# QBuild Client Web Portal

## User Guide

## Welcome to eBusiness!

A secure, online web application, the QBuild Web Portal allows clients to:

- request work online
- receive notifications about work
- receive QBuild Customer Job Statements, and:
- update asset details

**Note:**

You can still interact with us using existing methods of transaction, but we encourage you to make use of this technology.

**This user reference guide will provide further detail and instructions about accessing and using the QBuild Web Portal and QBuild Web View.**

# What you will find in this user guide

# 1. Help and registration

Clients must be registered to enjoy the benefits of using e-business through the QBuild Web Portal. If you are unsure of your registration details or if you are having difficulty using the QBuild Web Portal, please contact your Client Program Manager at QBuild Head Office.

# 2. What can you do using the QBuild Client Web Portal?

## Web View QBuild Business Online

This is a secure environment for clients to conduct online business with QBuild. Users can access this application using a log in and password issued by QBuild.

*QBuild Business Online* enables registered users to:

- raise a work request
- manage requests for work using the inbox
- receive and approve or reject QBuild customer job statements
- create asset updates.

## Administration *(available through Web View)*

This function allows users to create and maintain new folders within an electronic filing system.

# 3. Getting started

## 3.1 Logging in to the Web Portal

You must be registered to access the QBuild Web Portal. For more information on how to register, refer to the 'Help and registration' section at the beginning of this guide.

### Step 1

Visit https://axiscloudplatform.com/mincomWebApp/QBuildWV.do



**Add this URL to your Internet 'favourites' folder for ease of access**

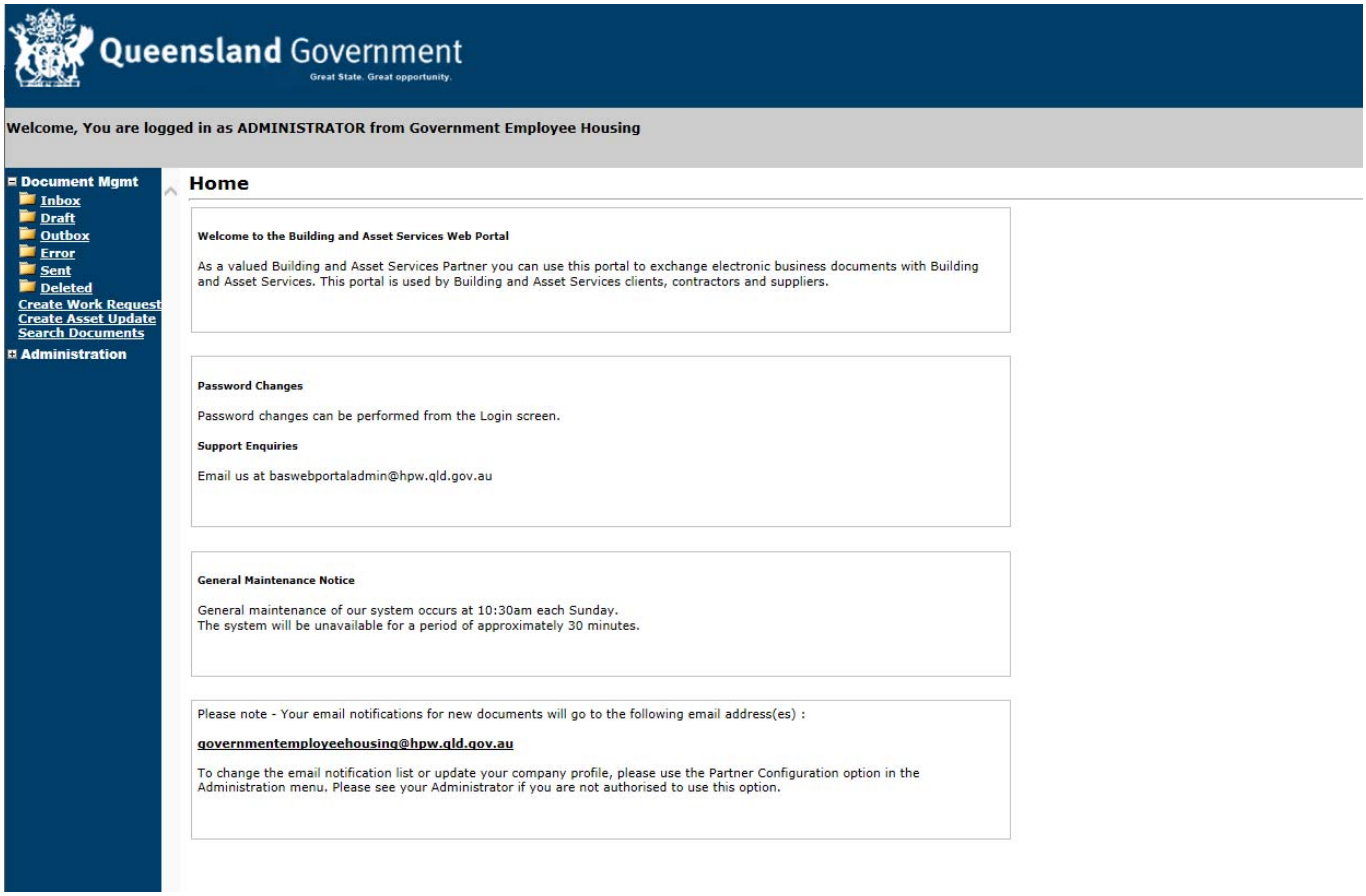
### Step 2

Log in to the Web Portal using your account details provided. Click the login button.

