Bellevue Operations Management System User Manual

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1 MODULES

1. **Home –** Navigates the user to the Metrics page

    (Accessible by: Supervisors, Managers, Department Heads & Management)

2. **Tasks –** Navigates the user to the Tasks page

    (Accessible by: Supervisors, Managers, Department Heads & Management)

3. **Projects –** Navigates to the Projects page

    (Accessible by: Supervisors, Managers, Department Heads)

4. **Department –** Navigates to the Department Management page

    (Accessible by: Managers, Department Heads)

5. **Notifications –** Navigates to the Notifications page

    (Accessible by: All Positions)

6. **Reports –** Navigates to the Reports page

    (Accessible by: Managers, Department Heads & Management)

7. **Profile –** Navigates to the Profile page

   *(Accessible by: Managers, Department Heads & Management)*

2 HOME PAGE

(Accessible by: *Supervisors, Managers, Department Heads & Management*)

2.1 Issues Tab
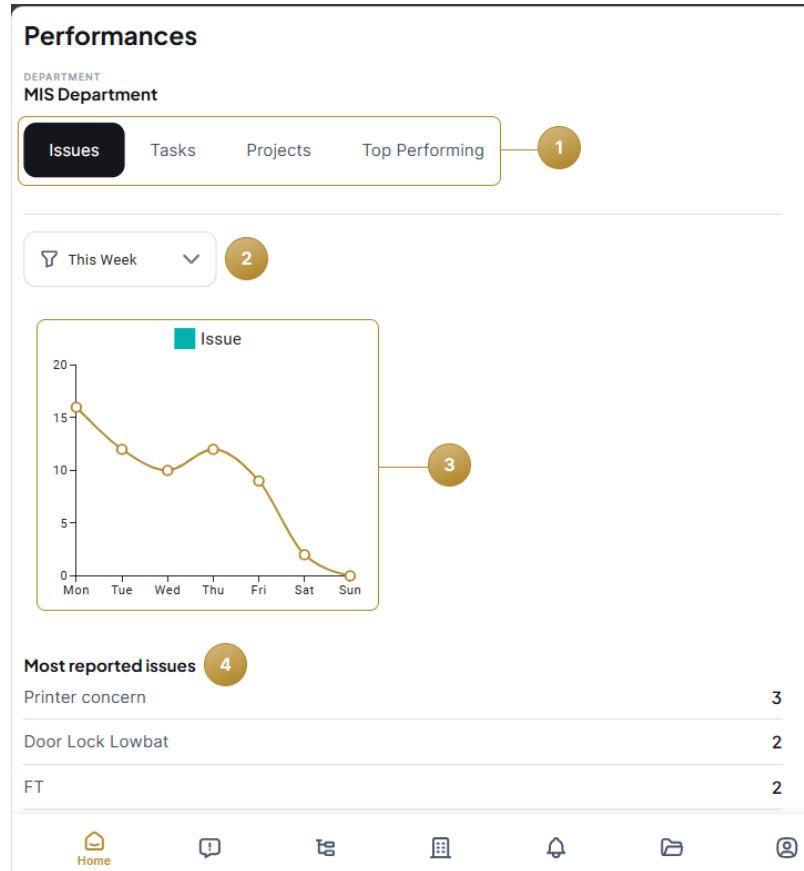
1. **Menu Tab –** Use the navigation options to change the data displayed below.
2. **Date Filter –** Filter the reported date of issues. Available options are: Daily, This Week, Month, and Year.
3. **Line Chart –** Displays a visual representation of reported issues based on the selected date filter. Click or tap on the dots to see the number of issues for a specific day.
4. **Most Reported Issues –** Displays the top 50 issues that occur most frequently based on the selected date filter, listed from highest to lowest occurrence.

2.2 Tasks Tab
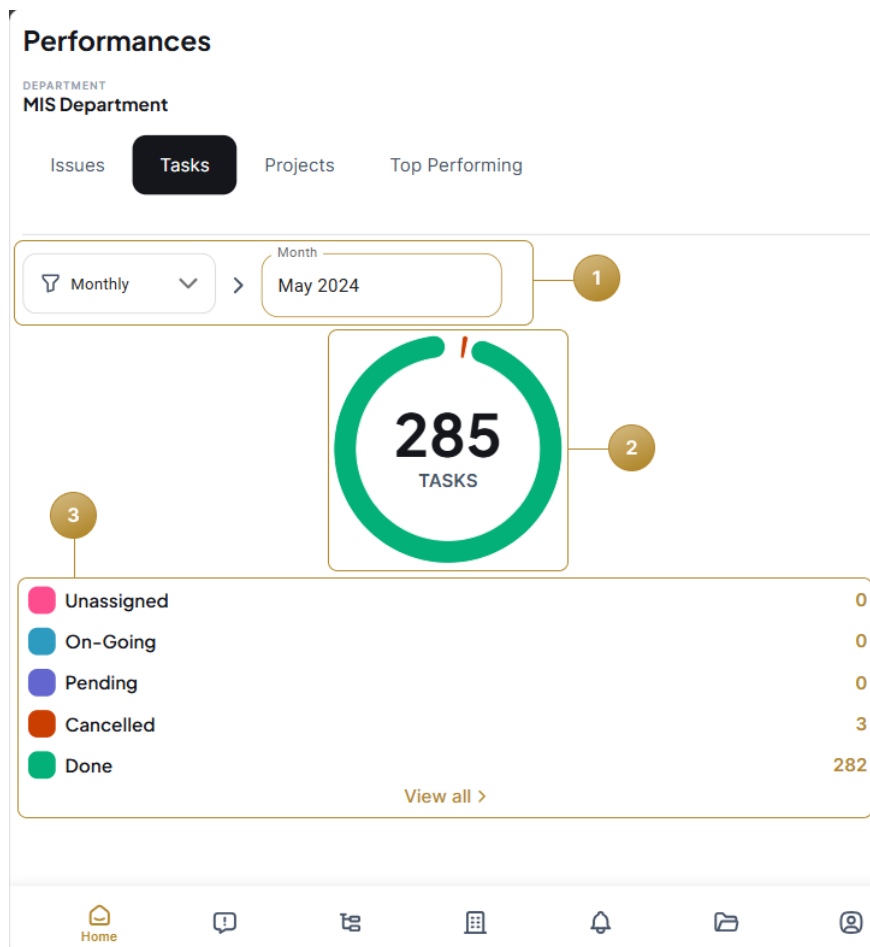
1. **Date Filters –** Filter the tasks' status by date. Available options are: Daily, This Week, Month, and Year.
2. **Doughnut Chart –** Displays the total tasks based on the selected date filter and shows a color indicator for the status of tasks. Click or tap a color to see the exact number of tasks.
3. **Legends & Total counts –** Displays the chart legend and shows the total count of tasks for each status. Click 'View all' to navigate to Tasks page.

