



V6.09 Training Manual



Navigation



Find the freedom to focus on what matters with Nimbus

Contents

Opening Nimbus	3
The Nimbus Menu	3
Alternate Menu	4
Nimbus Banner	5
Navigation Techniques	6
Other Navigation Techniques	15

Document Information

Author	Phil Ivamy
QA	
Version	1
Date Created	16 September 2022
Date	16 September 2022

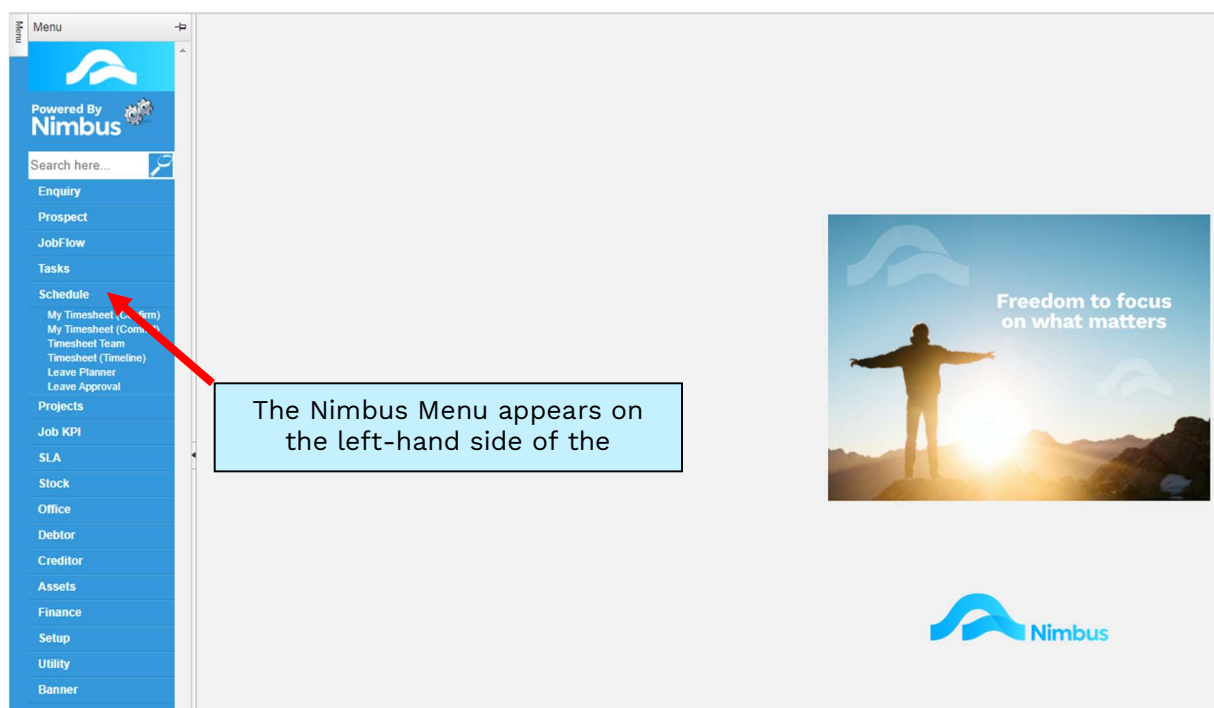
Opening Nimbus

The Nimbus database is accessed from the shortcut on your desktop.

The Nimbus Menu

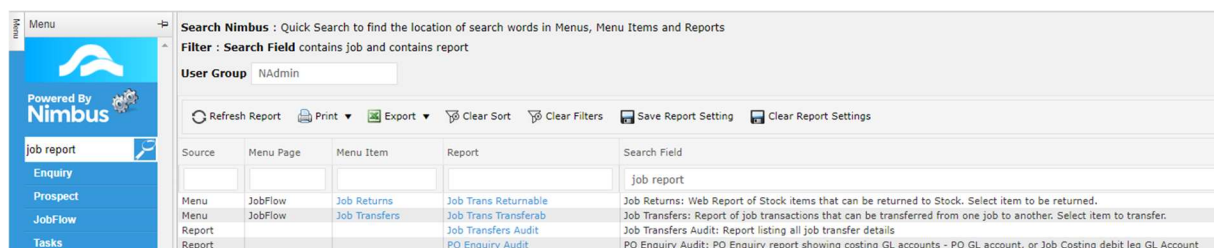
A menu is an important software navigation tool. It is used to initiate any action within Nimbus such as make enquiries, run reports, log/issue jobs, generate quotes, raise purchase orders, post time and materials, look up contact details and do anything else that may be added to it.

Understanding how to use the Nimbus Menu and navigate around it will increase your productivity.



