

Bellevue Operations Management System User Manual

Teddy Marc C. Enaje

Bicol University

MIS Intern

TABLE OF CONTENTS

1 MODULES	1
2 HOME PAGE.....	2
2.1 Issues Tab.....	2
2.2 Tasks Tab	3
2.3 Projects Tab	4
2.4 Top Performing Tab	5
3 TASKS PAGE	6
3.1 Creating Issue.....	7
3.2 Assigning a Task	8
3.3 Re-assigning a Task.....	9
3.4 Accept or Cancel a Task.....	10
3.5 Accomplish/Pending/Cancel Task	12
4 PROJECTS PAGE	14
4.1 Creating Project	16
4.2 Approving/Rejecting Project.....	17
4.3 Accomplish/Cancel Project.....	19
5 DEPARTMENTS PAGE	21
5.1 Adding new Position.....	22
5.2 Editing Position	22
5.3 Deleting Position	23
5.4 Adding new person/employee	24
5.5 Managing Employee Account Details.....	25
6 REPORTS PAGE	26
7 PROFILE PAGE.....	28
7.1 Change Password.....	28
7.2 Logging Out	29

1 MODULES

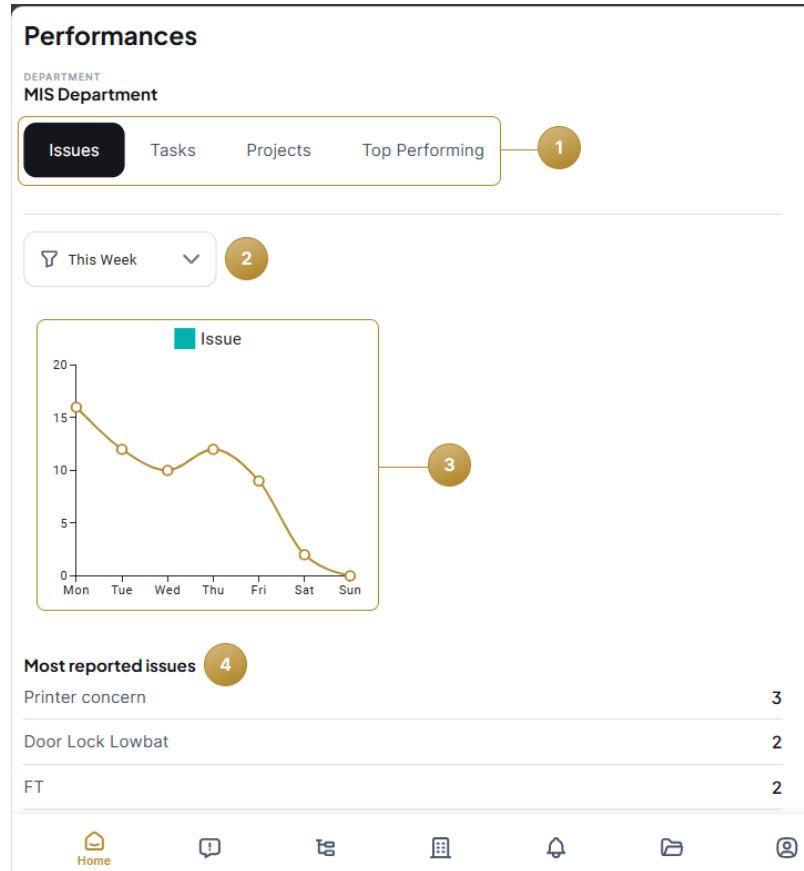


- 1. Home** – Navigates the user to the Metrics page
(Accessible by: Supervisors, Managers, Department Heads & Management)
- 2. Tasks** – Navigates the user to the Tasks page
(Accessible by: Supervisors, Managers, Department Heads & Management)
- 3. Projects** – Navigates to the Projects page
(Accessible 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

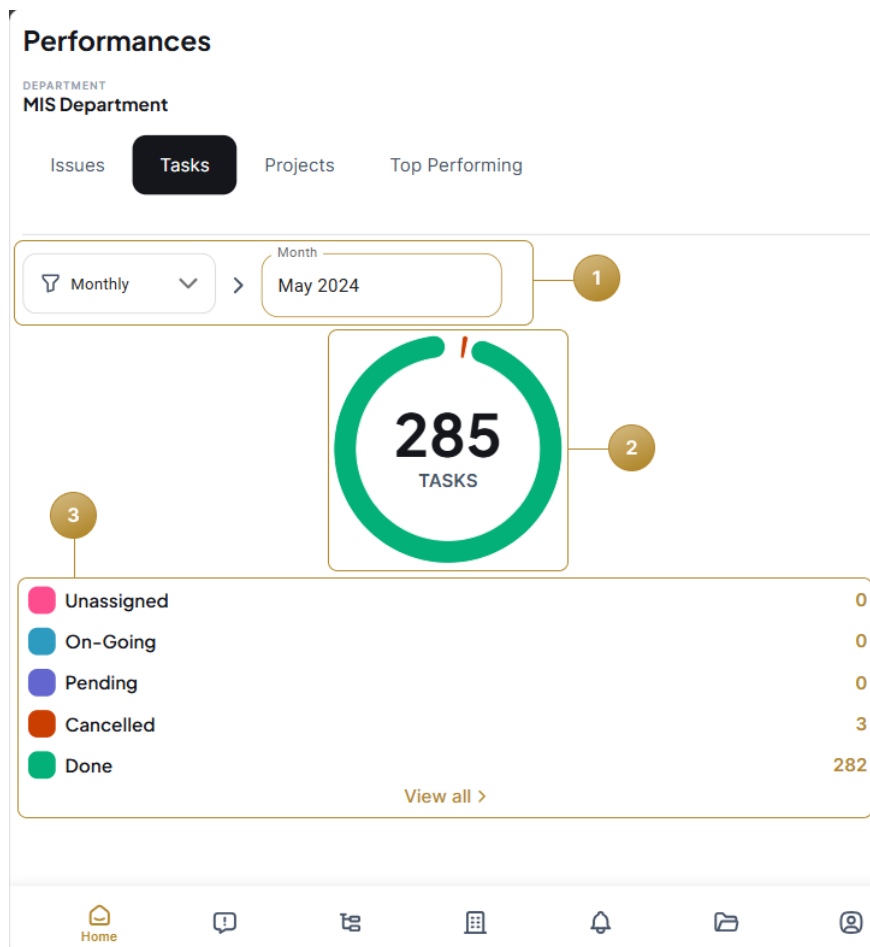
(Accessible by: Supervisors, Managers, Department Heads & Management)