2.3 Projects Tab
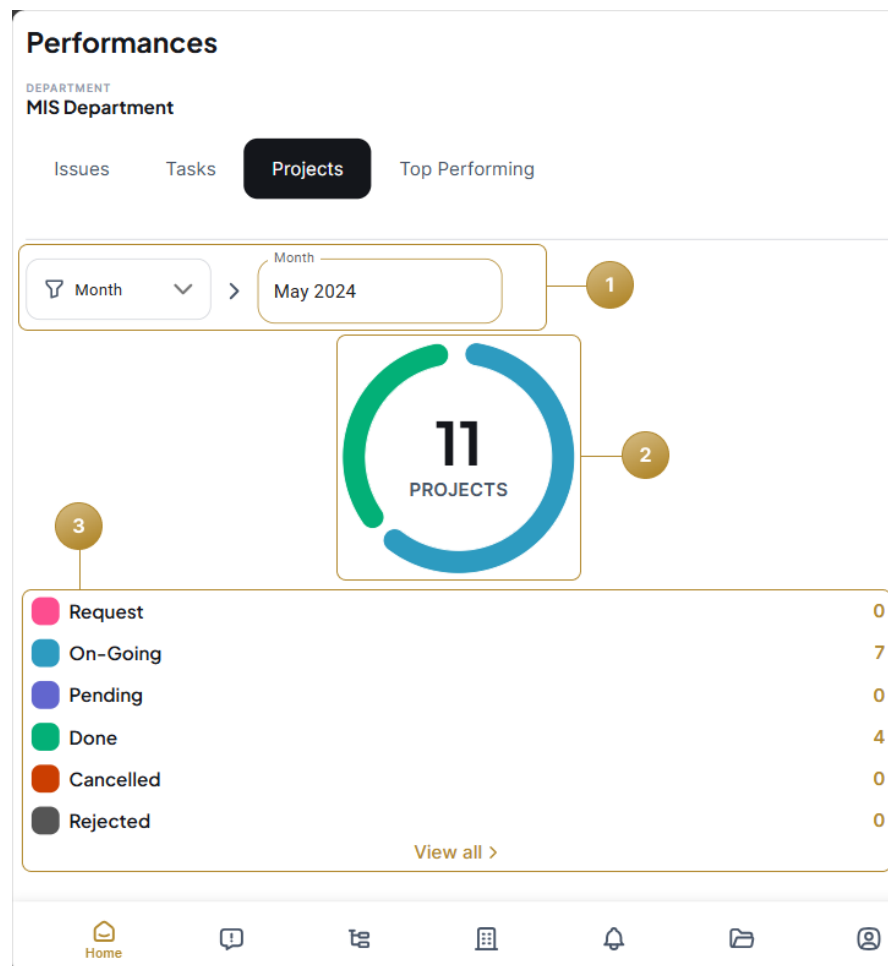
1. **Date Filters –** Filter the projects' status by date. Available options are: Daily, This Week, Month, and Year.
2. **Doughnut Chart –** Displays the total projects based on the selected date filter and shows a color indicator for the status of projects. Click or tap a color to see the exact number of projects.
3. **Legends & Total counts –** Displays the chart legend and shows the total count of projects for each status. Click 'View all' to navigate to Projects page.

2.4 Top Performing Tab
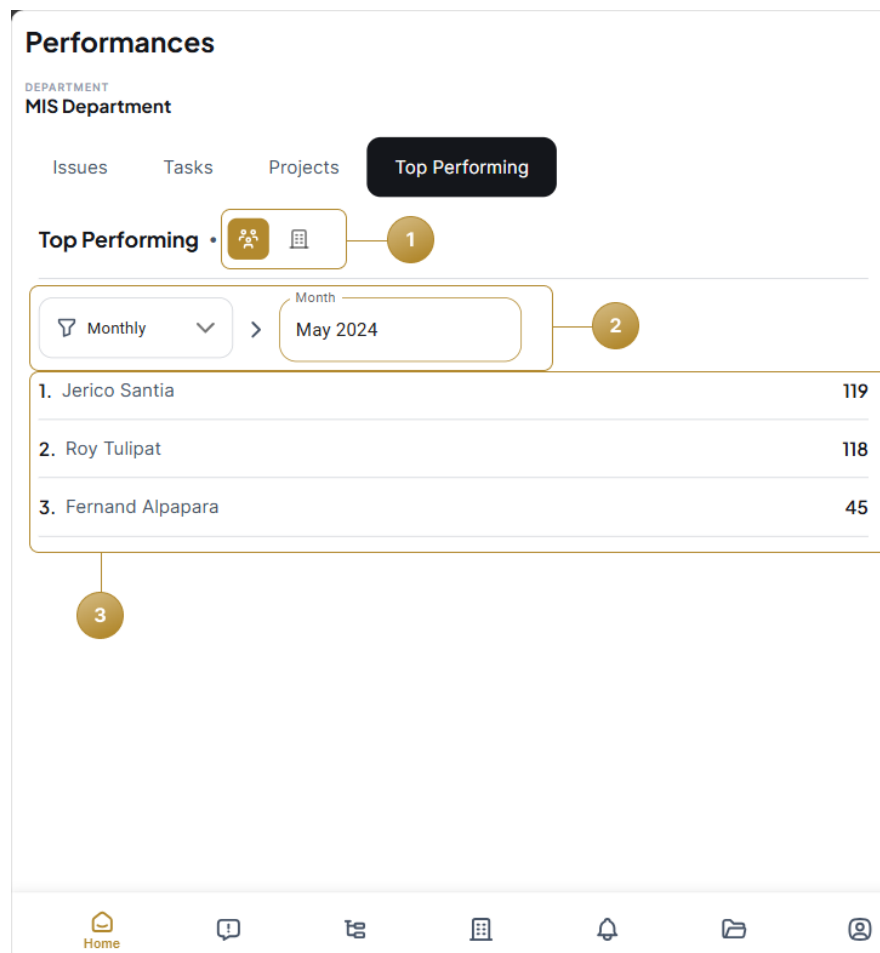
1. **Toggle Switch –** Use the icon buttons 'Employees' and 'Departments' to switch between displaying top employees or top departments.
2. **Date Filters –** Filter the top performers based on the date of their total accomplishments. Available options are: Daily, This Week, Month, Year, and Custom.
3. **List of Employees/Departments –** Displays the list of names of top performing employees/departments based on the date filter.