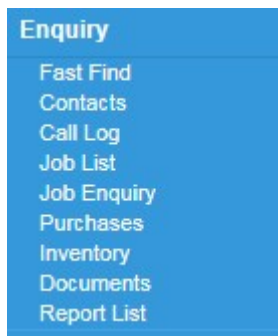
Search

The search function on the Nimbus menu will search through all the menus and reports to return any items that fit your selection criteria, e.g. if we search for 'job list' we will get something like this:



The Nimbus Menu is a list of section headings, e.g. Enquiry, Job Flow, Schedule, Projects, Office etc. Nimbus functions and reports can be accessed from each of these section headings.

To expand the list of available menu items grouped under a section heading:

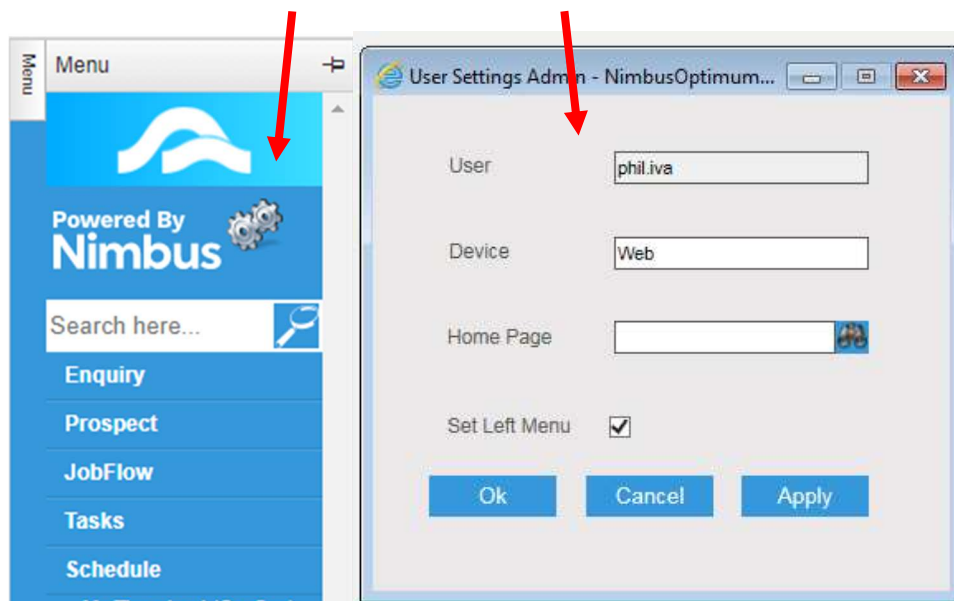


Menu items listed under a section heading can link to a Nimbus Application or to a Nimbus Report. You will belong to a user-group, which reduces the menu items down to those ones that are relevant to you.

To compress the list of available menu items grouped under a section heading, click on the section heading again.

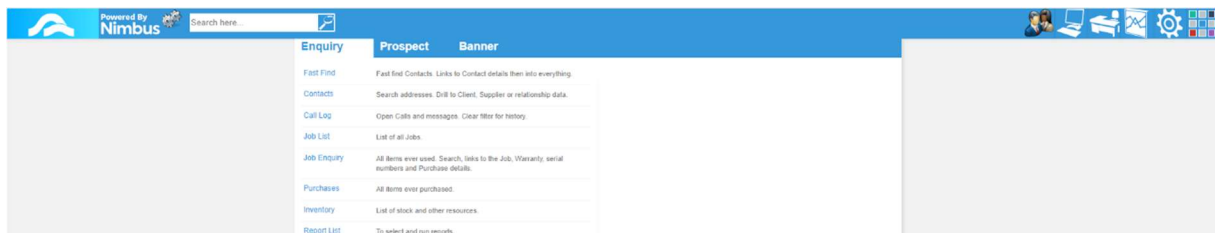
Alternate Menu

If you click on the cog, you will get this box



Here you can set a unique home page to yourself eg Jobs List or Overdues and this will be the homepage you get whenever you log in to Nimbus.

Unclicking the **Set Left Menu** will replace the Intranet style menu with a **Banner** style menu



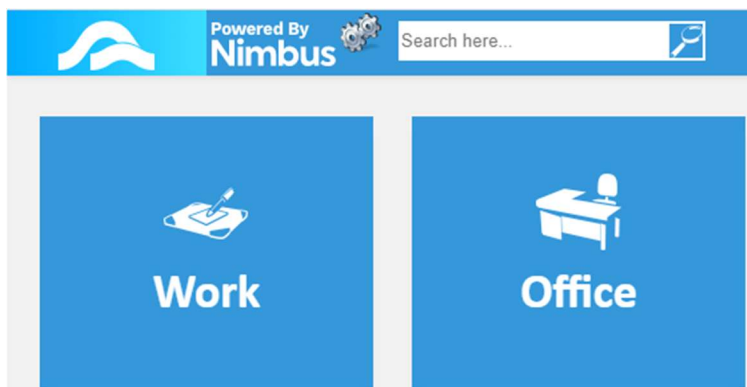
Which is better suited to tablets etc and contains no left hand menu:



Also clicking on the tiles in the top right

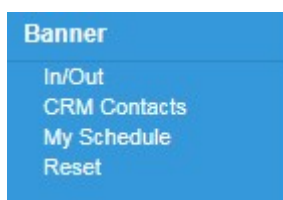


Renders a Tile menu



Nimbus Banner

The Nimbus Banner is now its own Menu selection:



It can be used to hold items which are referred to often i.e. In/Out, CRM Contacts, My Schedule, Reset, are standard but other items can be added.

1. In/Out - This page displays the Employees, with special functions to record when they are out and when they intend to be back. Sites use this as part of their safety process, providing information on who is in the Building.

In/Out Report

Name: Adam [dropdown] In Out Lunch At Home

Current Location: Working at home Meeting Leave Sick

Return Time: 28-Nov-2018 8:30 [calendar icon] Add an hour Add a day

Apply Refresh

Branch	Division	Employee	Name	Cell Phone	Current Location
	Engineer	Adam	Adam	02102792355	Working at home
		Amy.Lang	Amy.Lang		
	Plumbing	Andria	Andria		

2. CRM Contacts - This opens the CRM Contacts page. CRM contacts enables you to record many people to one organisation e.g. employees or one person to many organisations e.g. Automotive Electrical.

CRM Contacts : All Organisations and the People associated with them
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

First Name	Last Name	P...	Job Title	Organisation	PO Box	City	In...	Log Work	Log Call	Rating	Org His...	C...	U...	Call His...	Phone	Shortname	Mobile	Ol...
new				A1 Concrete Pumping Ltd	PO Box 2285	Nelson		Both	ORG		1				5443199	A1 Con		
new				Adam Langbridge	54 Mount St.	Nelson		Suppl...	ORG		1					Adam		
new				ADC International	1327 Broadway	New York		Client	ORG							ADCInt		
new				Amit Prakash					ORG							APrakash		
new				Andria					ORG							Andria		
Phil	McCain		Accounts	Automotive Electrical	PO Box 567	Nelson	2	Client	CRM	Gold	3			+64 (03) 208 1508	AutoElec	0345677	0	
Gary	Brockins...		Chief Executive Officer	Automotive Electrical	PO Box 567	Nelson	0	Client	CRM	Gold	3			03 4548383	AutoElec	0217767833	0	
William	Smith		Manager	Automotive Electrical	PO Box 567	Nelson	2	Client	CRM	Gold	3		1	+64 (03) 208 1508	AutoElec	0272895554	0	
Mark	Haversha...		Engineering Manager	Automotive Electrical	PO Box 567	Nelson	0	Client	CRM	Gold	3			+64 (03) 208 1508	AutoElec	027289451	0	

3. My Schedule - This opens the Users personal schedule. Use of the schedule is covered in a separate training document.
4. Reset – This button resets your Web User Profile i.e. if your rights to a particular report have been altered, clicking on the Reset item will update these immediately.

Navigation Techniques

Information from the Nimbus database is generally displayed in reports.

In addition to presenting information, Web reports also act as a mini menu. Many of the columns are blue hyperlinks that act as a Link to either a report or an edit form. When clicked on they may open another report to allow you to drill to more information, take you to a report to find related information, or open a Nimbus Form or Application to enable you to update or capture information.

E.G. Fast Find report

Contacts Fast Find : Contacts only, fast searching.
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Shortname	Name	Phone	Street	Suburb	City
A1 Con	A1 Concrete Pumping Ltd	5443199	128 Main Rd	Stoke	Nelson
Adam	Adam Langbridge		56 Mount St		Nelson
ADCInt	ADC International		1327 Broadway		New York
Andria	Andria				
APrakash	Amit Prakash				
AutoElec	Automotive Electrical	+64 (03) 208 1508	25 Tay Street	SunnySide	Nelson 7020
Baily	Baily & Sons Ltd	+64 (03) 208 1381	56 Long St	Stoke	Gore
Baldrick	Baldrick Plumbers	+64 (09) 215 7351	29 Manners Street	Browns Bay	Auckland
Bartlett	GB Bartlett & Co Ltd	+64 (03) 208 2777	27 Horse Road		Marlborough
Benzi	Benzi Knees Pickup Serv	+64 (09) 208 1254	453 Main Street	Highland Park	Auckland
Blight	Blight Electrical	+64 (06) 356 4561	49 Todd Road		New Plymouth
Bloomers	Bloomers Floral Display	+64 (03) 208 2016	354 Daisy Road	Ilam	Christchurch