If you've forgotten your password, click the **Forgot Password** link and a temporary password will be emailed to you.

## Step 3

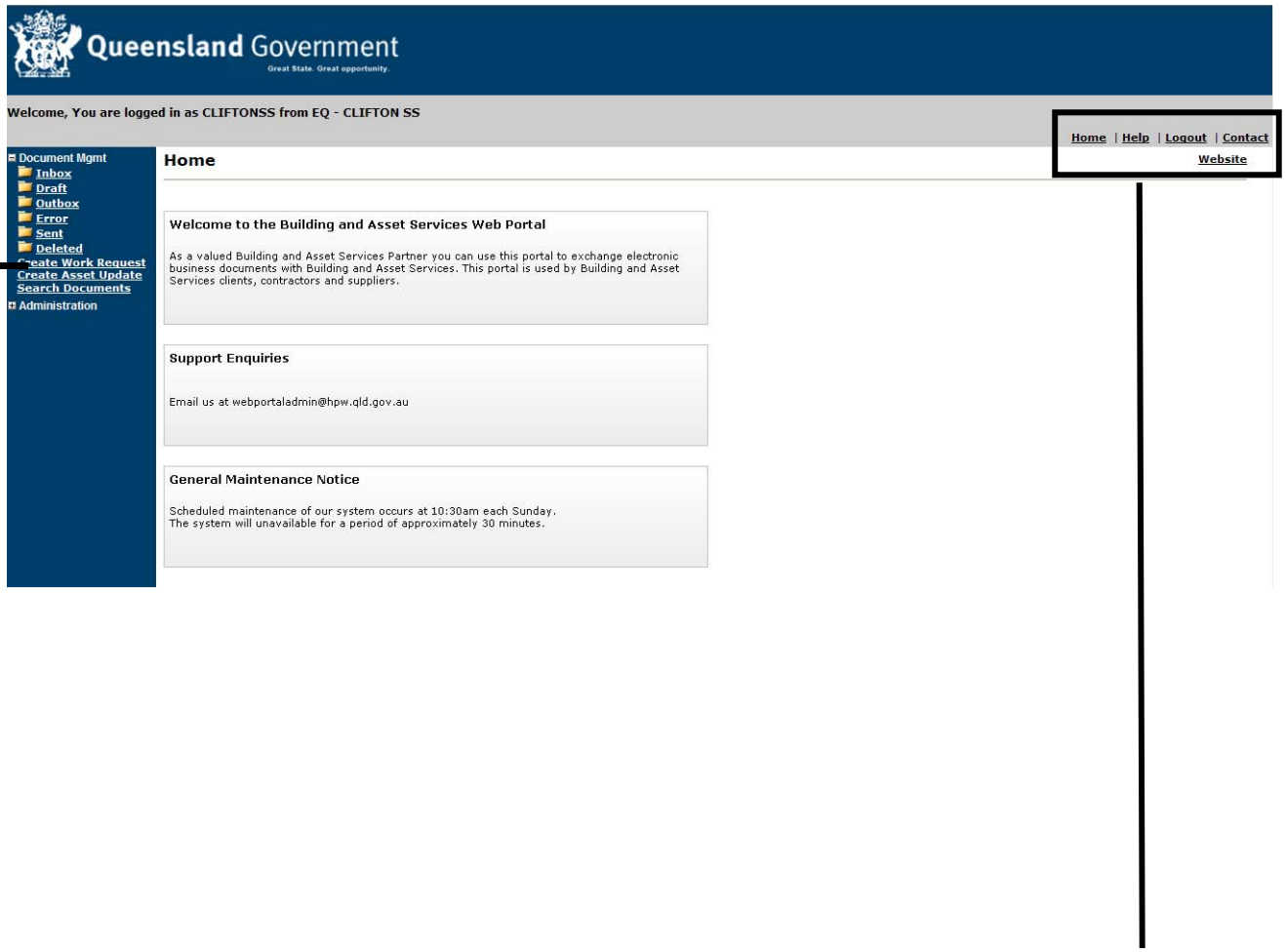
Once logged in, you will be taken to your Client Web Portal Home Page.

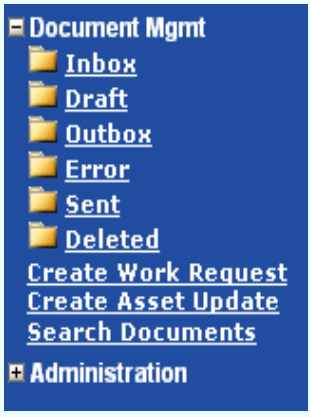


# 4. Navigating QBuild Business Online

After logging in, you will be presented with the ***QBuild Business Online*** home page. The home page contains three text boxes on the main viewing panel where you can view any news or notices from QBuild.

The home page also displays two menus, as shown below.




On the left hand side is the ***navigation menu***, which lists all the functions and folders containing the business documents and notifications.

*For more information refer to section 4.1.*

On the top right hand side is the ***activity menu***. This menu lets you select the activity.