3 TASKS PAGE

(Accessible by: *Supervisors, Managers, Department Heads & Management)*
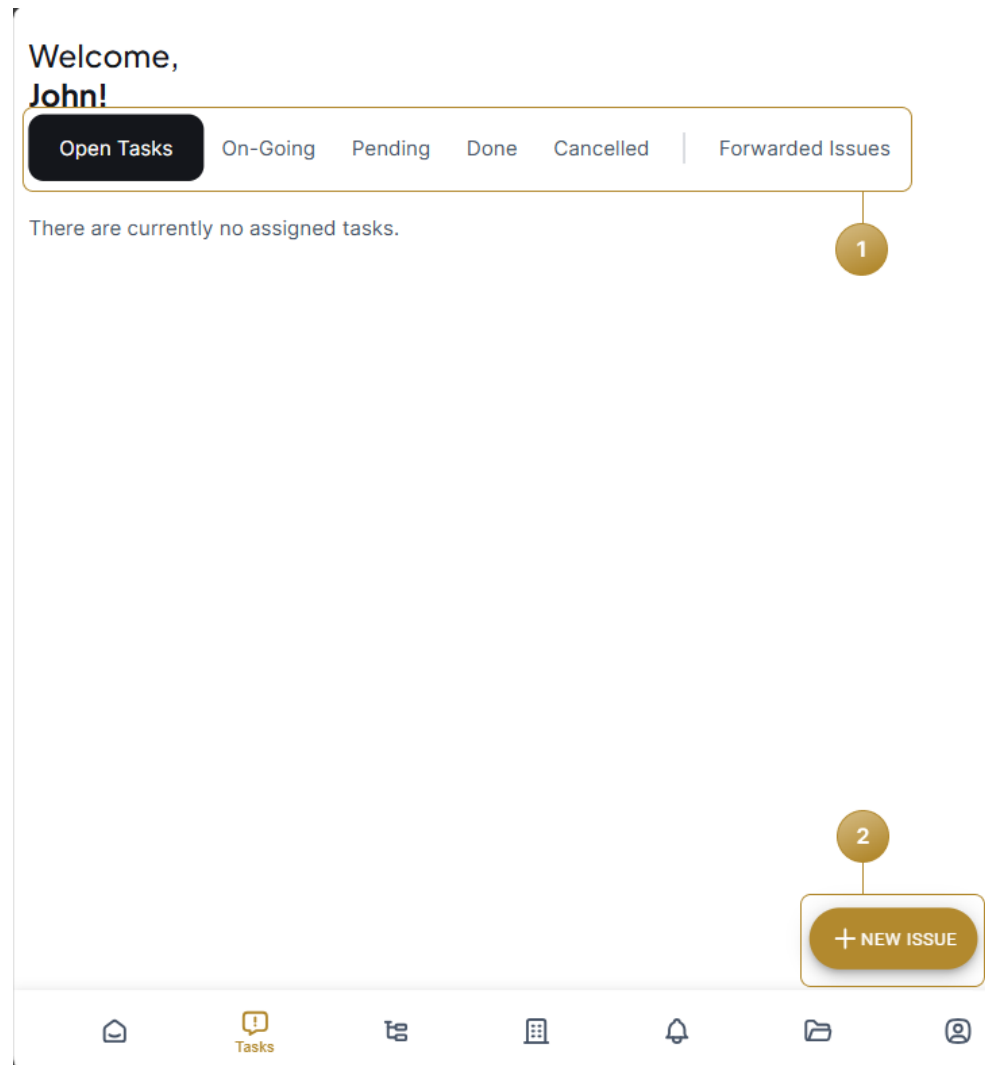
1. **Menu Tab**

    a. **Open Tasks –** Shows the unassigned tasks reported to your department.

    b. **Ongoing –** Shows your ongoing and overdue tasks.

    c. **Pending –** Shows your pending tasks, where deadline is beyond the current date.

    d. **Done –** Show the tasks you have accomplished (Can be date filtered).

       e. **Cancelled –** Shows the tasks you have cancelled (Can be date filtered).

       f. **Forwarded Issues –** Shows the issues you have reported to other departments (Can be date filtered).

2. **New Issue Button –** Navigates you to Issue Reporting page.

3.1 Creating Issue

1. **Area –** Enter the area/location where the issue found.
2. **Concerned Department –** Select the department that is responsible for addressing or resolving the issue from the dropdown
3. **Issue –** Enter the issue or select from the suggestive issues.
4. **Details –** Provide additional information or context regarding the issue. Include any relevant details that can assist in understanding or resolving the problem.
5. **Priority –** Select priority level based on the severity of the issue.

6. **Add Image –** Add a snapshot of the issue. Only images are accepted and is optional.

7. **Submit Button –** When all required fields are filled. Click this button to finally forward the issue to the concerned department.
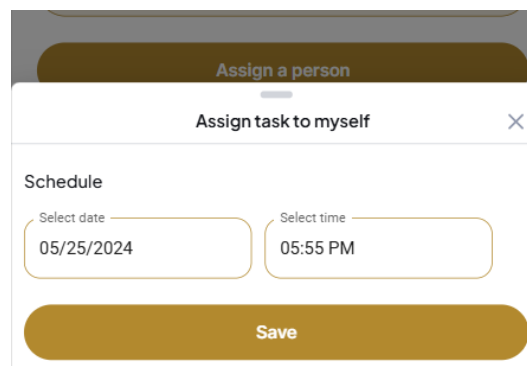
3.2 Assigning a Task

Select an issue you want to assign from the 'Open Tasks' menu.

1. **Assign to myse**lf – Assign the task to yourself.

Enter the date by which the task should be accomplished and click Save.

2. **Assign a Person (Only accessible by Supervisors and above) –** Assign a person within your department who will be responsible for accomplishing the task.