Sorting

Each column in a report has a header located in the Header Row

Contacts Fast Find : Contacts only, fast searching.
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Shortname	Name	Phone	Street	Suburb	City
A1 Con	A1 Concrete Pumping Ltd	5443199	128 Main Rd	Stoke	Nelson
Adam	Adam Langbridge		56 Mount St		Nelson
ADCInt	ADC International		1327 Broadway		New York
Andria	Andria				
APrakash	Amit Prakash				
AutoElec	Automotive Electrical	+64 (03) 208 1508	25 Tay Street	SunnySide	Nelson 7020
Baily	Baily & Sons Ltd	+64 (03) 208 1381	56 Long St	Stoke	Gore
Baldrick	Baldrick Plumbers	+64 (09) 215 7351	29 Manners Street	Browns Bay	Auckland
Bartlett	GB Bartlett & Co Ltd	+64 (03) 208 2777	27 Horse Road		Marlborough
Benzi	Benzi Knees Pickup Serv	+64 (09) 208 1254	453 Main Street	Highland Park	Auckland
Blight	Blight Electrical	+64 (06) 356 4561	49 Todd Road		New Plymouth
Bloomers	Bloomers Floral Display	+64 (03) 208 2016	354 Daisy Road	Ilam	Christchurch

To sort a column in alphabetical and/or numerical order, click the Header Column Name in the Header Row immediately above the column to be sorted.

Once a column has been sorted, a small black arrow will appear to the right of the header to indicate this column has been sorted, as follows:

- ↑ Sorting is in ascending alphabetical and/or numerical order. ▲ City
- ↓ Sorting is in descending alphabetical and/or numerical order. ▼ City

Click the Header Column Name to switch between ascending and descending order.

Filter Fields

Web reports will often display more than you need. Learning the filtering techniques helps you to locate the information required. A filtering field exists above each column in each report, as shown below.

Contacts Fast Find : Contacts only, fast searching.
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings


Shortname	Name	Phone	Street	Suburb	City
A1 Con	A1 Concrete Pumping Ltd	5443199	128 Main Rd	Stoke	Nelson
Adam	Adam Langbridge		56 Mount St		Nelson
ADCInt	ADC International		1327 Broadway		New York
Andria	Andria				
APrakash	Amit Prakash				
AutoElec	Automotive Electrical	+64 (03) 208 1508	25 Tay Street	SunnySide	Nelson 7020
Baily	Baily & Sons Ltd	+64 (03) 208 1381	56 Long St	Stoke	Gore
Baldrick	Baldrick Plumbers	+64 (09) 215 7351	29 Manners Street	Browns Bay	Auckland
Bartlett	GB Bartlett & Co Ltd	+64 (03) 208 2777	27 Horse Road		Marlborough
Benzi	Benzi Knees Pickup Serv	+64 (09) 208 1254	453 Main Street	Highland Park	Auckland
Blight	Blight Electrical	+64 (06) 356 4561	49 Todd Road		New Plymouth
Bloomers	Bloomers Floral Display	+64 (03) 208 2016	354 Daisy Road	Ilam	Christchurch

Filters remove the line items that you do not need and display only those line items that you want to make further enquiries on. Each time a filter is used, the information in the report will be reduced. If the report still displays too much information, use the other filters until you find the information you want.

To use a filter:

- Enter the information you know into the appropriate filter field. Sometimes entering less in the filter is better than more e.g. entering key words is often better than guessing the exact detail. Note that as soon as you do this 'Apply Filter' appears where the 'Run Report' button was, above the report.

Contacts Fast Find :
Filter : No Filter

! Apply Filter 

Shortname

EG enter 'drive'

Shortname	Name	Phone	Street	Suburb
			drive	
A1 Con	A1 Concrete Pumping Ltd	5443199	128 Main Rd	Stoke
Adam	Adam Langbridge		56 Mount St	
ADCInt	ADC International		1327 Broadway	

- To action the filter, click on **Apply Filter** or press the **Enter** key. The line items that do not contain the characters in the filter field will be removed from the report.

Tips on using filters:

- Entering two key words with a space between in the filter field - the column is filtered to show records where the column contains either word e.g. drive [space] ta returns all records that contain drive and ta; would pick up Tahunanui Drive or Takapuna Drive:

Shortname	Name	Phone	Street	Suburb
			drive ta	
ElecDepot	Electrical Depot	+64 (03) 208 1588	56 Tahunanui Drive	Tahunanui
LandonPl	Landon Plumber Ltd	+64 (09) 208 1127	345 Takapuna Drive	North Shore

- Entering two key words with "or" between in the filter field - the column is filtered to show all records that contain either word e.g. entering drive or ta would return records such as Blank Drive, Tainsley St etc.:

Shortname	Name	Phone	Street	Suburb
			drive or ta	
AutoElec	Automotive Electrical	+64 (03) 208 1508	25 Tay Street	SunnySide
Captcook	Captain Cook Hooks	+64 (03) 208 2524	98 Blank Drive	
CLWell	Computerland Wellington	+64 (04) 598 4904	45 Tairi Rd	
ElecDepot	Electrical Depot	+64 (03) 208 1588	56 Tahunanui Drive	Tahunanui
GeneralMotor	General Motors	+1 (716) 542 1001	345 Tainsley St	
HirePool	Hire Pool Tahuna	03 547839	123 Muritai St	Tahuna
LandonPl	Landon Plumber Ltd	+64 (09) 208 1127	345 Takapuna Drive	North Shore
NMHS	Northern Municipal Health Serv	+64 (09) 234 2011	20-90 Tasman Rd	
Vector	Vector	312312312	5-25 Shakespeare Drive	

- Entering a filter with a preceding '=' - the column will be filtered to include only exact matches.

Date Range Filtering

Whenever the date range symbol  appears in a report next to Date, the report is able to be filtered by period.

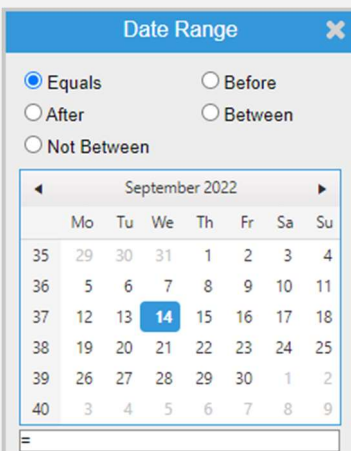
You can enter the date filter directly into the filter field, for example:

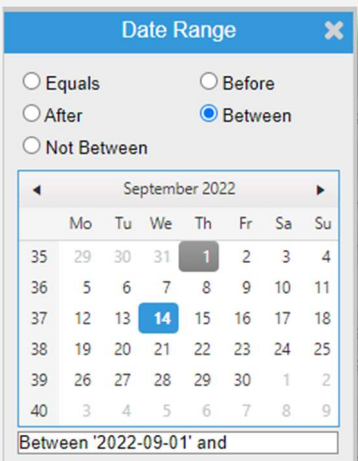
31-3-2013: equals 31 March 2013

< 31-3-2013: less than 31 March 2013


> 31-3: greater than 30 March of current year.

Alternatively, click on the date range symbol and then click on the required option to select a date range, as follows:

<p>Equals</p>	<p>Use the drop down boxes to choose a month and year then click on a date on the calendar. This will return you to the report. Only the line items with the selected date are displayed once the filter has been activated by the Apply Filter button.</p>	
<p>Before</p>	<p>Only the line items with a date before the selected date are displayed.</p>	

After	Only the line items with a date after the selected date are displayed.	
Between	Click on the Between button and the first date in your date range i.e. 19-3-2013. Now click on the end date in your range e.g. 27-3-2013. Now click the Apply Filter button. The report displays only the line items in the selected period inclusive of the dates selected	
Not Between	Click on the Not Between button and the first date of your date range e.g. 19-3-2013. Now click on the end date in your range e.g. 27-3-2013. Now click the Apply Filter button. The report displays only the line items outside the selected period	

Number Range Filtering

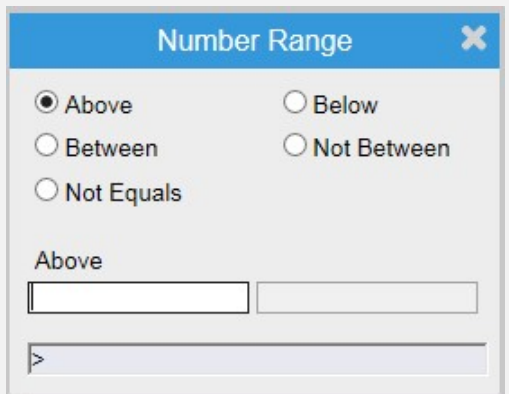
Whenever the number range symbol  appears in a report, the report is able to be filtered by number.

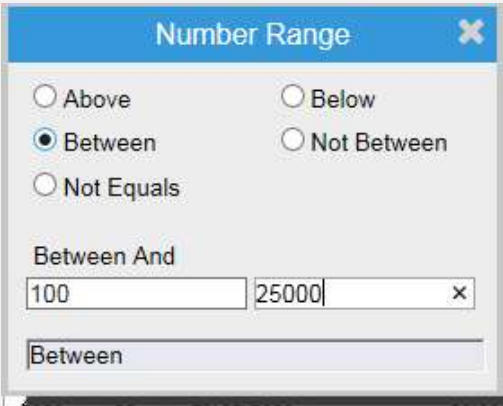
GL Movement Summary : Summary of GL Account movements showing opening and closing balances by period
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