2.1 Issues Tab



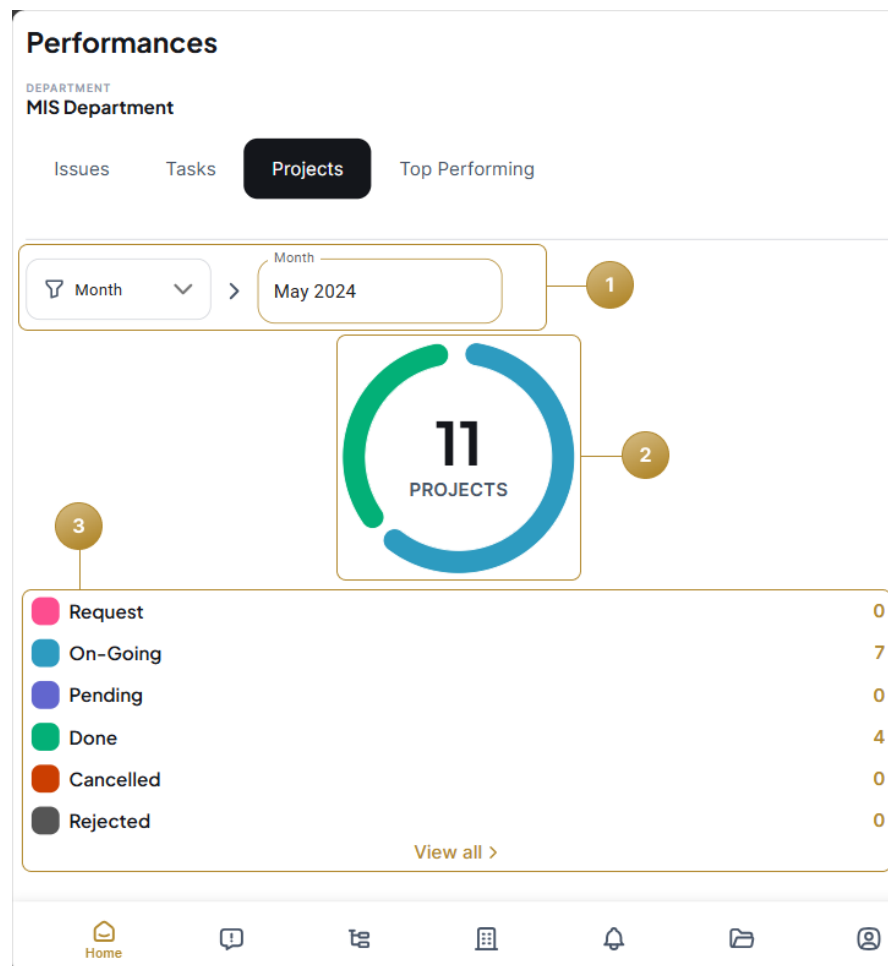
- 1. Menu Tab** – Use the navigation options to change the data displayed below.
- 2. Date Filter** – Filter the reported date of issues. Available options are: Daily, This Week, Month, and Year.
- 3. Line Chart** – Displays a visual representation of reported issues based on the selected date filter. 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



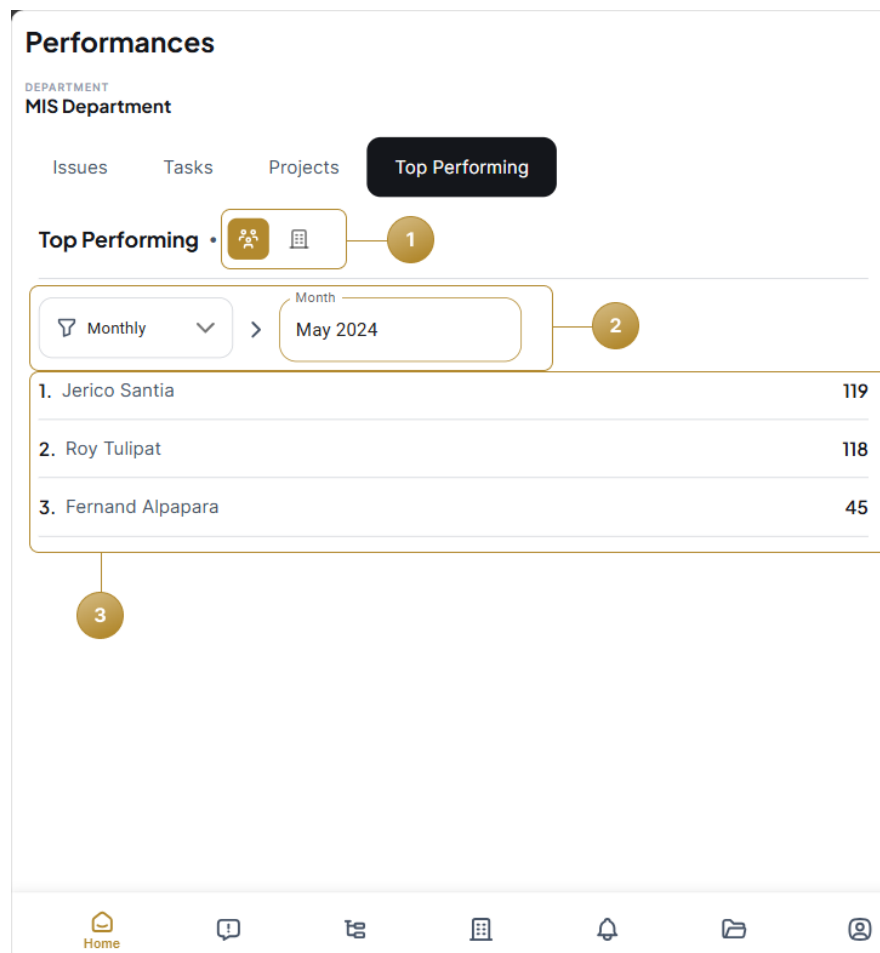
- 1. Date Filters** – Filter the tasks' status by date. Available options are: Daily, This Week, Month, and Year.
- 2. Doughnut Chart** – Displays the total tasks based on the selected date filter and shows a color indicator for the status of tasks. Click or tap a color to see the exact number of tasks.
- 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.