Select assignee from the dropdown and set a schedule in which the task should be accomplished and click Assign.
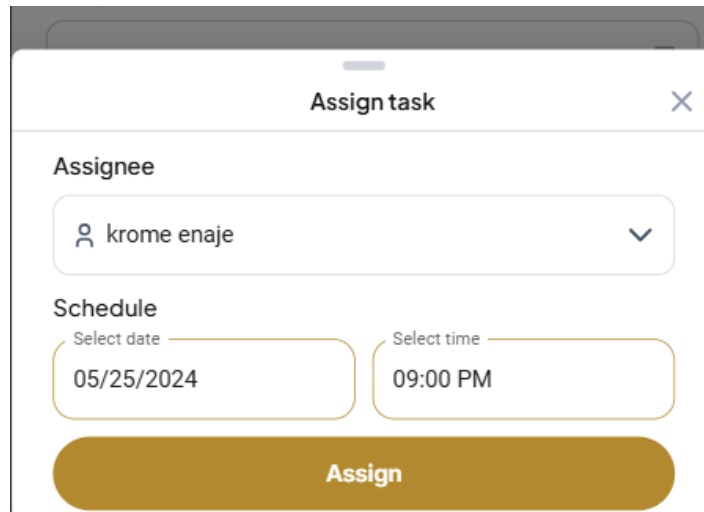
3.3 Re-assigning a Task

Re-assigning task is applicable when the selected task has not yet accomplished, even the previous assignee has accepted the task.

1. Select a task you want to re-assign and click 'Change assignee'.

2. Select new assignee and set a new schedule date.
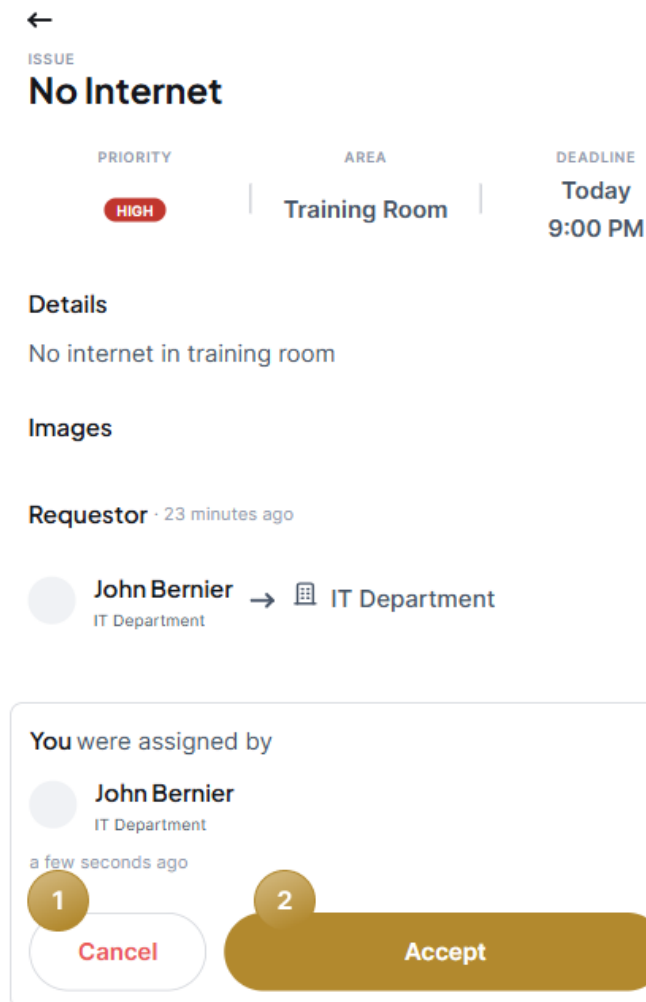
3.4 Accept or Cancel a Task

1. **Cancel –** Cancel a task you have assigned to.

Enter a valid reason for cancelling the task.

2. **Accept –** Accept the responsibility for taking action on this task.

3.5 Accomplish/Pending/Cancel Task

1. **Accomplish -** Mark the task as completed.
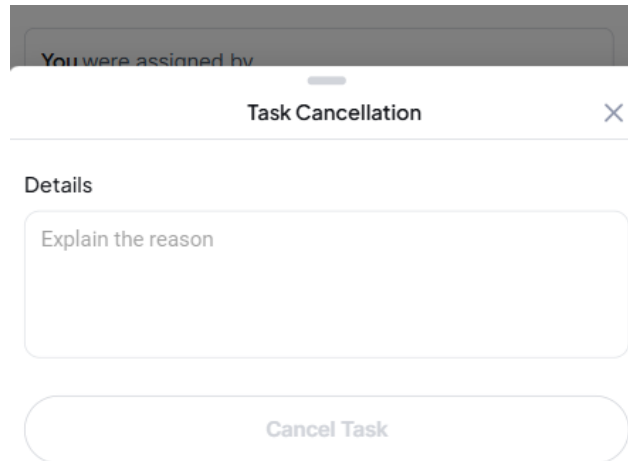
Enter what actions have been taken, remarks and optionally insert a snapshot as a proof.

2. **Cancel -** Terminate the task.
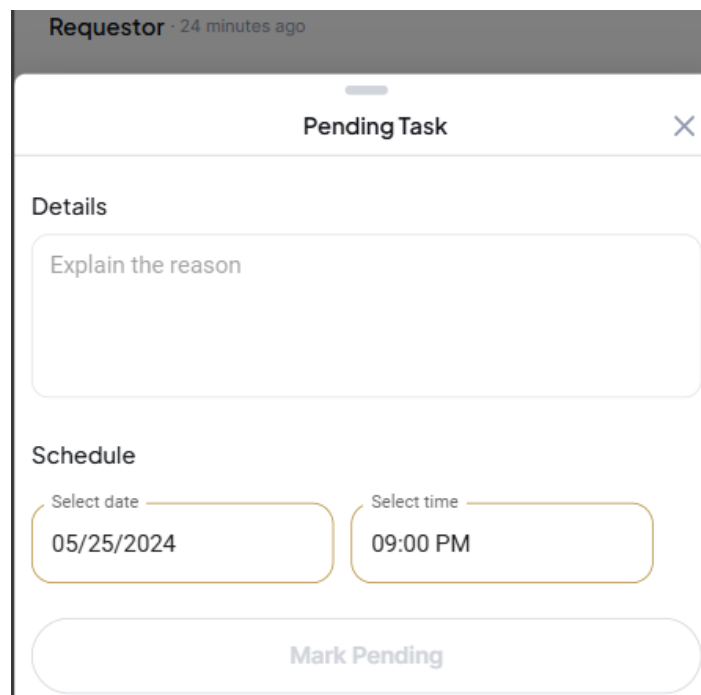

Enter a valid reason for cancelling task and click 'Cancel Task.