The activities menu will differ depending on the function, or the folder you are working in.

*For more information refer to section 4.2.*

## 4.1 Navigation menu

The ***navigation menu*** is an electronic file management system where you can view and maintain your online business transactions with QBuild. The below table details the core functions of each menu item.

| | |
|---|---|
| **Inbox** | The ***Inbox*** shows a list of active documents sent to you from QBuild's system.<br><br>The following information is displayed for each document:<br>• Document Number<br>• Document Version<br>• Document Type<br>• Document Status<br>• From<br>• Date the document was received |
| **Draft** | Any document you start within ***QBUILD Business Online*** can be saved at any time and stored in the ***Draft*** folder so you can return to it later. |
| **Outbox** | Documents you send are temporarily held in the ***Outbox*** folder until they are sent electronically to QBUILD. |
| **Error** | A message will appear in the ***Error*** folder if a problem has occurred with sending a document to QBUILD. |
| **Sent** | The ***Sent*** folder stores all documents that have been successfully sent to QBUILD.<br><br>If the document you have sent is not here, check the ***Outbox*** or ***Error*** folders. |
| **Deleted** | This folder contains any ***Deleted*** documents. |
| **Archive** | You can organise this folder to store your documents. |
| **Create Work Request** | This link launches the online form to create a new ***Work Request***. |
| **Create Asset Update** | This opens the online form to create or amend asset details. |
| **Search documents** | Search for documents using this form. |
| **Administration** | This menu item will open a selection of activities to administer your ***QBuild Business Online*** account. This includes the ability to create and modify new folders to manage your documents. |

## 4.2 Activity menu

| | |
|---|---|
| **Back** | Go back to the previous screen. |
| **Back to document** | Go back to the previous document. |
| **Create copy** | Save time and copy a previously created document to form a template for a similar document (e.g. work request that is similar to the new request you want to create). |
| **Delete** | Delete the record (any item deleted will be moved to the Deleted folder). |
| **Export** | Export the information on the screen to an XML format. |
| **Help** | Open the Client Portal User Guide for reference. |
| **Home** | Return to the QBuild Business Online home page. |
| **Logout** | Log out of the application. It is important to log out correctly when you have finished using the application. |
| **Modify** | You can create new folders in which to store and manage documents. You can also modify the names of folders. |
| **New search** | Perform a new search. |
| **Print** | Print a document. |
| **Save** | Save a document to the Draft folder. |
| **Send** | Sends the document to QBuild. |
| **Submit** | Submits your request to search based on the specified criteria. |
| **Website** | Opens the HPW Website. |

## 4.3 Descriptions: other functions and activity

Within the ***QBuild Business Online*** application, you will have access to some other functions which are explained in the table below:

| | |
|---|---|
| **View full details** | To view all the details of the notifications received from QBUILD, click on the ***View Full Details*** button to open a document with all the information required. This document can be saved and/or printed. |
| **View audit details** | ***Audit details*** list the details of transactions (and who performed them) relating to a selected document. |
| **Document flow** | The ***Document Flow*** lists all of the transactions that relate to the document for tracking purposes. |
| **Document history** | The document history provides a list of the documents relating to the work request, including version numbers. |
| **Send response** | You have the ability to respond to documents/notifications received. To respond to the document, select your response status, provide QBUILD with any relevant commentary and click on the ***Send Response*** button. |

# 5. Create a work request

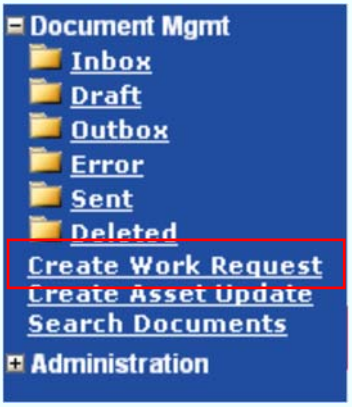
## 5.1 Purpose

***Work Requests*** can be completed and submitted to QBuild online using the ***QBuild Business Online*** application.

## 5.2 How to create a work request?

### Step 1

Click on **Create Work Request** from the navigation menu.