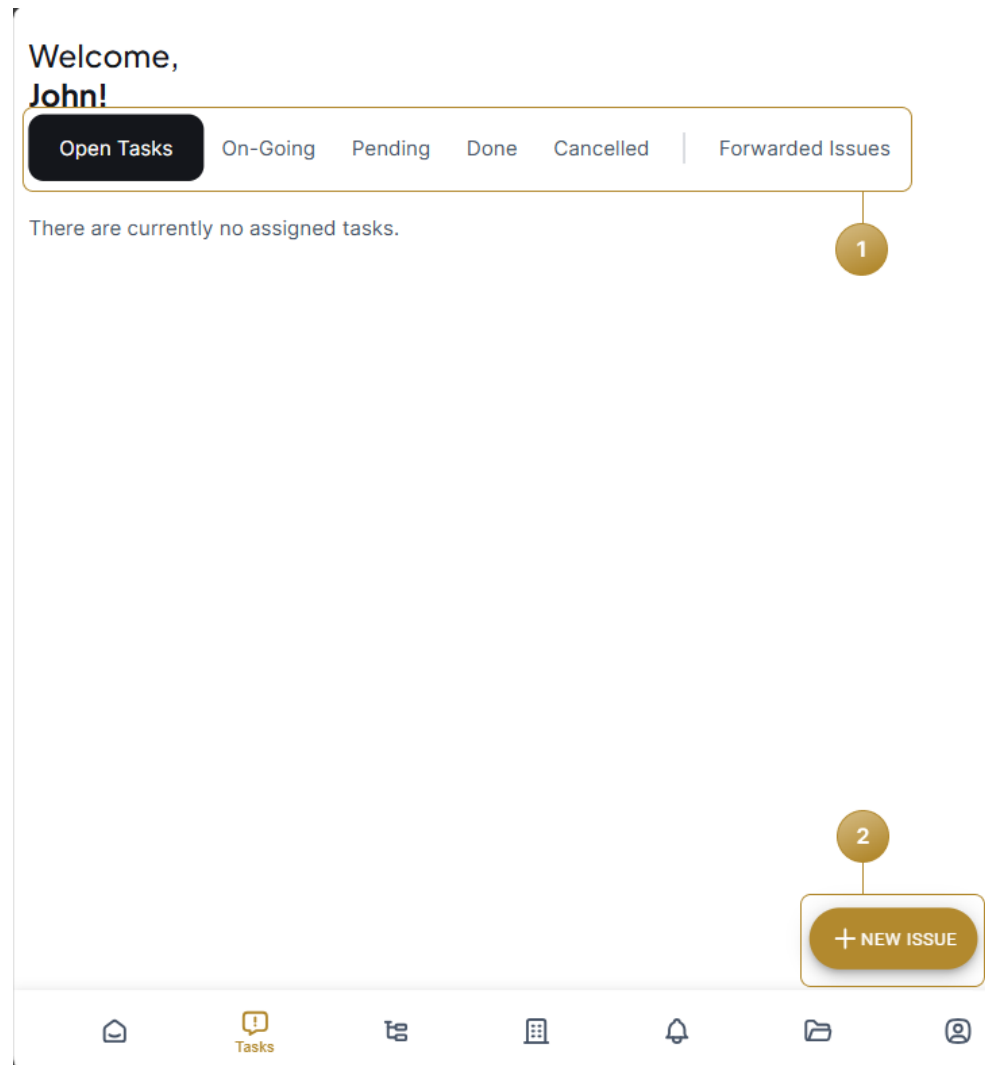
2.4 Top Performing Tab



- 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

The screenshot shows a web form titled "Report an Issue" with a back arrow. The form contains the following elements, each with a numbered callout:

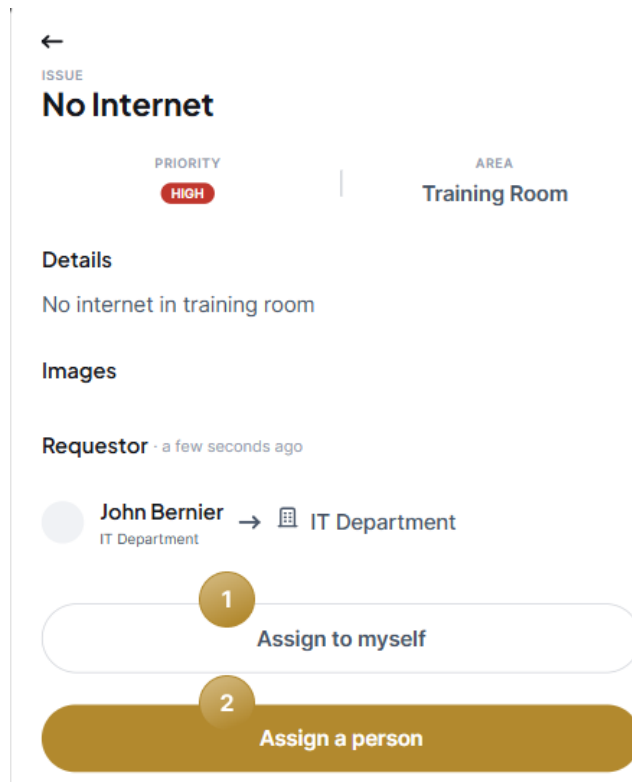
- 1**: "Area" label above a text input field with placeholder "Enter the area".
- 2**: "Concerned Department" label above a dropdown menu with a calendar icon and placeholder "Select department".
- 3**: "Issue" label above a dropdown menu with a speech bubble icon and placeholder "Enter issue".
- 4**: "Details" label above a large text area with placeholder "Explain the issue here".
- 5**: "Priority" label above a horizontal selection bar with four options: "1 LOW", "2 NORMAL", "3 MEDIUM", and "4 HIGH".
- 6**: "Add Image" button with a plus icon.
- 7**: "Submit Issue" button at the bottom of the form.

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.

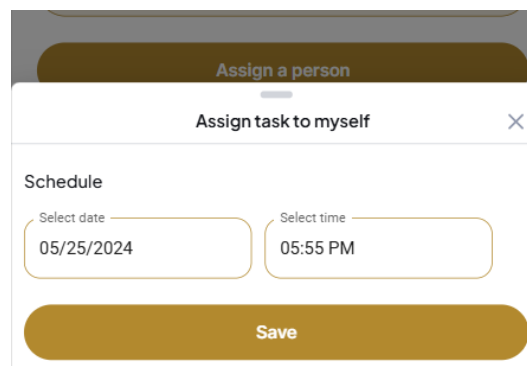
3.2 Assigning a Task

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



The screenshot shows a mobile app interface for an issue titled "No Internet". At the top, there is a back arrow, the word "ISSUE", and the title "No Internet". Below the title, there are two status indicators: "PRIORITY" with a red "HIGH" badge, and "AREA" with the text "Training Room". Underneath, the "Details" section shows "No internet in training room". The "Images" section is empty. The "Requestor" section shows "John Bernier" with a profile icon, "IT Department" below it, and an arrow pointing to a building icon labeled "IT Department". At the bottom, there are two buttons: "Assign to myself" (labeled with a circled '1') and "Assign a person" (labeled with a circled '2').

1. **Assign to myself** – Assign the task to yourself.



The screenshot shows a dialog box titled "Assign task to myself" with a close button (X) in the top right corner. Below the title, there is a "Schedule" section with two input fields: "Select date" with the value "05/25/2024" and "Select time" with the value "05:55 PM". At the bottom of the dialog, there is a large orange "Save" button.

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.

The screenshot shows a modal window titled 'Assign task' with a close button (X) in the top right corner. At the top, there is a button labeled 'Assign to myself'. Below this, the 'Assignee' section features a dropdown menu with a person icon and the text 'Select assignee'. The 'Schedule' section includes a 'Select date' field with the value '05/25/2024' and a 'Select time' field. At the bottom of the modal is a large 'Assign' button.

Select assignee from the dropdown and set a schedule in which the task should be accomplished and click Assign.