GL Index	Branch	Division	Summary	Category	Description	Fin Year	Fin Month	Period	Opening Balance	Movement Amount
1010100	HO	Engineer	Income	Jobbing	Engineer Sales	2015	07	31/10/2014	\$0.00	-\$1,339.76
1010100	HO	Engineer	Income	Jobbing	Engineer Sales	2015	08	30/11/2014	-\$1,339.76	-\$3,002.04
1010100	HO	Engineer	Income	Jobbing	Engineer Sales	2015	09	31/12/2014	-\$4,341.80	-\$6,358.09
1010100	HO	Engineer	Income	Jobbing	Engineer Sales	2015	10	31/01/2015	-\$10,699.89	-\$15,896.79
1010100	HO	Engineer	Income	Jobbing	Engineer Sales	2016	11	29/02/2016	\$0.00	\$0.00

Either enter in the filter directly e.g. = 4, or click on the number range symbol and then click on the required option to select a number range, as follows:

Above	Enter a numerical amount in the Above field. Click the Enter key and Apply Filter to display only those line items with an amount greater than the number entered.	
--------------	--	--

<p>Below</p>	<p>Enter a numerical amount in the Below field. Click the Enter key and Apply Filter to display only those line items with an amount less than the number entered.</p>	
<p>Between</p>	<p>Enter a numerical amount in the In Between field and the And field, i.e. Between 100 And 25000. Click the Enter key and Apply Filter to display only those line items within the specified range.</p>	
<p>Not Between</p>	<p>Enter a numerical amount in the Not Between field and the And field, i.e. Not Between 1000 And 2000. Click the Enter key and Apply Filter to display only those line items outside the specified range.</p>	
<p>Not Equal To</p>	<p>Enter a numerical amount in the Not Equal To field, i.e. not equal to 10. Click the Enter key and Apply Filter to display all line lines that do not equal the given number.</p>	

Note – to quickly access different periods easily, instead of using the arrows, you can click on the date as shown:

SPECIAL NOTE:

You can enter filter commands directly into the filter fields once you know how. For example:

=5 will display only those line items that equal 5

>5 will display only those line items where the quantity is greater than 5

<5 will display only those line items where the quantity is less than 5


>=5 will display only those line items where the quantity is equal to 5 or above 5

<=5 will display only those line items where the quantity is equal to 5 or below 5

<>5 displays only those line items not equal to 5





Not only is this method of filtering quicker, it also means that you can filter the information held in any report column whether that column has a filtering icon beside the filter field or not.

Database Search

Whenever the search symbol  appears in a report, a search tool is able to be used for that column. Click on the search symbol to display a summarised listing. Select the item you want or use the filter fields in the search tool to locate the item you want e.g. Timber in the category field. The selected item(s) are now displayed.

Resource List : Stock and all other resource details for searching and analysing.
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting

Branch	Stock Group	Cate... Group	Category	Section	Code	Description	On Hand	Ord
								
	Stock			Stock	sample stock	sample stock code	0	
	Labour	TIME	TProd	Time	L	Labourer	0	
	Boug...	NonS...	BoughtIn	StockNS	NBI	Bought In special item - enter details	0	

Links

Each report has several columns. Some columns are underlined and coloured blue and others are black.

- The blue columns generally link to other reports; they can also be linked to documents, web pages, other applications etc.
- The black columns are read-only.



To find out where a blue column in any report will link to, hold your mouse over one of the items in a blue column. The mouse pointer may turn into a hand and after a moment a dialog box will appear beside the hand. The message inside the dialog box tells you where the link goes.

A link to a Web Report means that when you click on any item in this column, the report will open.


In addition, it will filter directly to the report for the item (row) you clicked on. E.G. clicking on Job NO WKE-5:

Jobs List : List of jobs for listing, selection and drilling.
Filter : Job Number contains wk




Refresh Report Print Export Clear Sort Clear Filters

Branch	Client	Order Number	Project	Job Number	Description
				wk	
	JarrettD		WKE	WKE-Z	Retentions
	JarrettD		WKE	WKE-5	Plumbing
	JarrettD		WKE	WKE-4	Electrical
	JarrettD		WKE	WKE-3	Portals
	JarrettD		WKE	WKE-2	Slab
	JarrettD		WKE	WKE-1	Prelim & General

Leads to this report

Job Enquiry : Job enquiry totalled per Item
Filter : Client equals JarrettD
Job No 'WKE-5' 