3. **Pending -** Mark the task as pending for another date & time.

Enter the reason for pending and set a new schedule.

4 PROJECTS PAGE

(Accessible by: *Supervisors, Managers & Department Heads*)
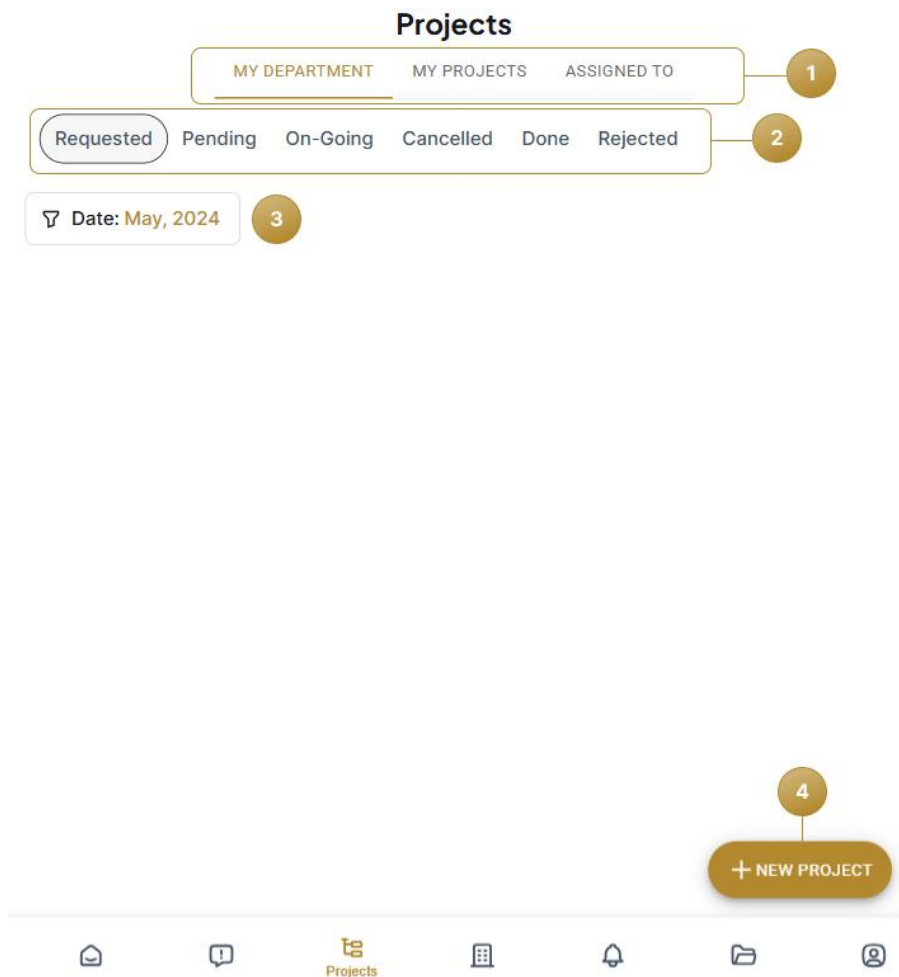
1. **Menu Tab**

    a. **My Department (Only accessible by Managers and above) –** Displays all projects within your department.

    b. **My Projects –** Displays all the projects where you are assigned as the in-charge personnel.

    c. **Assigned To –** Displays all the projects you have created and assigned to other person within your department.

2. **Status Menu Tab**

    a. **Requested –** Shows all tasks that are awaiting approval.

      b. Pending – Shows all pending projects, where start date is beyond the current date within your department.

      c. On-Going – Shows all ongoing and overdue projects within your department.

      d. Cancelled – Shows all cancelled tasks within your department.

      e. Done – Shows all the accomplished projects.

      f. Rejected – Shows all the projects that haven't passed through.

3. **Date Filters -** Filter the projects based on the date of their creation or completion. Available options are: Daily, This Week, Month, Year, and Custom.

4. **New Project Button –** Navigates you to the Project Creation page.

4.1 Creating Project

Managers and Department Heads can create both Minor and Major projects, while Supervisors can only create Minor projects.

1. **Project Type –** Select the project's type: Minor or Major.
2. **Project Title –** Enter the title or name of the project.
3. **Project Location –** Enter the location or area of the project.
4. **Details –** Provide all information of what the project about. Include all important details such as people involved, project price, etc.
5. **Personnel In-Charge –** Select from the search bar the responsible personnel for managing of the task.

6. **Schedule –** Select the start date & time of the project.

7. **Deadline –** Select the deadline or end date & time of the project.

8. **Create Project Button –** When all required fields are filled. Click this button to submit the project to the department. After submitting, await approval.

4.2 Approving/Rejecting Project

Managers and Department Heads can approve and reject both Minor and Major projects while Supervisors can only approve and reject Minor projects.

1. **Approve –** Approve the project proposed.
2. **Reject –** Reject the project proposed.