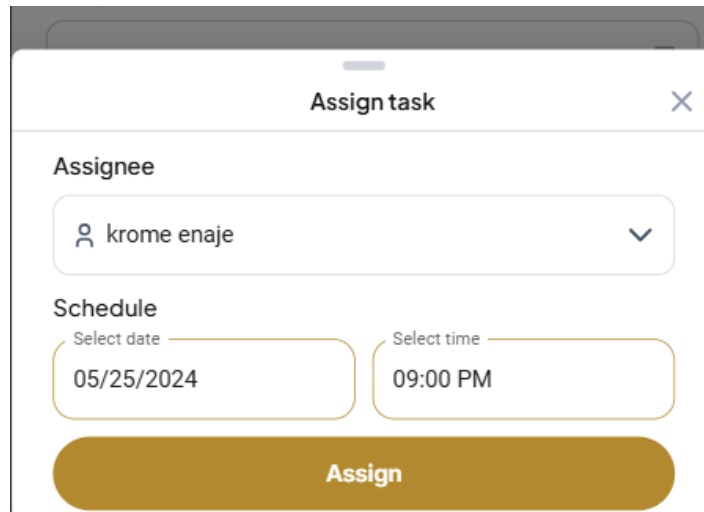
3.3 Re-assigning a Task

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'.

The screenshot shows a form for changing the assignee. It has a label 'Assignee' above a text input field containing 'krome enaje'. To the right of the input field is a clock icon. Below the input field is a button labeled 'Change assignee'.

2. Select new assignee and set a new schedule date.



The 'Assign task' dialog box features a title bar with a close button (X). Below the title bar, the 'Assignee' section contains a dropdown menu with a person icon and the text 'krome enaje'. The 'Schedule' section has two input fields: 'Select date' with the value '05/25/2024' and 'Select time' with the value '09:00 PM'. At the bottom is a large orange 'Assign' button.

Assign task

Assignee

krome enaje

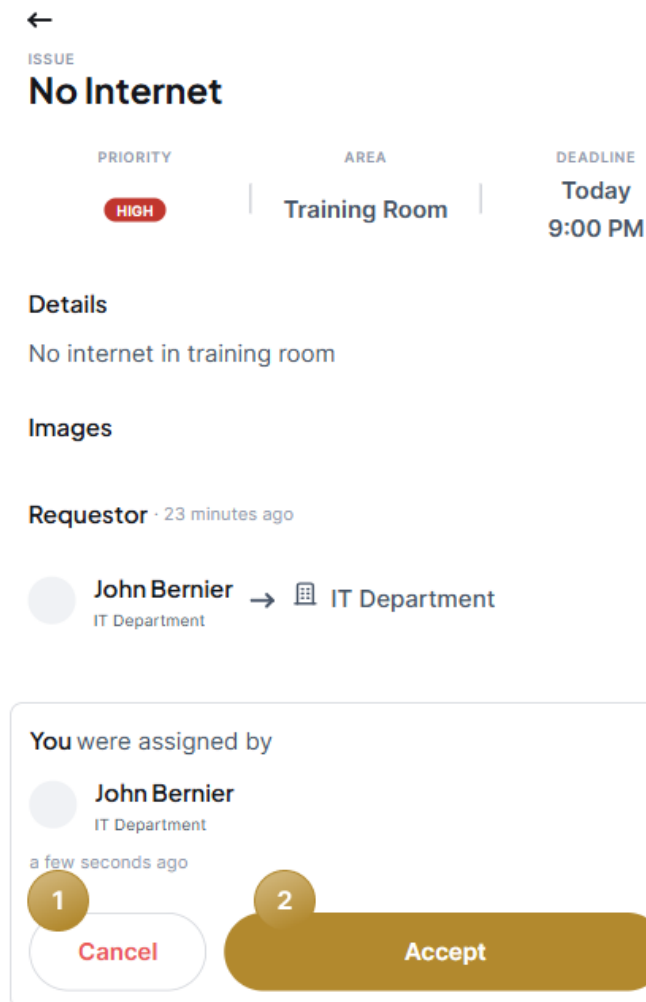
Schedule

Select date 05/25/2024

Select time 09:00 PM

Assign

3.4 Accept or Cancel a Task



The task details page for 'No Internet' includes a back arrow, the title 'No Internet', and metadata: 'ISSUE', 'HIGH' priority, 'Training Room' area, and 'Today 9:00 PM' deadline. The 'Details' section states 'No internet in training room'. The 'Requestor' section shows 'John Bernier' from the 'IT Department' with a timestamp of '23 minutes ago'. At the bottom, a box titled 'You were assigned by' shows 'John Bernier' from the 'IT Department' with a timestamp of 'a few seconds ago'. Below this are two buttons: 'Cancel' (labeled 1) and 'Accept' (labeled 2).

←

ISSUE

No Internet

PRIORITY HIGH

AREA Training Room

DEADLINE Today 9:00 PM

Details

No internet in training room

Images

Requestor · 23 minutes ago

John Bernier → IT Department
IT Department

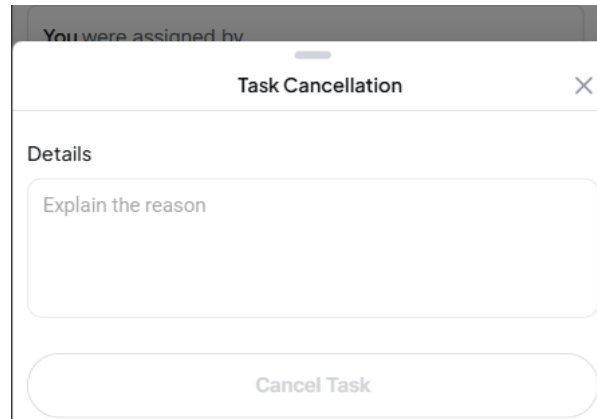
You were assigned by

John Bernier
IT Department
a few seconds ago

1 Cancel

2 Accept

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




The image shows a mobile application dialog box titled "Task Cancellation" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Details". Inside this section, there is a text input field with the placeholder text "Explain the reason". At the bottom of the dialog, there is a rounded rectangular button labeled "Cancel Task". Above the dialog box, a portion of another UI element is visible, showing the text "You were assigned by:".

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

You were assigned by

 **John Bernier**
IT Department

a minute ago

1

Accomplish

2 **Cancel**

3 **Pending**

1. **Accomplish** - Mark the task as completed.

Details

Task Completion ✕

Action taken

Describe the steps taken

Remarks

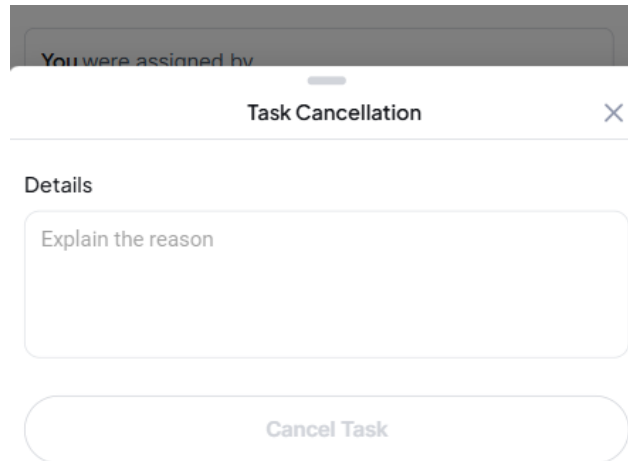
Add your comments here

+
Add Image

Accomplish

Enter what actions have been taken, remarks and optionally insert a snapshot as a proof.

