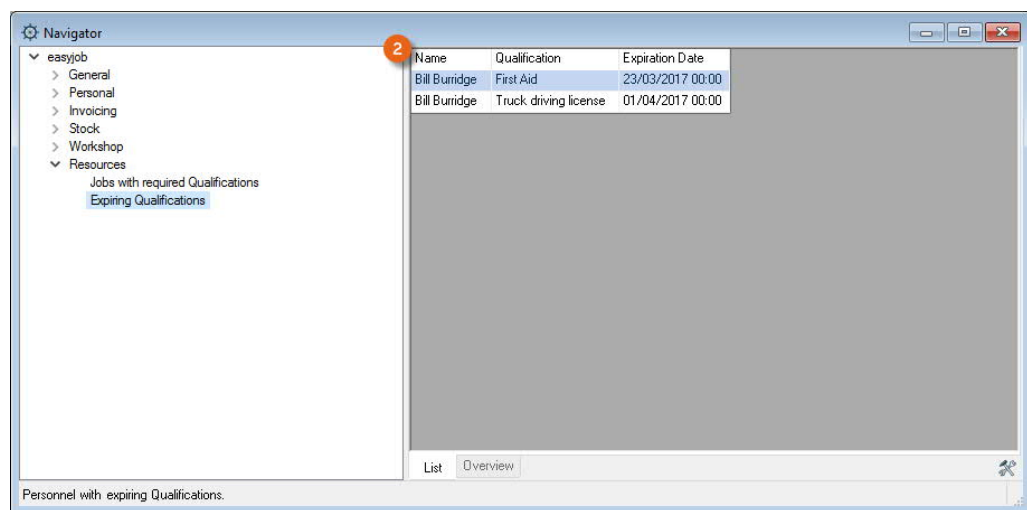
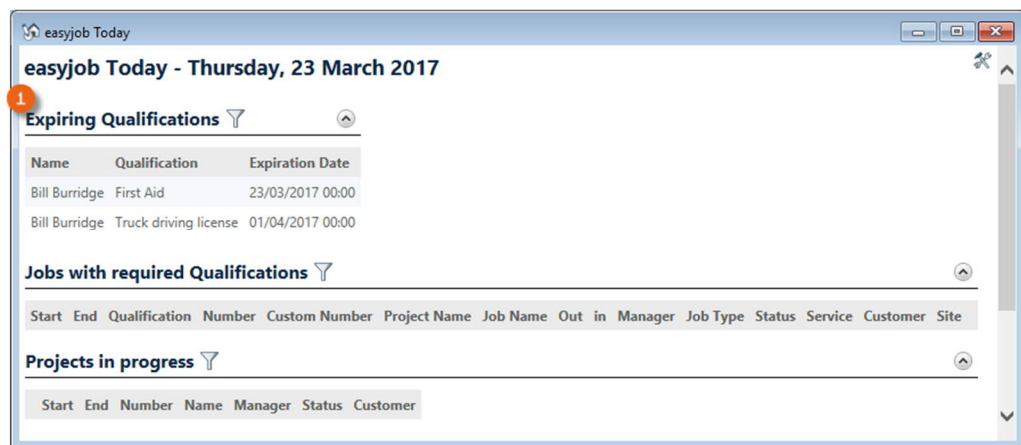


Adding or editing a Skill:

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](#)