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Branch	Client	Job Number	Section	Category	Code	Item Description	Quoted	Used	Pendi...	Plann...	Sche... Only
	=JarrettD 										
JarrettD	WKE-5	WKE-5	Stock	TUB	AHITUBL	Supertub Tub Lid Kit	3	0	0		
JarrettD	WKE-5	WKE-5	Stock	WC	CRMDUO'C	Caroma Duoset Cistern/COLOURED	6	0	0		
JarrettD	WKE-5	WKE-5	Stock	TAPS	CV123'CP	CV123x15mm Cavalier Basin Tap/CH	6	0	0		
JarrettD	WKE-5	WKE-5	Time	TProd	LP	Master Plumber	116.25	20.5	0		
JarrettD	WKE-5	WKE-5	Stock	WC	NOLECDF'...	Noel Easy Clean D/F Seat/WHITE	6	0	0		
JarrettD	WKE-5	WKE-5	Stock	WC	SNV'C	NZ S-trap Pan NV/COLOURED	6	0	0		
JarrettD	WKE-5	WKE-5	Stock	TUB	TCW560	560mm Sgle Wooden Tub Cabinet	3	0	0		
JarrettD	WKE-5	WKE-5	Plant	Plant	Trencher	Trenching Machine	0	13	0		
JarrettD	WKE-5	WKE-5	Stock	TUB	TUBLF2	560x450 S/S Fab Tub	3	0	0		

For that job only.

A link to a Nimbus Application means that when you click on any item in this column a Nimbus Application will open. The Application that opens depends on the report you are currently in. For example:

- If you are viewing the Job List report (located in the Enquiry menu), clicking an item held in the Description column will open the Nimbus Editor Application with the job pre-selected.
- If you are viewing the Resource List report (located in the Stock menu), clicking an item held in the Description column will open Nimbus Editor Application with that item pre-selected. Note: This is a dynamic link (see below) and a different form will open according to whether the item is inventory or non-stock.

Dynamic Links

Some report links are dynamic links. This means they will open different reports, or open different applications according to the data in the report. For example, clicking on the PO Number in the PO Invoices report opens the Purchase Order Application to enable a Creditor's invoice to be entered. Where the original order was an Overhead Order, the dynamic link opens the Invoice Overhead order form. Where the original order was for a Job, the dynamic link opens the Invoice JobStock Orders form.

It is important for you to familiarise yourself with the links as they will enable you to work more productively.

The links are able to be configured specifically for your site to enable further efficiencies.

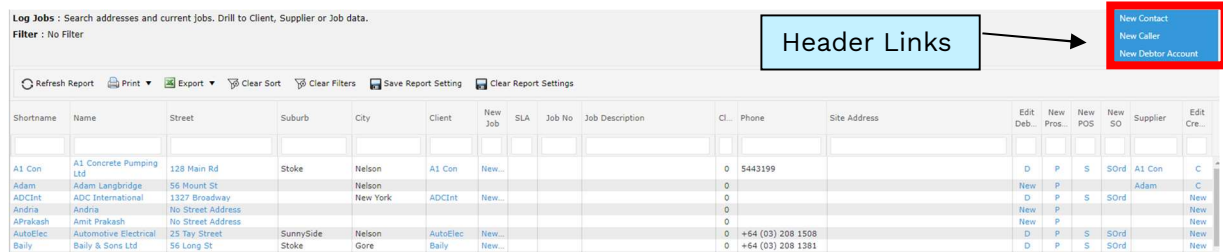
USER TIPS:

If a report has a **Description** or **Name** column in it, and the column is blue, the column will usually link to a Nimbus Application which allows you to edit the data.

If a report has a Number or Amount column in it, and the column is blue, the column will usually link to another report that drills to more detail.

Header Links

Many reports have another type of link available to users. These are Header Links. They are located at the top right hand of the screen and they may link to another Web Report OR a Nimbus Application.



Log Jobs : Search addresses and current jobs. Drill to Client, Supplier or Job data.
Filter : No Filter