2. Cancel - Terminate the task.



You were assigned by

Task Cancellation

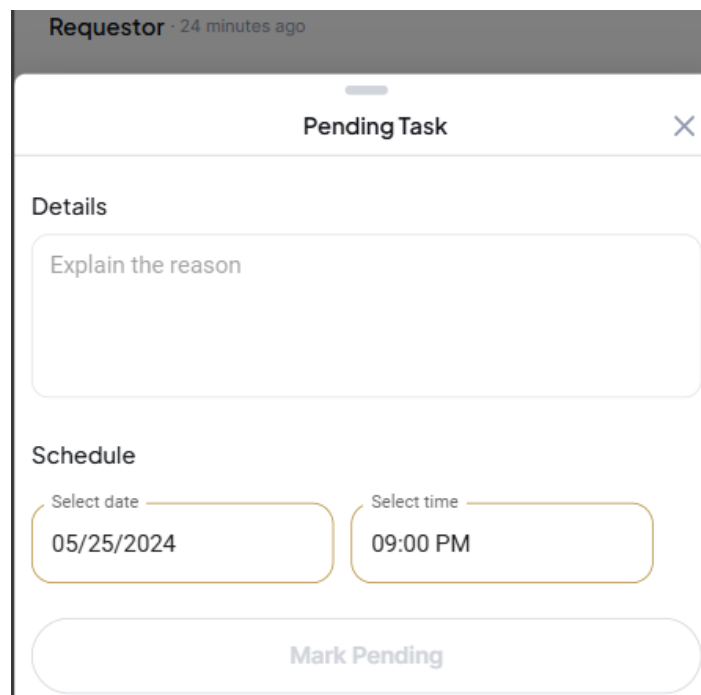
Details

Explain the reason

Cancel Task

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

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



Requestor · 24 minutes ago

Pending Task

Details

Explain the reason

Schedule

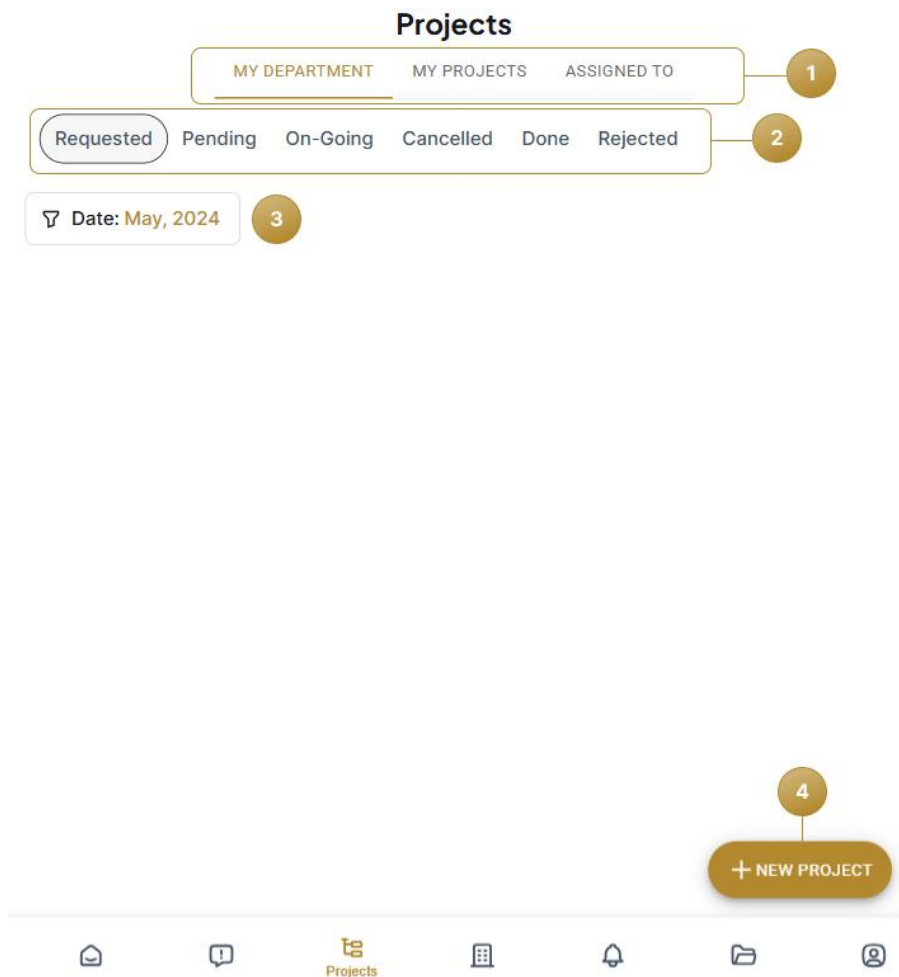
Select date 05/25/2024 Select time 09:00 PM

Mark Pending

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

← Create a project

Minor Major

1

Project Title

2

Project Location

3

Details

4

Personnel In-Charge

5

👤

Select the person in-charge

▼

Schedule

6

Select date

Select time

Deadline

7

Select date

Select time

8

Create 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.

← Edit

MINOR PROJECT

Bellevue OMS Training

requested by **John Bernier**
created on May 25, 2024 at 8:55 PM

IT Department
John Bernier

training room

START DATE **May 26, 2024** 12:00 AM → DEADLINE **May 31, 2024** 12:00 AM

Details
Train all departments to use Bellevue OMS

See Comments >

1 **Approve**

2 **Reject** 3 **Reschedule**

Home Chat Calendar Tasks Notifications Folder Profile

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

Train all departments to use Bellevue OMS

Reject Project ×

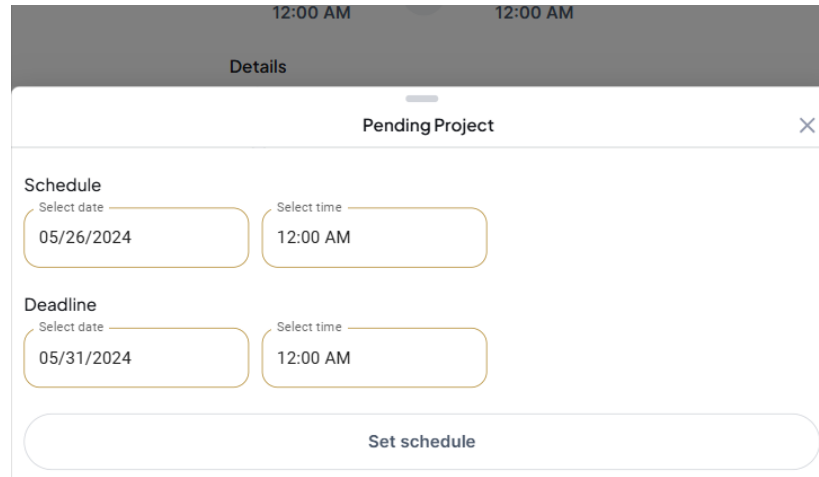
Details

Explain the reason

Reject Project

Enter a valid reason for rejecting the project and click 'Reject Project' button.