Quality Assurance - Qualifying Resources

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/>

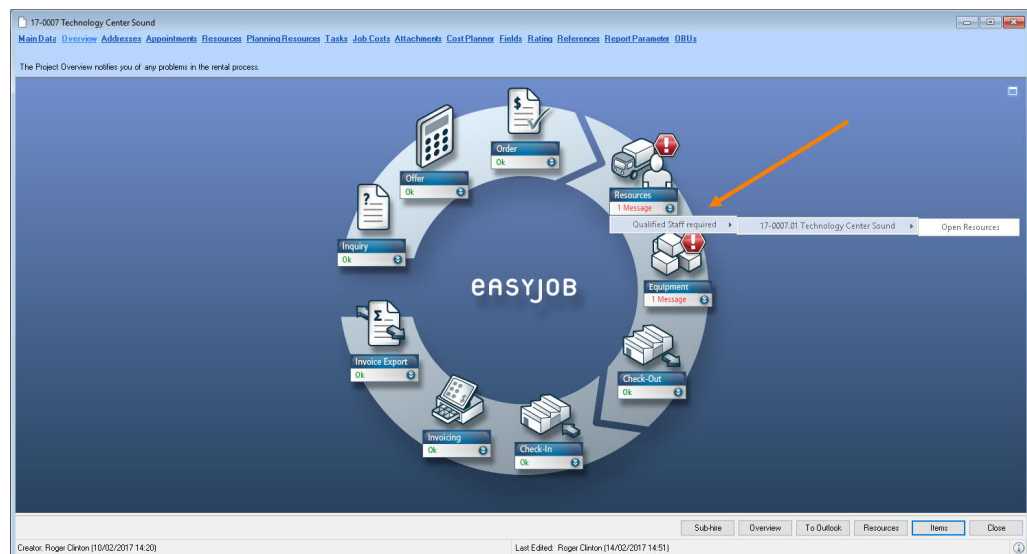
Skilled Resources in a project

In addition to the generally valid Skills, such as the annual safety at work instruction, or training as an in-house first-aidier, 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.

The screenshot shows the 'Resource Booking' dialog box in the easyjob software. The dialog is titled '17-0010 ABC Product Lounge' and has a menu bar with options: Main Data, Overview, Addresses, Appointments, Resources, Planning, Resources, Tasks, Job Costs, Attachments, Cost Planner, Fields, Rating, References, Report Parameters, DBUs. Below the menu bar, there is a section 'You can manage Project Resources here.' with tabs for Project, Opening, Live-Broadcast, Daily Session, VIP-Room, Sub-hire 123 You're Hired Inc., and Sub-hire your Lighting Rental. The 'Resources' tab is selected, showing a list of resources with columns for Status, Freelancer Status, and Quantity. The 'Resource Booking' dialog box is open, showing fields for Resource Type (Light Designer), Resource_Field_1, Resource_Field_2, Quantity (1), Appointment (none), Start (14/09/2017 10:00), End (15/09/2017 20:00), Times scheduled (checked), and Qualifications (Foreign language French, Grand MA). The dialog also displays a table for Billing Rate and Actual Costs.

	Billing Rate	Actual Costs
Daily Flat Rate	400.00 €	300.00 €
Hourly Rate	0.00 €	0.00 €
Distance	0.00 €	0.00 €
Total	400.00 €	300.00 €

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.



Quality Assurance - Qualifying Resources

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

The image shows two screenshots of the easyjob software interface. The top screenshot is the 'easyjob Today' window, dated Thursday, 23 March 2017. It features three sections: 'Expiring Qualifications' with a table listing Bill Burrige's First Aid and Truck driving license; 'Jobs with required Qualifications' (marked with a red circle ①) with a table showing jobs like 'ABC Product Lounge' and 'Big Show'; and 'Projects in progress' with a table showing 'Technology Center Sound'. The bottom screenshot is the 'easyjob Navigator' window. It has a left sidebar with a tree view where 'Jobs with required Qualifications' is selected (marked with a red circle ②). The main area displays a table of jobs, including 'ABC Product Lounge' and 'Big Show', with columns for Start, End, Qualification, Number, Project Name, Job Name, Manager, Job Type, Status, Customer, Site, and Status color. At the bottom, it says 'All jobs that still require qualified personnel.'

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

The image shows the 'Resource Booking' dialog box. It contains fields for Resource Type (set to 'Light Engineer'), Resource_Field_1, Resource_Field_2, Quantity (set to 1), Appointment (<none>), Start (01.07.2018 10:00), End (01.07.2018 18:00), and Times scheduled (unchecked). The Qualifications section has a dropdown menu with 'Foreign language French' selected and highlighted with an orange box. Below it are checkboxes for 'First Aid', 'Foreign language French' (checked), 'Genie Lift Pro Training', 'Grand MA', and 'Truck driving license'. The Rate section includes 'Daily Flat Rate' (0 Hrs.), 'Hourly Rate' (355,00 €), 'Distance' (0 Km), and 'Total' (300,00 €). There are also fields for '270,00 €' and '250,00 €'. At the bottom, there are 'Add' and 'Cancel' buttons, and fields for 'Creator:' and 'Last Edited:'.