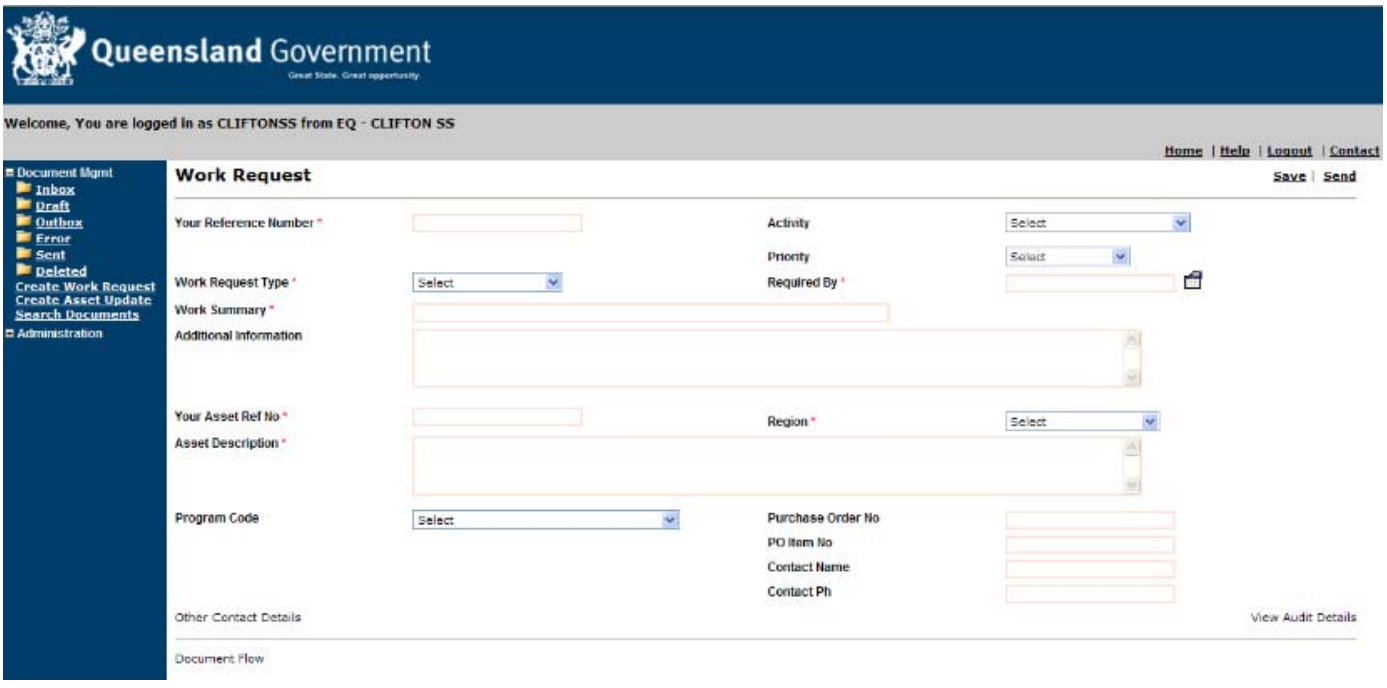



### Step 2

An online **Work Request** form will open on your main display screen.

Details on how to complete your online **Work Request** are outlined on the following page.

**Fields marked with a red asterisk are mandatory.**



## 5.3 Field descriptions: create work request

| | |
|---|---|
| **Your reference** | This is a free text field where you can enter your own reference number. |
| **Work request type** | **Select the work request type from the drop-down menu**.<br>Building maintenance – breakdown (responsive) maintenance<br>Complaint – comment for QBuild<br>Intentional damage – work resulting from vandal damage |
| **Work summary** | Provide a brief summary of the work required. *(Please note this field has a limit of 80 characters.)* |
| **Additional information** | Further details of the work required can be inputted here. The more detail you provide in your online requests, the quicker they can be processed. |
| **Your asset reference number** | Enter your asset reference number here, e.g. WIC number, SAP identifier. |
| **Asset description** | Enter a description of the asset such as the building number, street address or both *(e.g. Building 004 K Block, 124 Smith Street, Gracemere).*<br>You can also reference any important information regarding the assent that QBuild may require *(e.g. entry via Adams Street or Building used for out of hours care etc.)* |
| **Program code** | Select from the list of programs applicable to your department.<br>The ***program code*** relates to the funding source. Selecting a ***program code*** will provide clear direction to QBuild on what program your requested work will be billed from. |
| **Activity** | Select the type of work you are requesting from the drop-down list. |
| **Priority** | If the work related to responsive maintenance, then please select the response priority for the work *(e.g. 4 hrs; 24 hrs; 14 days).* |
| **Required by** | Enter a date or use the calendar to propose a date the work is required by. |
| **Region** | Select your ***QBuild region.*** You can confirm the QBuild region by referring to Appendix A at the back of this guide. |
| **Purchase order** | You may include a purchase order number here for the work to be completed. |
| **Purchase order item number** | If you have entered a purchase order number, include the item number here. |
| **Contact name** | Enter the name of the person QBuild should contact should further information be required. |
| **Contact phone** | Enter the phone number of the person QBuild should contact should further information be required. |

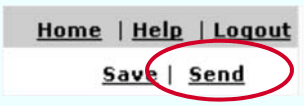
**NOTE:** Fields marked with a red asterisk are system-mandatory fields.

### 5.4 Submitting a work request

Once you have created your work request you can submit the document to QBuild online.

## Step 1

Submit the **Work Request** document to QBUILD by clicking on **Send** in your ***activity menu*** at the top right of your screen.



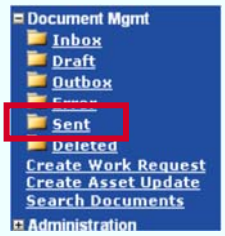

# 6 Tracking and managing work request documents

### 6.1 Navigating the sent folder

All work requests successfully sent to QBUILD will reside in your ***Sent*** folder.

## Step 1

When the **Work Request** has been successfully sent you will be able to retrieve it from your **Sent** folder.




## Step 2

A list of all sent items will appear.

Click on the document number link to open the **Work Request.**


## Step 3

Opening this document will reveal the QBuild **Work Request** number.