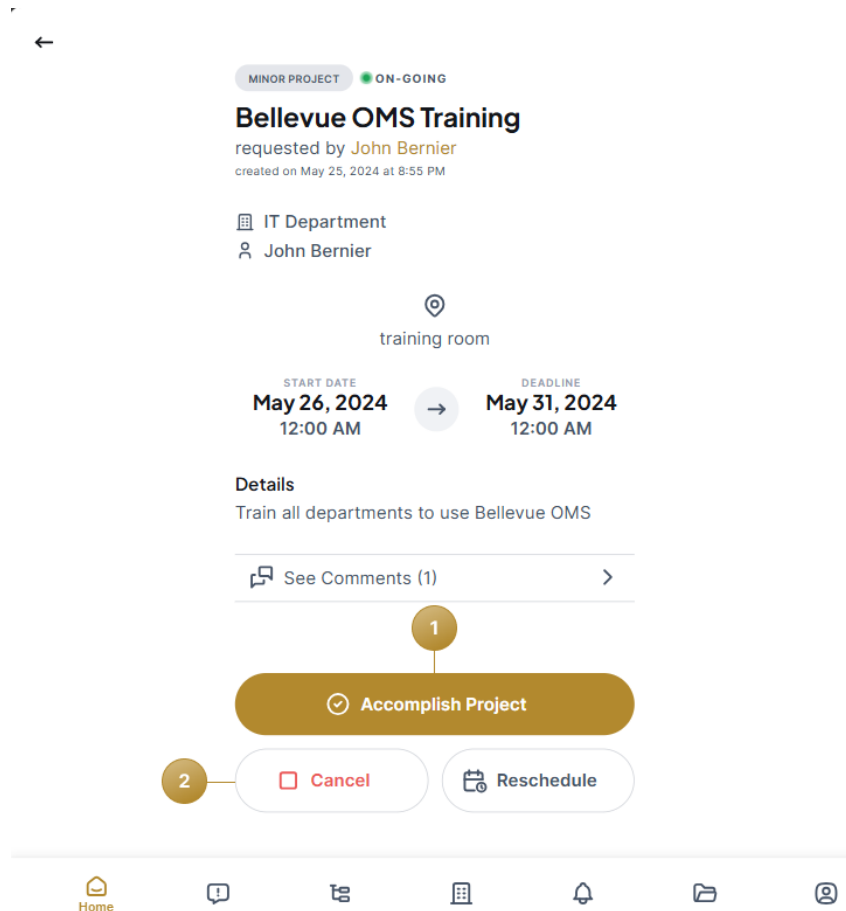
3. Reschedule – Pend & Set a new start date & end date of the proposed project.



The screenshot shows a mobile app interface with a 'Pending Project' modal. At the top, there's a 'Details' header. Below it, the modal title is 'Pending Project' with a close button. The 'Schedule' section has two input fields: 'Select date' with the value '05/26/2024' and 'Select time' with the value '12:00 AM'. The 'Deadline' section also has two input fields: 'Select date' with the value '05/31/2024' and 'Select time' with the value '12:00 AM'. At the bottom of the modal is a large button labeled 'Set schedule'.

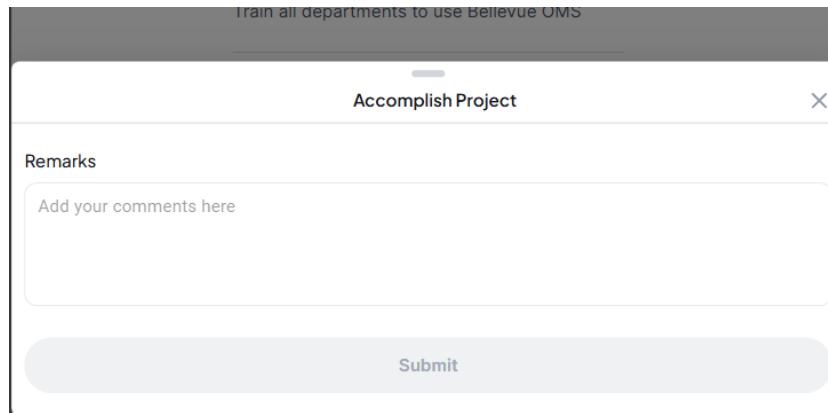
Set the new start date and end date of the project and click 'Set Schedule'

4.3 Accomplish/Cancel Project



The screenshot shows a mobile app interface for a project titled 'Bellevue OMS Training'. The project is marked as 'MINOR PROJECT' and 'ON-GOING'. It was requested by John Bernier and created on May 25, 2024 at 8:55 PM. The project is assigned to the IT Department and John Bernier. The location is 'training room'. The start date is 'May 26, 2024 12:00 AM' and the deadline is 'May 31, 2024 12:00 AM'. The details section says 'Train all departments to use Bellevue OMS'. There is a link to 'See Comments (1)'. At the bottom, there are three buttons: 'Accomplish Project' (labeled with a circled '1'), 'Cancel' (labeled with a circled '2'), and 'Reschedule'. The bottom navigation bar includes icons for Home, Messages, Tasks, Calendar, Notifications, Files, and Profile.

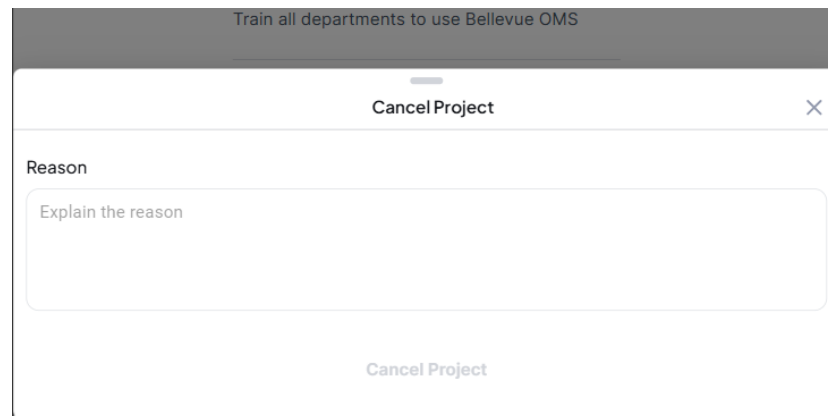
1. Accomplish Project – Accomplish and mark the project as completed.



The screenshot shows a dialog box titled "Accomplish Project" with a close button (X) in the top right corner. The dialog is part of a larger application window with a header "Train all departments to use Bellevue OMS". Inside the dialog, there is a section labeled "Remarks" with a text input field containing the placeholder text "Add your comments here". Below the input field is a large, light gray "Submit" button.