6. ⇐ • Ok

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.

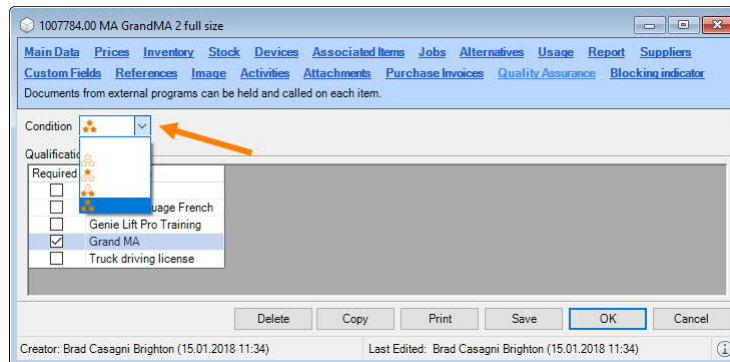
The screenshot displays the 'Resource Plan' software interface. The top navigation bar includes tabs for 'Default', 'Own Staff', and 'Vehicles'. The main area is divided into several sections:

- Resource Assignments (①):** A list of assignments for various dates (Mo, 03.09.2018; Di, 04.09.2018; Mi, 05.09.2018; Do, 06.09.2018). Assignments include roles like '1/0 Van 3.5t', '1/0 Tour Manager', '1/1 Light Engineer', '2/0 AV Engineer', and '2/1 AV Engineer'.
- Filter (②):** A section on the left with checkboxes for 'Always Display', 'Own Staff', 'Freelancer', 'Temporary Staffing Agency', 'Own Vehicles', and 'Sub-hire vehicle'. It also includes a 'Distance' filter (60 Miles) and a 'Qualification' dropdown menu.
- Qualification (③):** A dropdown menu showing 'Grand MA' (④) as the selected skill. Other options include 'First Aid', 'Foreign language French', 'Genie Lift Pro Training', and 'Truck driving license'.
- Resource Assignments (⑤):** A list of resources assigned to the selected skill, including names like 'Alvarez, Akim', 'Burridge, Bill', 'Crane, Carol', 'DOLLINGER, Dan', 'Driggs, Dan', 'Eshel, David', 'Fisher, Dusan Leki', 'Gent, Exeter', 'Goswin, Fredrik', 'Lopez, Larry', 'Miller, Hank', 'My Fal Technik', 'Patel, Patrick', 'Smith, John', 'EUROCARGO 35E', 'EUROCARGO 75E', 'Mercedes Bus 1', and 'Sprinter 001'.
- Job Details:** A sidebar on the right showing details for a specific job, including 'Number', 'Custom Number', 'Name', 'Status', 'Start', 'End', 'Service', 'User', 'Resource Booking', 'Resource Type', 'Quantity', 'Start', 'End', 'Rate', 'Resource_Field_2', 'Resource_Field_1', 'Resource Assignment', 'Quantity', 'Status', 'ResourceAssignme', 'Vehicle', 'Actual Costs', 'Address', 'eMail', and 'Web'.