Enter a valid reason for rejecting the project and click 'Reject Project' button.
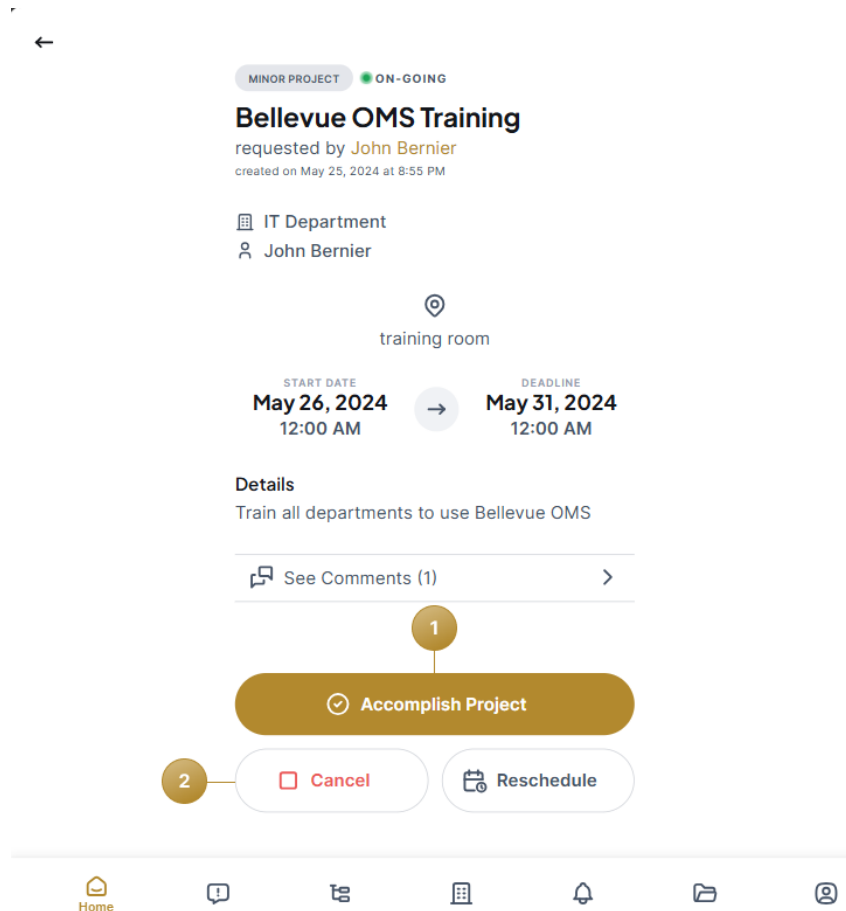
3. **Reschedule –** Pend & Set a new start date & end date of the proposed project.
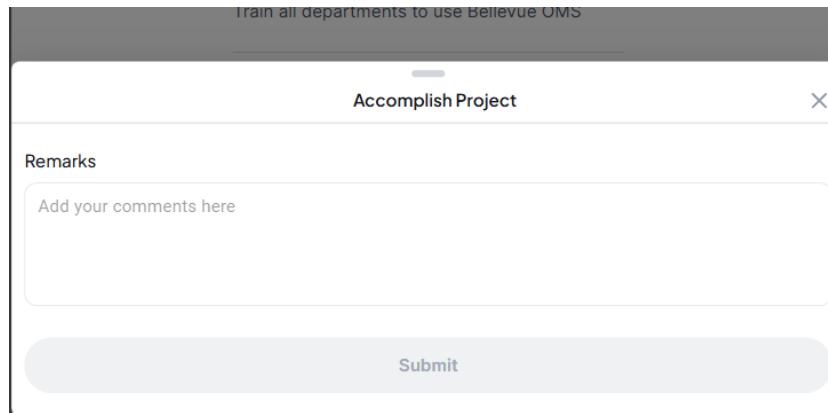
Set the new start date and end date of the project and click 'Set Schedule'

4.3 Accomplish/Cancel Project

1. **Accomplish Project –** Accomplish and mark the project as completed.

Enter the remarks of the accomplished project and click 'Submit'.

2. **Cancel Project –** Cancel the approved/running project.

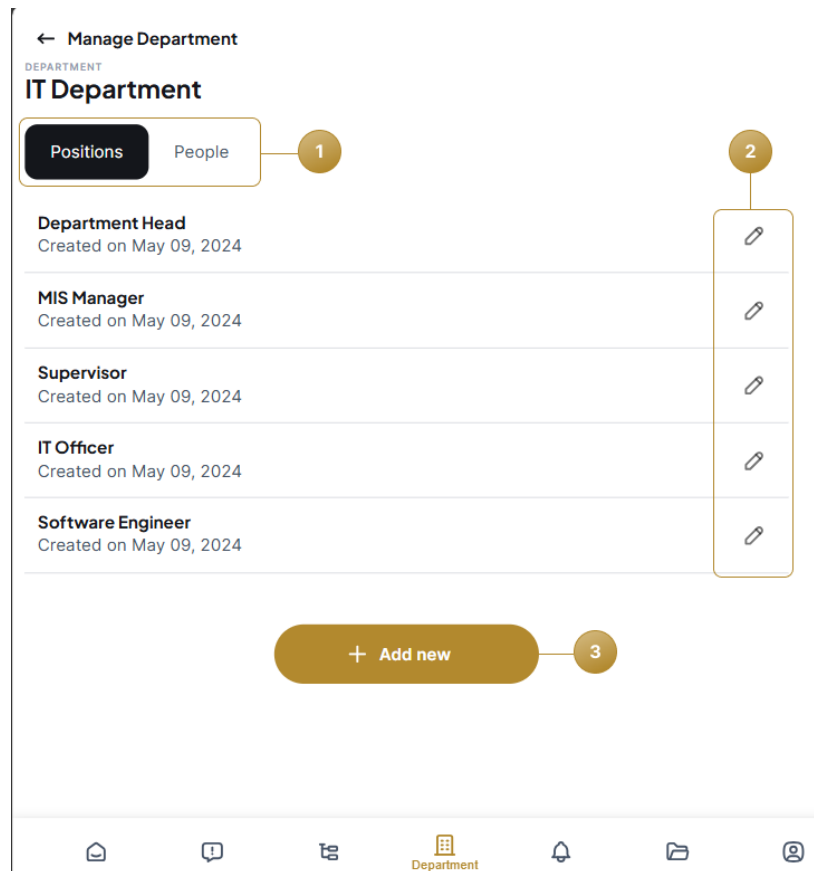Enter a valid reason for cancelling project and click 'Cancel Project'.

5 DEPARTMENTS PAGE

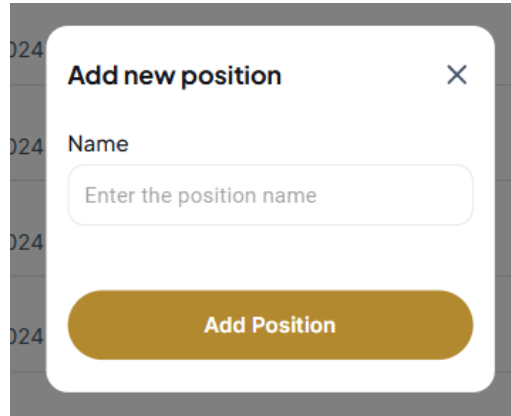(Accessible by: *Managers & Department Heads*)

1. **Menu Tab**
    a. **Positions –** Show all positions within the department.
    b. **People –** Show all people/employees within the department.
2. **Edit Button –** Edit and update the name of the selected item.
3. **Add New Button –** Insert new position title to the department.