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

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

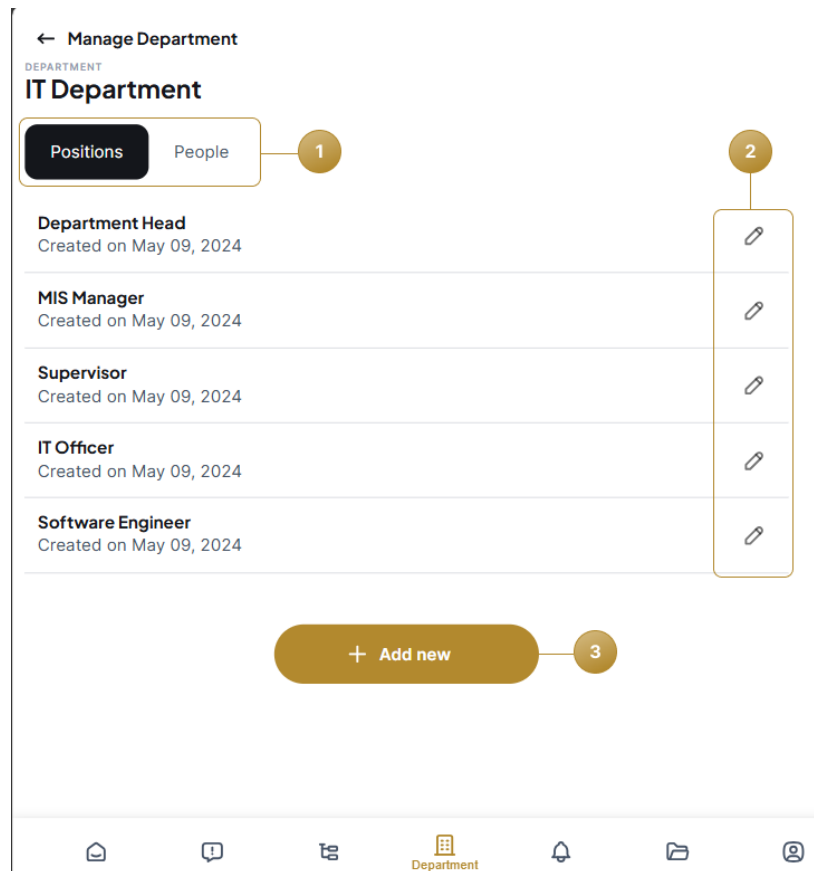


The screenshot shows a dialog box titled "Cancel Project" with a close button (X) in the top right corner. The dialog is part of a larger application window with a header "Train all departments to use Bellevue OMS". Inside the dialog, there is a section labeled "Reason" with a text input field containing the placeholder text "Explain the reason". Below the input field is a large, light gray "Cancel Project" button.

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

5 DEPARTMENTS PAGE

(Accessible by: *Managers & Department Heads*)



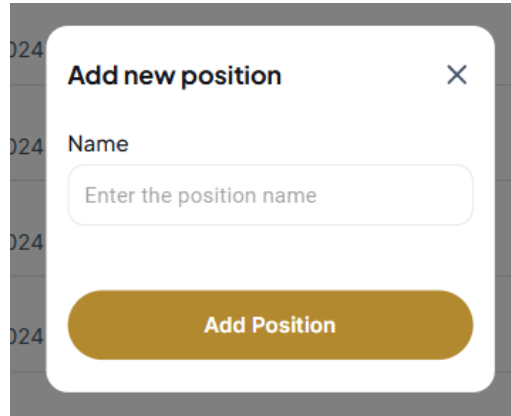
1. Menu Tab

- 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

A modal window titled "Add new position" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the placeholder text "Enter the position name". Below the input field is a large, rounded, olive-green button labeled "Add Position".

024

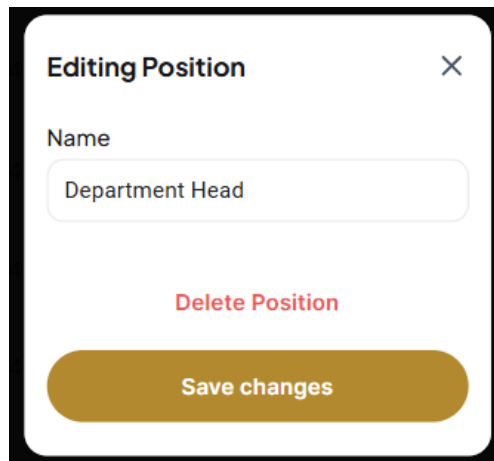
024

024

024

Enter new position name and click 'Add Position'.

5.2 Editing Position

A modal window titled "Editing Position" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the text "Department Head". Below the input field is a red text link labeled "Delete Position". At the bottom is a large, rounded, olive-green button labeled "Save changes".

Editing Position

Name

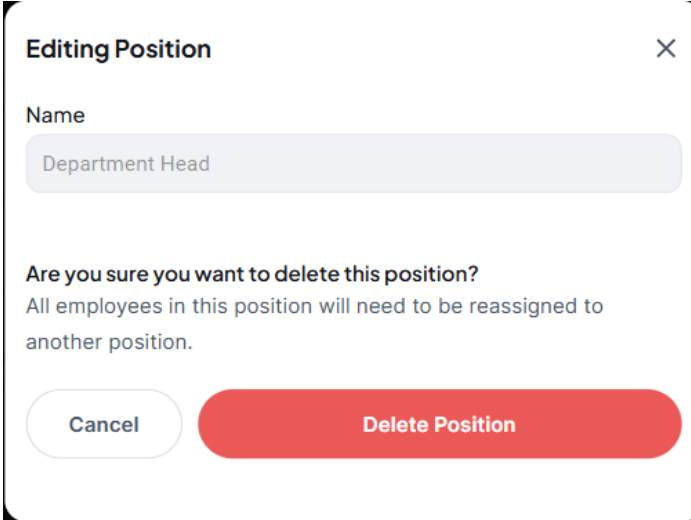
Department Head

Delete Position

Save changes

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

The screenshot shows a mobile application interface for managing a department. The background is a list of department members under the heading 'IT Department'. A modal form titled 'Adding new account' is overlaid on the screen. The form is divided into two sections: 'Account Details' and 'Login Details'. The 'Account Details' section includes fields for First Name, Last Name, Phone number, and a Position dropdown menu. The 'Login Details' section includes fields for Username and Change password. A blue 'Add user' button is at the bottom of the form. Two numbered callouts are present: '1' points to the 'Account Details' section, and '2' points to the 'Login Details' section.