## 6.2 Field descriptions: sent folder

| | |
|---|---|
| ☐ | Select one or multiple documents by clicking on the check box. |
| **Document number** | The ***Document Number*** is the reference number you provided on your ***Work Request***. |
| **Document type** | This identifies what type of notification has been sent. |
| **Document date** | This indicates the date the document was created. |
| **To** | This will always say QBuild. |
| **Date and Time sent** | This will indicate when the document was sent to QBuild. |

# 7. Navigating the Inbox

All notifications in relation to a single work request will be sent from QBuild and reside in your ***Inbox***.

Click on the document number to open the work request.

**Summary View - Inbox**

| ☐ | Document Number | Version Number | Document Type | Document Date | Document Status | From | Date Received |
|---|---|---|---|---|---|---|---|
| ☐ | CADMAN03 | 1 | Work Request Status | 21-10-2009 | ACTIVE | QBuild | 21-10-2009 16:58:07 |
| ☐ | CADMAN02 | 1 | Work Request Status | 21-10-2009 | ACTIVE | QBuild | 21-10-2009 16:57:35 |
| ☐ | CADMAN01 | 1 | Work Request Status | 21-10-2009 | ACTIVE | QBuild | 21-10-2009 16:57:12 |
| ☐ | CADMAN | 1 | Work Request Status | 21-10-2009 | ACTIVE | QBuild | 21-10-2009 15:59:46 |
| ☐ | JEFF200 | 1 | Work Request Status | 21-10-2009 | ACTIVE | QBuild | 21-10-2009 15:27:14 |
| ☐ | JEFF021 | 5 | Work Request Status | 21-10-2009 | ACTIVE | QBuild | 21-10-2009 11:25:52 |

## 7.1 Field descriptions: Inbox

| | |
|---|---|
| ☐ | Select one or multiple documents by clicking on the check box. |
| **Document number** | The document is your reference number as entered on the original work request. If it is a QBUILD generated document this document number will be the work request number generated by the QBUILD system. |
| **Version number** | Each notification sent to you will be given a version number so you can see which notification is the most recent. |
| **Document type** | This identifies what type of notification has been sent. |
| **Document date** | This indicates the date the document was created. |
| **Document status** | Document status will be one of the following:<br>⚠ active<br>⚠ inactive<br>⚠ closed |
| **From** | Identifies the sender of the document. |
| **Date recevied** | Date the document was received in your account. |

# 8 Accessing notifications

## 8.1 Purpose

Notifications are generated by QBuild and provide information regarding work that is scheduled to occur. You will have the ability to respond to the information provided in the notification, save and or print the documents for your records, and follow the history of the document and any changes made to the information.

The different types of notifications you may receive are:

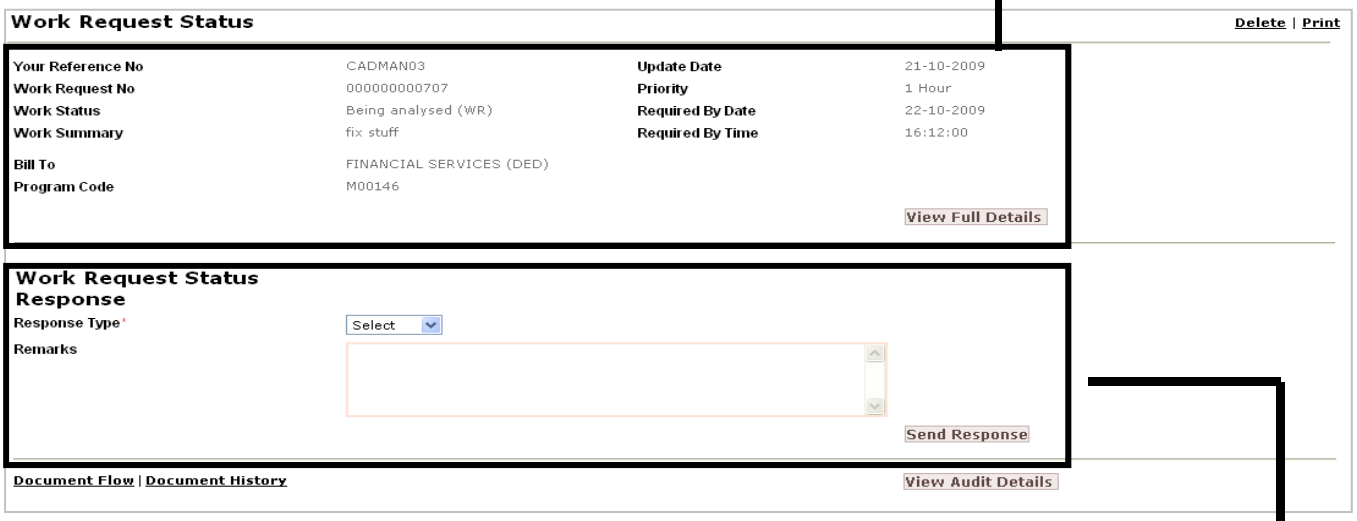
- Work Request Status
- QBuild Customer Job Statement

**The types of notifications you receive will be dependent on your department's agreement with QBuild.**

## 8.2 Navigating notifications


**All notifications have a header section containing high level detail of the notification, a *View Full Details* link to access the document and a response section.**

The top section provides you the high level detail of the notification. To view the full details of the notification click on the **View Full Details** link for the document.




The bottom section allows you to respond to the notification. When you are ready, click on the **Send Response** button and your response type and remarks will be forwarded to QBUILD for action.