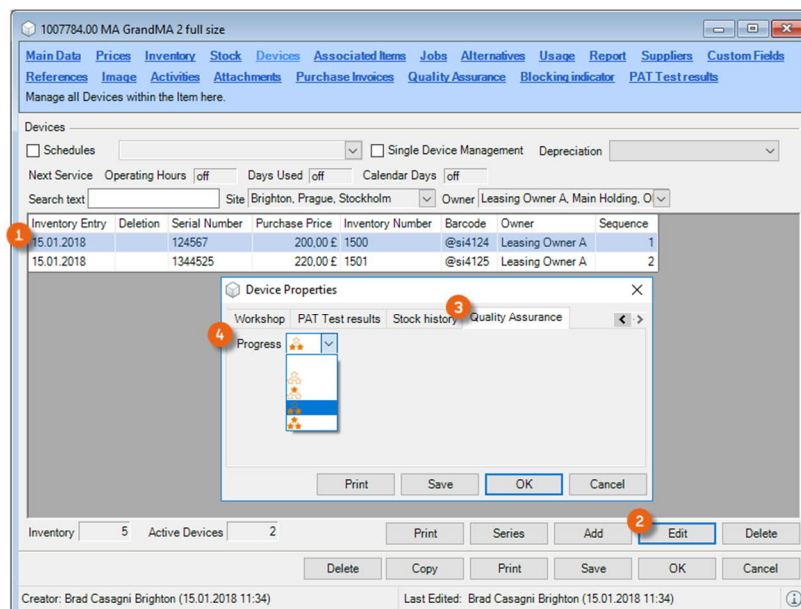
Skills to operate an Item

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.

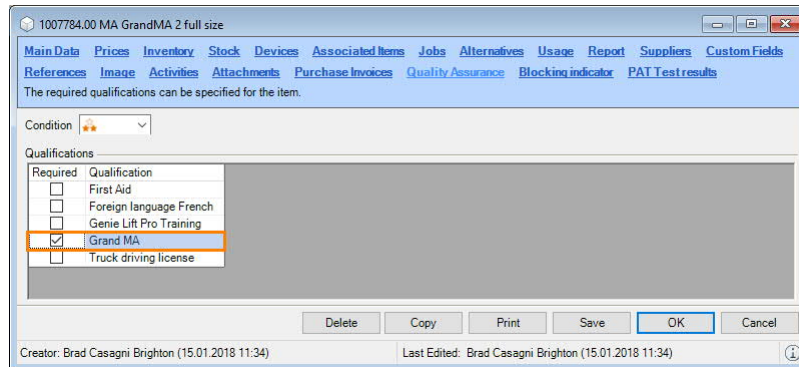


1. easyjob Menu ➡ Master Data ➡ Items
2. Select the Item
3. ➡ Edit
4. ➡ Device tab
5. ➡ Select the Device ①
6. ➡ Edit ②
7. Quality Assurance tab ③
8. Assess the condition of the Device ④
9. ➡ Ok






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](#)

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.

1001018.00 AV Rental Depot Paul Dancer

Main Data | Contacts | Activities | Advanced | Address Types | Communication | Invoicing | Jobs | Sales Trends | Item | Resource | Custom Fields

Attachments | Time card | Time Card | Ratings | Qualifications | Blocking indicator | Purchase Invoices | CRM | CRM Advanced | Agreements

Sub-hired and purchased items

Base Currency: EUR

Sub-hire	Purchase	Origin	Number	Name	Rental Inventory	Sub Category	Rental Price	Purchase Price	Sales Price	Sub-Hire Price
			1001038.00	Fastfold & Stewart - Front Projection Screen 12X16'		1 Screens	24,00 €	160,00 €	190,00 €	15,00 €
			1000974.00	Fastfold & Stewart - Front Projection Screen 15X20'		1 Screens	26,00 €	288,00 €	0,00 €	0,00 €
			1000067.00	Genie ST-25 25' crank-up lift		12 Stands	26,00 €	1.000,00 €	1.100,00 €	20,00 €
			1007711.00	Harting M -> Schuko-Box 6x1 + HAN 16		4 Power Cable	4,10 €	66,00 €	0,00 €	0,00 €
			1001150.00	High End Tracksport remote SPSP-Switch		1 Moving-Lights	2,60 €	0,00 €	0,00 €	0,00 €
			1000712.00	Meyer 650 P		4 Speakers	36,00 €	1.000,00 €	1.100,00 €	25,00 €
			1000709.00	Meyer MSL 4		60 Speakers	16,00 €	100,00 €	126,00 €	10,00 €
			1007701.00	Midas Venice 24-4/8/2		1 Mixing Consoles	93,00 €	0,00 €	0,00 €	0,00 €
			1007737.00	QSC - MX-3000a 2 x 1200w		1 Amplifiers	31,00 €	0,00 €	0,00 €	21,00 €
			1007736.00	QSC - PLX-2402 2 x 825w		0 Amplifiers	0,00 €	0,00 €	0,00 €	15,00 €
			1007748.00	Receiver 2 CH		0 Control	0,00 €	0,00 €	0,00 €	0,00 €
			1000586.00	Medium Duty 3,00m		6 Trussing	19,00 €	150,00 €	160,00 €	8,20 €
			1000147.00	Medium Duty Sleeve Corner Block		0 Trussing	16,00 €	0,00 €	0,00 €	0,00 €
			1007758.00	PROLYTE H40V, 2 Meter		24 Trussing	20,00 €	100,00 €	180,00 €	10,00 €
			1007759.00	PROLYTE H40V, 3 Meter		12 Trussing	20,00 €	100,00 €	200,00 €	10,00 €