5.1 Adding new Position
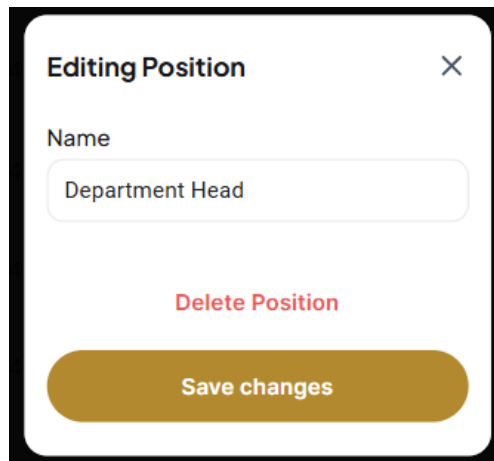
Enter new position name and click 'Add Position'.

5.2 Editing Position
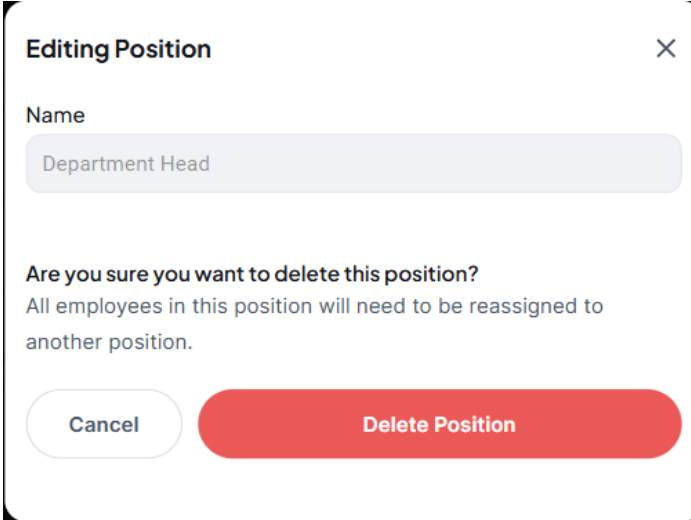
Update the position name and click 'Save Changes'.

5.3 Deleting Position

Editing Position   ✕

Name

Department Head

Are you sure you want to delete this position?
All employees in this position will need to be reassigned to
another position.

Cancel   **Delete Position**

Confirm the name of the department you are deleting and click 'Delete Position' button.

5.4 Adding new person/employee

1. **Account Details –** Provide the information of the person being added and select assign them a position from the dropdown menu.
2. **Login Details –** Enter a new username and password for the person being added. These will be the credentials they need to use when logging into the system.

5.5 Managing Employee Account Details

1. **Change Password –** Tick the checkbox to display the text field for changing the password. Enter the new password and click 'Save Changes'.
2. **Archive User –** Deactivate the employee's account to prevent them from logging into the system. This will not remove any data recorded by the employee.

6 REPORTS PAGE

(Accessible by: *Managers & Department Heads)*

Reports

| TASKS | PROJECTS | ① | ② |

| Issue ⌄ | Search | 🔍 ✕ |

③ ▽ Date Created: May, 2024   ④ ▽ Status

Task	Area/Room ID	Assigned to	Schedule	Completion Date	Status
wheel chair ramp ⬈ May 26, 2024	Hanakazu	Engineering Allan Patricio	May 26, 2024 03:02 AM	May 26, 2024 03:03 AM	ACCOMPLISHED
flush door ⬈ May 26, 2024	Chemical room b1	Engineering Allan Patricio	May 26, 2024 02:54 AM	May 26, 2024 02:55 AM	ACCOMPLISHED
Telephone Concern ⬈ May 25, 2024	Front Office	MIS Department Jerico Santia	May 25, 2024 09:45 PM	May 25, 2024 09:46 PM	ACCOMPLISHED
POS Concern ⬈ May 25, 2024	Qsina	MIS Department Jerico Santia	May 25, 2024 09:44 PM	May 25, 2024 09:45 PM	ACCOMPLISHED
Desktop ⬈ May 25, 2024	Finance	MIS Department Jerico Santia	May 25, 2024 09:45 PM	May 25, 2024 09:46 PM	ACCOMPLISHED
Wifi Concern ⬈ May 25, 2024	Room 1414	MIS Department Jerico Santia	May 25, 2024 09:45 PM	May 25, 2024 09:46 PM	ACCOMPLISHED
TV Concern ⬈ May 25, 2024	Room 1128	MIS Department Jerico Santia	May 25, 2024 09:46 PM	May 25, 2024 09:47 PM	ACCOMPLISHED
TV Concern ⬈ May 25, 2024	Room 1432	MIS Department Jerico Santia	May 25, 2024 09:46 PM	May 25, 2024 09:47 PM	ACCOMPLISHED
Wifi Concern ⬈ May 25, 2024	Room 1010	MIS Department Jerico Santia	May 25, 2024 09:46 PM	May 25, 2024 09:47 PM	ACCOMPLISHED
Laptop concern ⬈ May 25, 2024	Front Office	MIS Department Jerico Santia	May 25, 2024 09:47 PM	May 25, 2024 09:48 PM	ACCOMPLISHED

Rows per page: 10 ⌄   1–10 of 503   ‹ ›

⑤ 🖨 Print   ⑥ ⬇ Export Data

🏠 Home 💬 Tasks 🗂 Projects 🏢 Department 🔔 Notifications 📁 Reports 👤 Profile
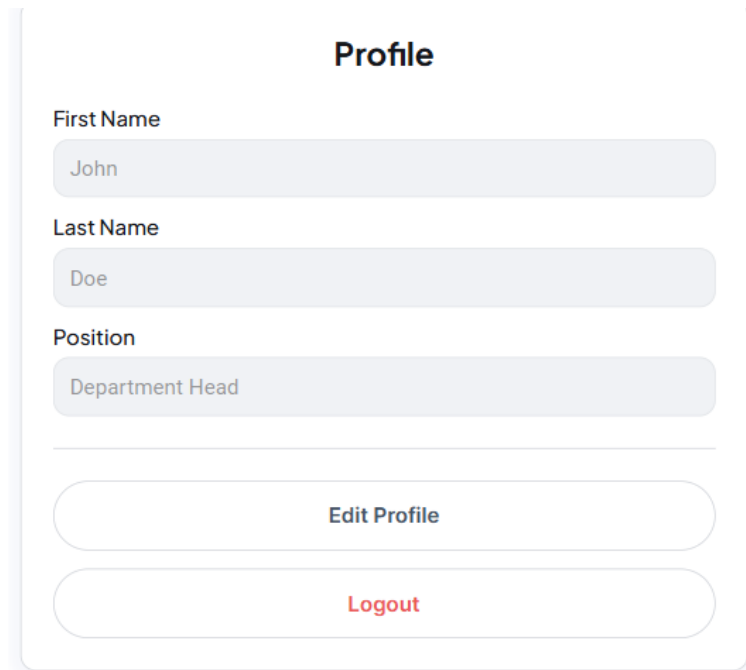
1. **Menu Tab**

    a. **Tasks Reports –** Show all tasks recorded to the system within your department.

    b. **Projects Reports –** Show all projects recorded to the system within your department.

