visionstream CREATING TELECOMMUNICATIONS

VisCore Self Service

Quick Reference Guide – Build Self Service

Logging On

1. **https://selfservice.visionstream.co.nz/VisCore**
2. Enter your **User Name & Password** in the **Login** box
3. Click **Login**

Change Password

1. Click **My Account**
2. Enter your **Old Password**, a **New Password** then re-enter your new password in the Confirm **New Password** field.
3. Click **Change**

Dashboard - Home

1. Select Build Services

Status Report

Status	No of Work Orders
New Job Assigned	0
Jobs Accepted	13
Jobs Completed	7

Dashboard view of all new and accepted jobs

New Job Assigned

1. Click New Job Assigned to view all **new jobs**
2. New and Reassigned jobs will be colour coded:

- ReAssigned Jobs - New Jobs

3. To view the **job description**, Click on the job description icon
4. **Select** ☑ the job you wish to **accept**, then click on **Accept Jobs**, this will move the job into the accepted list
5. To **reject** a job, click on the **edit** icon and supply a reason for rejection, then click **Update**, this job will now **disappear** from your view.

Accepted Jobs (Work in Progress)

1. From the **dashboard** screen, click on the Jobs Accepted from the display list.
2. Or, click on the Accepted tab on the left of the **Home** menu.
3. To **edit** / **update** a Job, click on the view icon , this will display the » Work Order - all information pertaining to the job.

4. To view and edit the **task assigned**, select » Tasks & Codes , this displays three sectional panes:

- Tasks
- Design Build Documentation
- Payment Codes

View / Edit Tasks

1. Click in the line item to **select the task,** once selected, the line will display as grey, all attached documents and payment codes will now be displayed in the corresponding panes.
2. To view / download the documentation, click to open / save the document and print
3. To view / edit **payment code(s)**, click on the edit icon , **progress** can be tracked by entering the % Complete: 0 field, and when the code is 100% **complete** the correct date must be entered into the Completion Date : 29 field.

   Click on **Update** to save changes.
4. If **Sub-Contractors/Employees** are being used to perform this work, the names can you recorded in the Sub-Contractor1 : field, for record and reporting purposes.

Variations

1. Pre-approval must be gained from the Field Manager before any variations can be added.
2. Select the **Task** and scroll down to the **Payment Codes** pane
3. Click on Add new record in the **heading**.
4. Select appropriate **code** from the drop down list under Payment Code : Select
5. Enter required **quantity** Quantity : 1 and enter the Variation **Cause** and a **reason** for the variation, please note that these fields are **mandatory**

   Variation Cause : * Select Variation Reason : Mandatory
6. Click **Insert** to save changes.

Completing Tasks (for Payment)

1. Select the **Task**, and scroll down to the **Payment Codes** pane
2. Click on the edit icon and enter the **completed** date in the Completed : 1 field and click on **Update** to save changes.
3. Ensure all **Payments codes** are completed before entering the completed date at the Task level.

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4. Upload the As-Built documentation, select the Task and scroll down to the Design Build Documentation pane and click **Add new record**, select As-Built from the drop down Category
   Category : As-Built.
5. Click **Browse...** and navigate to where you saved the scanned file, select this file and click **Open**. The file path will now be displayed in Upload File : C:\Documen and click **Insert** to upload the file.
6. In the **Tasks** pane, click on the edit icon and enter the **completed** date in the Completed : 1 field and click on **Update** to save changes.
7. This will move the task to the complete list in the dashboard view. The Field Manager is required to **approve Tasks** before a Buyer Created invoice can be created
8. Completed and Approved dates can be viewed in the summary pane

Completed Date	Approved Date
13-Oct-2009	13-Oct-2009

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Invoices

1. Select **Invoices** from the tool bar at the top of screen.
2. These are sub-divided into the following categories:
- New Invoice
- Approved
- Disputed
- Resolved

Approving an Invoice

1. Click » New Invoice to view the invoice summary.
2. Click to view the invoice details, click on **Export to Excel** if required.
3. Click on Explorer back arrow to navigate back a screen.
4. To approve invoices, click and select Invoice Status : Approved, click **Update** to save changes. This will now move the invoice to the Approved category.

Disputing an Invoice

1. Click » New Invoice to view the invoice summary
2. Click to view the invoice details,
   - **Tip**: click on **Export to Excel** if required.
   - Click on Explorer back arrow to navigate back a screen.
3. To **dispute** invoices, click and select Invoice Status : Disputed, to resolve a dispute speedily, please provide a reason in the comments field Invoice Status Comments : , click **Update** to save changes. This will now move the invoice to the Disputed category.

Resolving an Invoice

1. Once a **Disputed** invoice is **resolved** by the Field Manager / Contract Admin it will appear in the Resolved category with a comment.
2. This can be either Approved or Disputed by clicking and selecting Approved or Disputed from the drop down selection Invoice Status : Approved, please remember to provide a reason if the invoice is once again disputed. click **Update** to save changes. This will now move the invoice to the Approved or Disputed category.

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Invoicing