Manage Department

DEPARTMENT

IT Department

Positions People

John Bernier
Department Head

krome enaje
IT Officer

jane doe
IT Officer

Adding new account

1

First Name
Enter the first name

Last Name
Enter the last name

Phone number
Enter phone number

Position
Select position

Login Details

2

Username
Enter username

Change password
Enter new password

Add user

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

Last Name
Bernier

Phone number
Enter phone number

Position
Department Head

Login Details

Username
john

☒ Change password

Change password
Enter new password

Archive user

Save changes

- 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

Issue











Search

Q

X

Date Created: May, 2024

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

<

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Print

Export Data

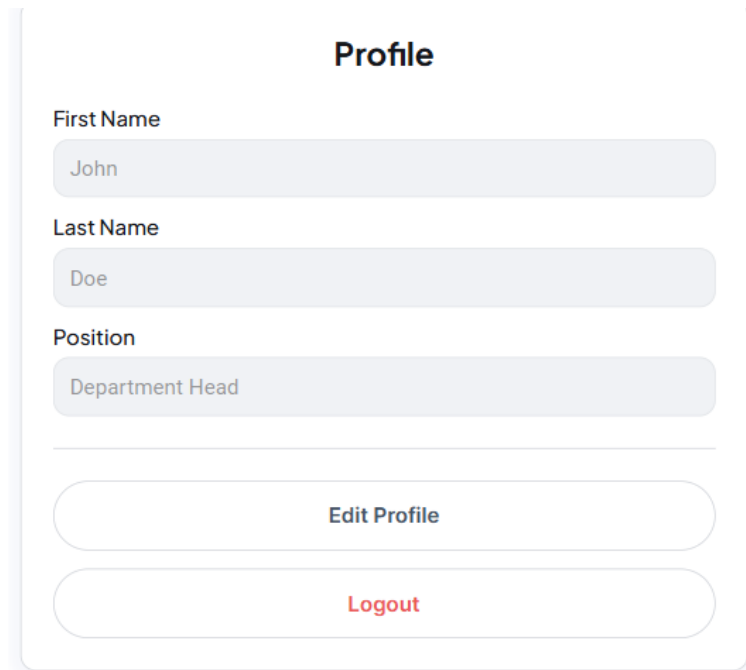
1. Menu Tab

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

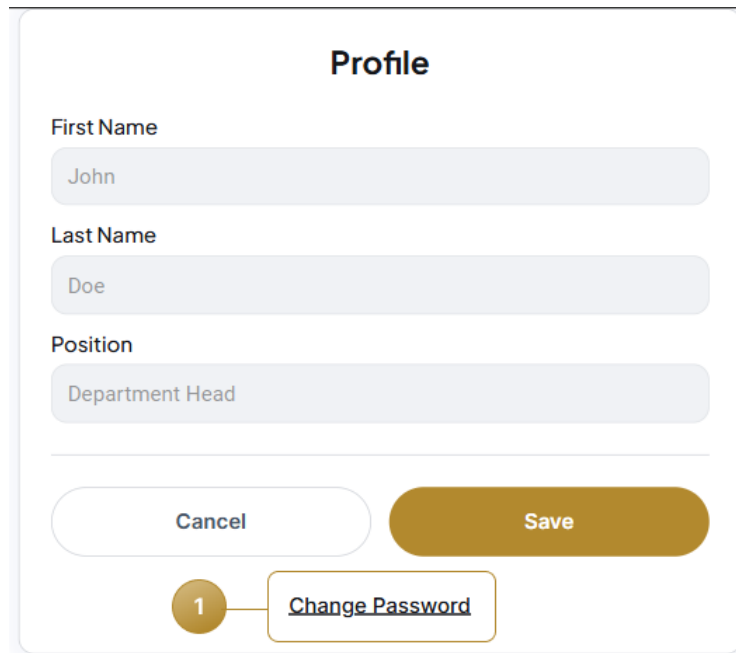
(Accessible by: *Managers & Department Heads*)



The screenshot shows a 'Profile' page with a title 'Profile' at the top. Below the title are three input fields: 'First Name' with the value 'John', 'Last Name' with the value 'Doe', and 'Position' with the value 'Department Head'. Below these fields are two buttons: 'Edit Profile' and 'Logout'.

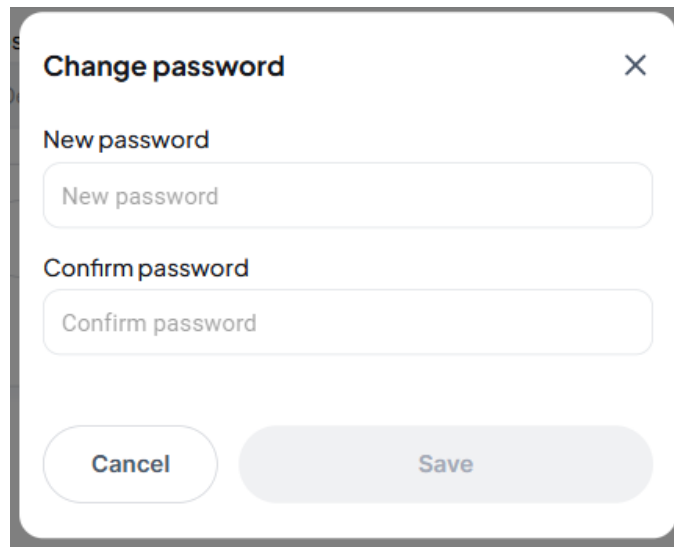
7.1 Change Password

1. Click on Edit Profile from the Profile Page



The screenshot shows the same 'Profile' page as before, but with additional buttons at the bottom: 'Cancel' and 'Save'. Below these buttons is a callout box with the number '1' and the text 'Change Password'.

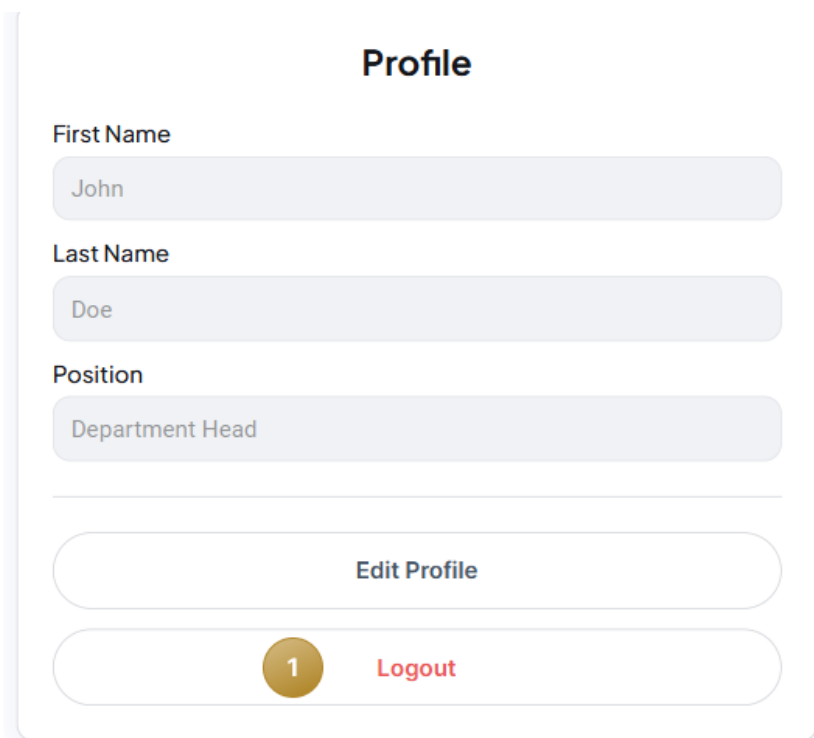
Click on 'Change Password' and a modal will be displayed.



A modal dialog box titled "Change password" with a close button (X) in the top right corner. It contains two input fields: "New password" and "Confirm password", both with placeholder text. At the bottom, there are two buttons: "Cancel" and "Save".

Enter your new password and click 'Save' button.

7.2 Logging Out



A user profile card titled "Profile". It contains three input fields: "First Name" with the value "John", "Last Name" with the value "Doe", and "Position" with the value "Department Head". Below these fields is a horizontal line. At the bottom, there are two buttons: "Edit Profile" and "Logout". The "Logout" button is highlighted with a gold circle containing the number "1".

Click on 'Logout' button.