2. **Search Bar –** Enter keywords to filter the data in the table below. Click the dropdown to select additional filters.

3. **Date Filters -** Filter the data in the table based on the date of their creation. Available options are: Daily, This Week, Month, Year, and Custom.

4. **Status Filter –** Filter the projects displayed in the table based on their status.

5. **Print Button –** Print the data displayed on the current page of the table.

6. **Export Data Button –** Export all data based on the applied filters and automatically download a CSV file.
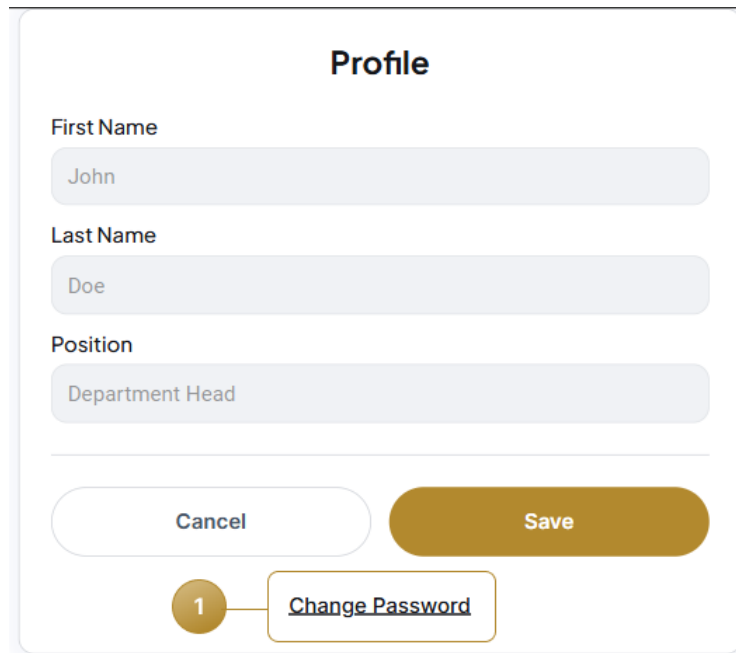
7 PROFILE PAGE

(Accessible by: *Managers & Department Heads)*

Profile

First Name

John

Last Name

Doe

Position

Department Head

Edit Profile

Logout
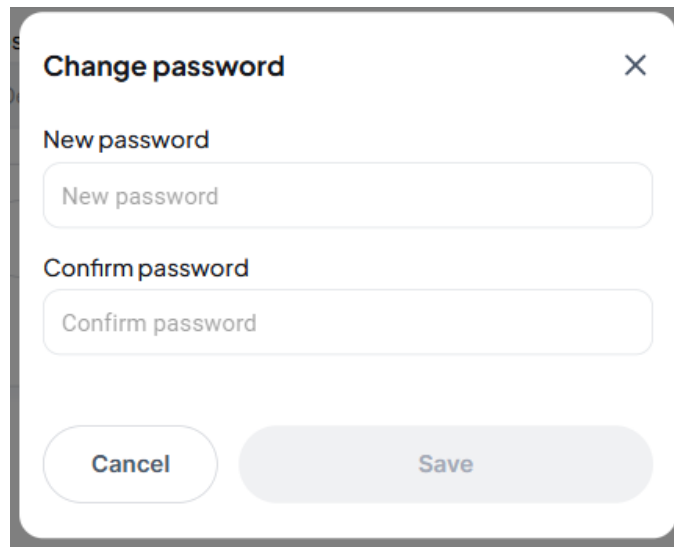
7.1 Change Password

1. Click on Edit Profile from the Profile Page

Profile

First Name

John

Last Name

Doe

Position

Department Head

Cancel   Save
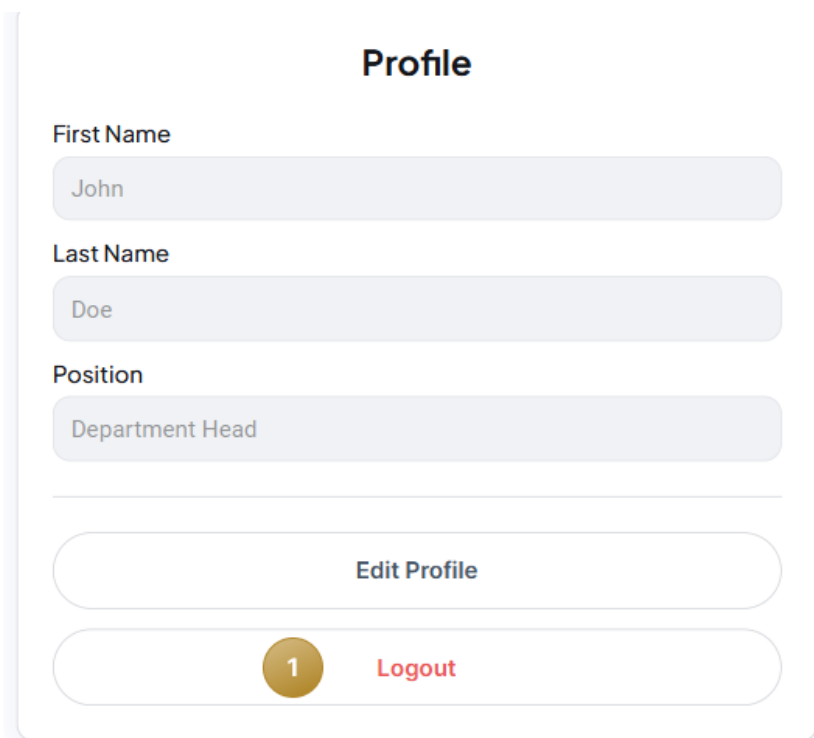
1 ── Change Password

Click on 'Change Password' and a modal will be displayed.

Enter your new password and click 'Save' button.

7.2 Logging Out

Click on 'Logout' button.