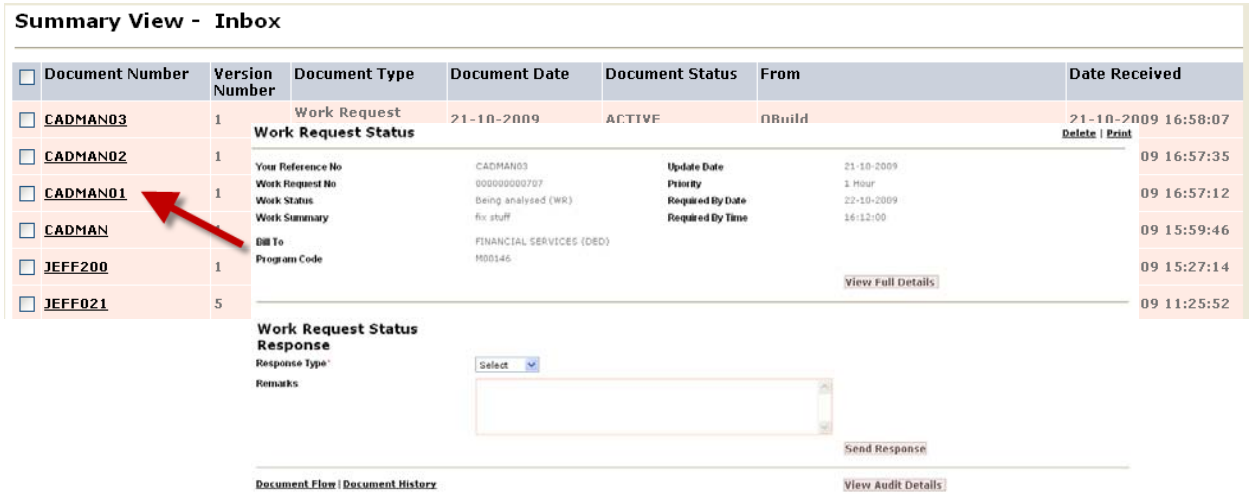
## 8.3 Work request status notification

All ***Work Request Status*** notifications will reside in your ***Inbox***.

They will be identified as a ***Work Request Status*** document type.


## Step 1

Click on the document number to open the work request status notification.




## Step 2

To view the full details of the notification click the **View Full Details** link.

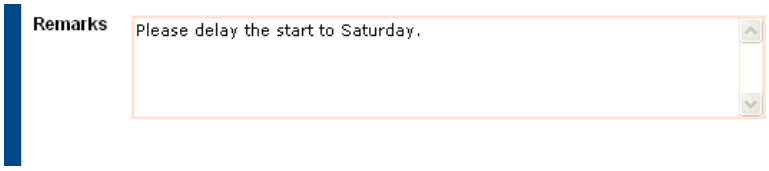

This will display a document with all the details of the work request for your review.

## Step 3

To respond to the notification, select your response from the **Response Type** drop down box.

## Step 4

If you would like to reject or delay the work, please, provide an explanation in the **Remarks** box.




## Step 5

To send the response click **Send Response**.

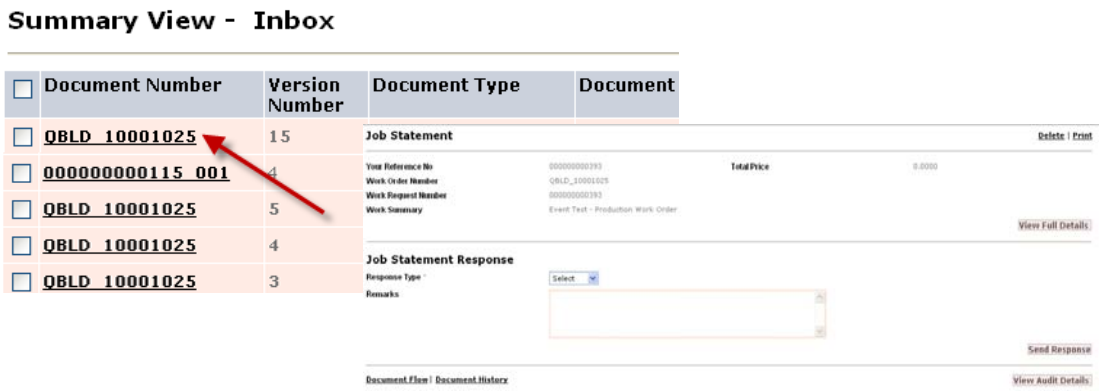

Anything you send on to QBuild will display in your **Sent** folder.

### 8.4 QBuild customer job statement

All ***QBuild Customer Job Statement*** notifications will reside in your ***Inbox***.
They will be identified as a Job Statement document type.


## Step 1

Click on the document number to open the **QBuild Customer Job Statement** notification.




## Step 2

To view the **QBuild Customer Job Statement** click the **View Full Details** link.

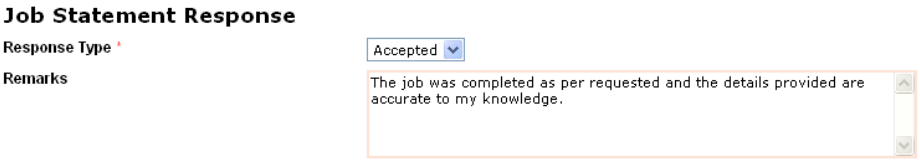

This will display the **QBuild Customer Job Statement** for your review.