Rating: ☒ ★★★★★

Auto-assignment Add Delete

Delete Save OK Cancel

Creator: sys admin (22.04.2015 12:46) Last Edited: sys admin (22.04.2015 12:46)

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.

Bill of Items 18-0001.01 Opening

Filter Job 18-0001.01 Opening - Normal

Group	On-Fly	Quantity	Name	Discount	Price	Daily price	Total
			hall 1	15,00 %		13.522,24 €	
Amplifiers	3	1	Drive Rack Master	15,00 %	55,25 €	55,25 €	331,50 €
	-2	2	Drive Rack Meyer Monitoring	15,00 %	39,95 €	79,90 €	479,40 €
	0	1	Drive Rack Slave	15,00 %	57,80 €	57,80 €	345,30 €

Sub-Hire Assistant

The Sub-Hire Optimizer helps find the ideal Sub-Hire.

The first step is to select the criteria for your Sub-Hire suggestions.

Entire Project Selected Jobs

Confirmed 18-0001.01 Opening 03.09.2018 10:00:00 10.0

Proposed 18-0001.02 Live-Broadcast 03.09.2018 10:00:00 10.0

Proposed 18-0001.03 Test 03.09.2018 10:00:00 09.0

Confirmed 18-0001.04 Daily Session 03.09.2018 11:00:00 08.0

Proposed 18-0001.05 VIP-Room 03.09.2018 10:00:00 04.0

Proposed 18-0001.06 Come Together 03.09.2018 10:00:00 10.0

Settings

Vehicle

Max. number of supplier contacts per suggestion 2

Max. number of suggestions per group 3

Include Proposals in availability ☒

Automatic sub-hire assignment ☒

Include Suppliers ☒

Minimum qualification ☒ ★★★★★

Site

Include Sites ☒

Prior Sites ☒

Sites SW, CZ, UK All Del

Transfer type ☒ Temporary ☐ Permanent

Back Next > Finish Cancel

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

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.

1000217.00 Dan DOLLINGER

Main Data Contacts Activities Advanced Address Types Communication Invoicing Jobs Sales Trends Item Resource
Custom Fields Attachments Time card Time Card Ratings Qualifications Blocking indicator Purchase Invoices CRM

Ratings from previous Jobs are displayed here.

Date 16.01.2016

AV Engineer

Project	Work	Rating	Notes
17-0025 Dance Hall Opening	AV Engineer	★★★★☆	Good Job.

Current rating ★★★★★ Average rating ★★★★★ Apply

Light Engineer

Project	Work	Rating	Notes
17-0013 Summer Revival Festival	Light Engineer	★★★★★	Cool light show!
17-0023 Big Art Show	Light Engineer	★★★★★	Perfect. Thank you.

Current rating ★★★★★ Average rating ★★★★★ Apply

Grand MA

Project	Qualification	Rating	Notes
17-0013 Summer Revival Festival	Grand MA	★★★★★	An expert! Great.

Current rating ★★★★★ Average rating ★★★★★ Apply

Foreign language French

Project	Qualification	Rating	Notes
17-0025 Dance Hall Opening	Foreign language French	★★★★★	Fluently. Wonderful!
17-0013 Summer Revival Festival	Foreign language French	★★★★★	Merci!

Delete Save OK Cancel

Creator: sys admin (19.01.2013 16:22) Last Edited: Brad Casagni Brighton (16.01.2018 00:03)