## Step 3

To respond to the notification, select your response from the **Response Type** drop down box.


## Step 4

If you wish to reject the job statement, please provide an explanation so QBUILD can respond to your concerns quickly.




## Step 5

To send the response click **Send Response**.

Anything you send on to QBuild will display in your **Sent** folder.

# 9. Creating an asset update

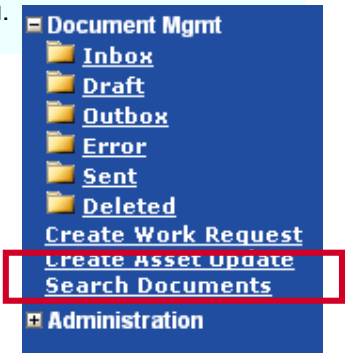
## 9.1 Purpose

To ensure QBuild's record of your assets remains current, use the ***Create Asset Update*** function to advise of new assets or updates to existing assets.

## 9.2 Create asset update

### Step 1

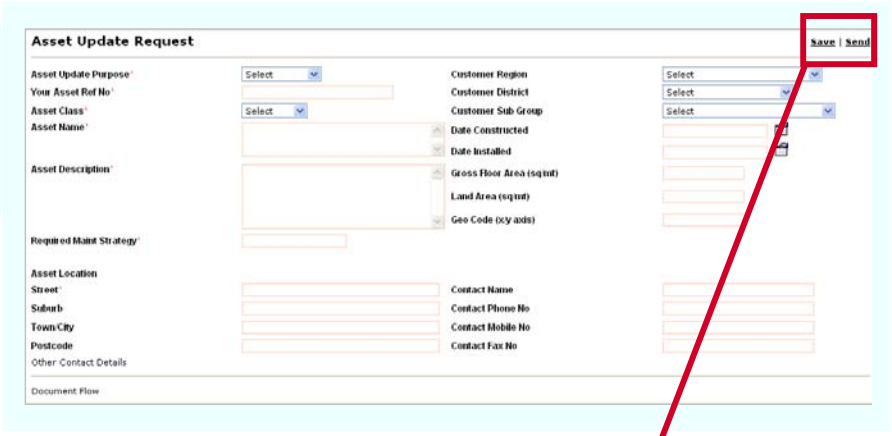
Select **Create Asset Update** from the **QBuild Business Online** navigation menu.




### Step 2

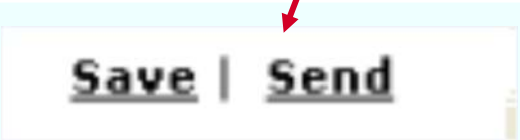
Create an asset update by completing the fields as described below.

**Fields marked with a red asterisk are mandatory.**




### Step 3

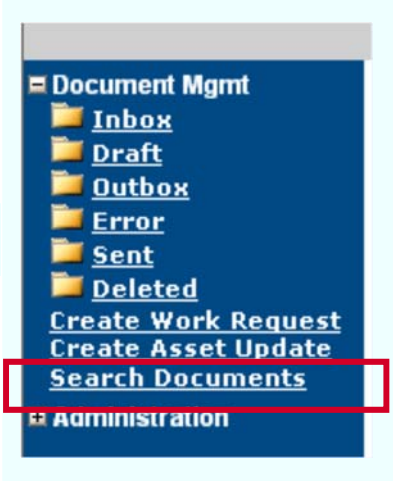
When you have completed your work request, select **Send** from the menu in the top right hand corner.



## 9.3 Field descriptions: create asset update

| | |
|---|---|
| **Asset update purpose** | Select from the drop down list. Is the asset update because the asset is new or because you are modifying the details on an existing asset? |
| **Your asset reference number** | Enter your asset reference number here. |
| **Asset class** | Select from the drop down list the type of asset. |
| **Asset name** | Enter the name of the asset here. |
| **Asset description** | Provide a brief description of the asset here. |
| **Required maintenance strategy** | Enter if a maintenance strategy is required. |
| **Street** | Enter the street address for the asset. |
| **Suburb** | Enter the suburb in which the asset is located. |
| **Town/City** | Enter the town/city in which the asset is located. |
| **Postcode** | Enter the postcode for where the asset is located. |
| **Customer region** | Select the region that is applicable to you. |
| **Customer district** | Select the district, if relevant, that is applicable to you. |
| **Customer sub-group** | Select the sub-group, if relevant, that is applicable to you. |
| **Date constructed** | If relevant, note the construction date. |
| **Date installed** | If relevant, note the installation date. |
| **Gross floor area (sq/m)** | If relevant, note the gross floor area, in square metres. |
| **Land area (sq/m)** | If relevant, note the land area, in square metres. |
| **Geo code (x/y axis)** | Note the geo code (available from most mapping softwares) |
| **Contact name** | Enter the name of the person QBuild should contact should further information be required. |
| **Contact phone** | Enter the phone number of the person QBuild should contact should further information be required. |
| **Contact mobile** | Enter the mobile phone number of the person QBuild should contact should further information be required. |
| **Contact fax** | Enter the fax number of the person QBuild should contact should further information be required. |
| **Other contact details** | Enter in any other relevant contact details QBuild should further information be required. |

# 10. Searching for documents



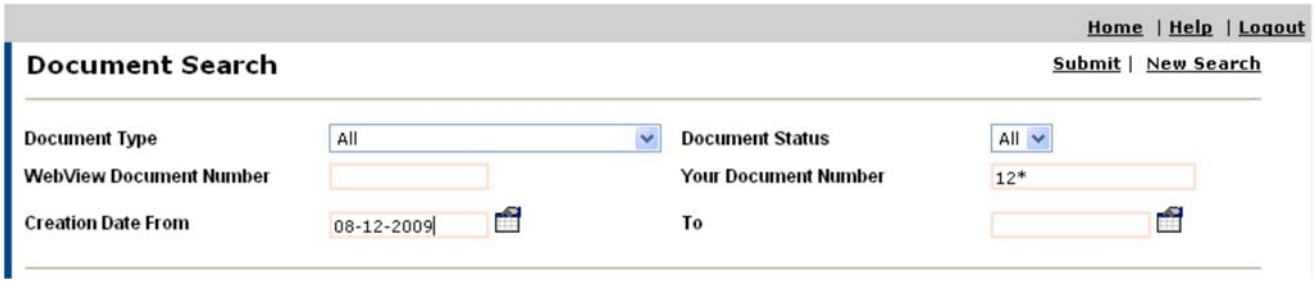

## Step 1

Select **Search Documents** from the navigation menu

## Step 2

Choose relevant criteria to assist your document search. Selectable parameters are:

- Document Type
- Document Status
- WebView Document Number (this is the number generated by QBUILD Business Online for a document)
- Your Document Number
- Creation date from and to.

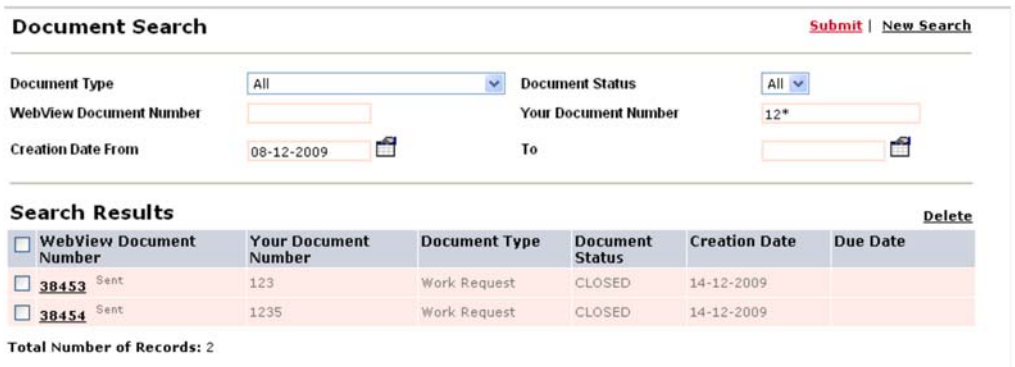




**You can use an asterisk 'wild card' in the document number fields, e.g. 12* will find all document numbers starting with 12 or *1234* will find all document numbers that contain 1234**

## Step 3

Matching search results are returned. Select the document you wish to view by clicking its document number.

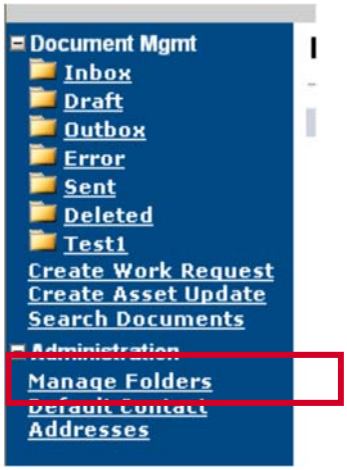


# 11. Managing folders

You can create and manage folders in which to store documents.

## Step 1

Select **Manage Folders** from the administration section of the navigation menu.



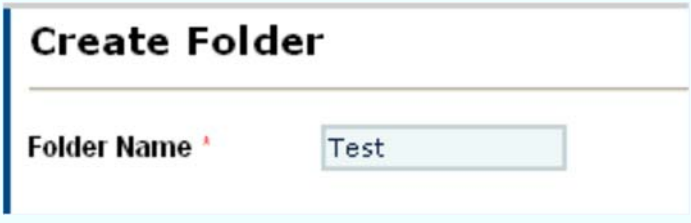

## Step 2

Click **Create** to create a new folder.


## Step 3

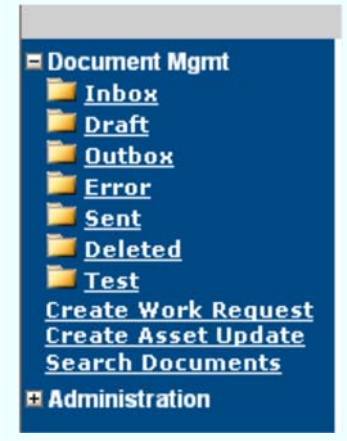
Choose a name for the folder.

Click **Save**.



## Step 4

A new folder has been created in the navigation list.





**Once you have created a folder, you can modify the name of a folder - access create folder and use the modify function.**

# 12. Appendix A: QBuild Regions