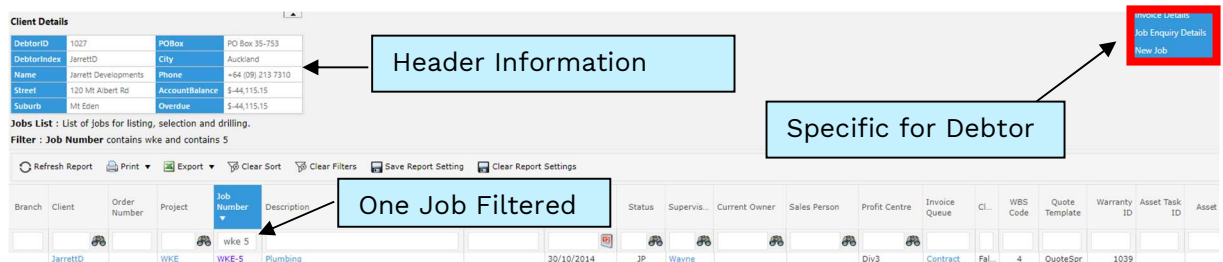
Header Links

- New Contact
- New Caller
- New Debtor Account

Shortname	Name	Street	Suburb	City	Client	New Job	SLA	Job No	Job Description	Cl.	Phone	Site Address	Edit Deb.	New Pros.	New POG	New SO	Supplier	Edit Cre.
A1 Con	A1 Concrete Pumping Ltd	128 Main Rd	Stoke	Nelson	A1 Con	New...				0	5443199		D	P	S	SOrd	A1 Con	C
Adam	Adam Langbridge	56 Mount St		Nelson	ADCInt	New...				0			New	P	S	SOrd	Adam	New
ADCInt	ADC International	1327 Broadway		New York	ADCInt	New...				0			New	P	S	SOrd		New
Andria	Andria	No Street Address				New...				0			New	P	S	SOrd		New
APRakash	Amr Prakash	No Street Address				New...				0			New	P	S	SOrd		New
AutoElec	Automotive Electrical	25 Tay Street	SunnySide	Nelson	AutoElec	New...				0	+64 (03) 208 1508		D	P	S	SOrd		New
Baily	Baily & Sons Ltd	56 Long St	Stoke	Gore	Baily	New...				0	+64 (03) 208 1381		D	P	S	SOrd		New

Some header links appear all of the time. Other header links appear when the report is filtered in a certain way resulting in additional Header Information being displayed. This Header Information can then be used by Header Links. When Header Information is displayed, additional Header Links that use this information may appear.

In the example below, one job has been filtered in the Job List from the Enquiry menu. Client Header Information is now shown for one client, and this means that when clicking on the Header Links, the client information can be passed through to the Nimbus Application.



Client Details

DebtorID	1027	POBox	PO Box 35-753
DebtorIndex	JarrettID	City	Auckland
Name	Jarrett Developments	Phone	+64 (09) 213 7310
Street	120 Mt Albert Rd	AccountBalance	\$-44,115.15
Suburb	Mt Eden	Overdue	\$-44,115.15

Jobs List : List of Jobs for listing, selection and drilling.
Filter : Job Number contains wke and contains 5

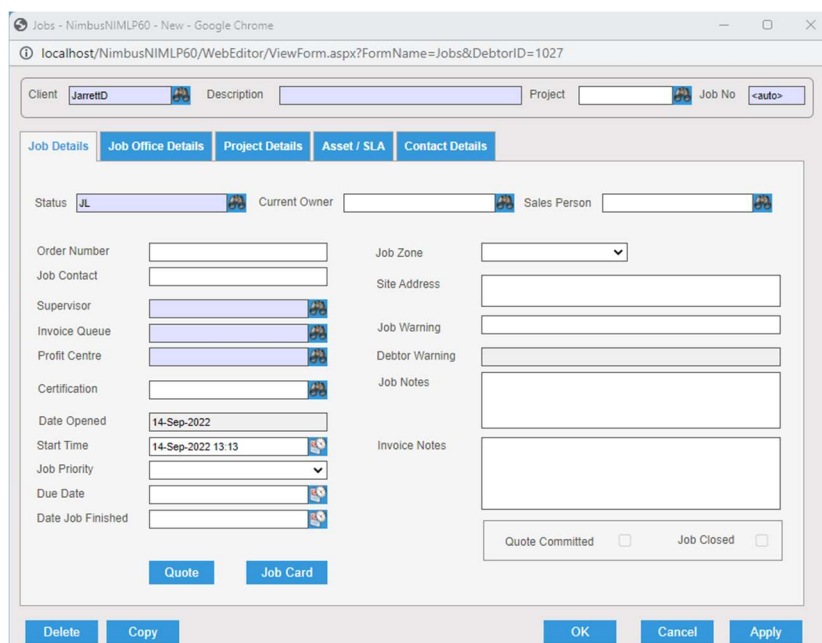
Header Information

Specific for Debtor

One Job Filtered

Branch	Client	Order Number	Project	Job Number	Description	Status	Supervis...	Current Owner	Sales Person	Profit Centre	Invoice Queue	CL	WBS Code	Quote Template	Warranty ID	Asset Task ID	Asset
	JarrettID		WKE	wke 5	Plumbing					Div3	Contract	Fal...	4	QuoteSpr	1039		

Clicking on **New Job** will open the Nimbus Editor Application with the Client already chosen.



Jobs - NimbusNIMLP60 - New - Google Chrome

localhost/NimbusNIMLP60/WebEditor/ViewForm.aspx?FormName=Jobs&DebtorID=1027

Client: JarrettID Description: Project: Job No: <auto>

Job Details | Job Office Details | Project Details | Asset / SLA | Contact Details

Status: JL Current Owner: Sales Person:

Order Number: Job Contact: Supervisor: Invoice Queue: Profit Centre: Certification: Date Opened: 14-Sep-2022 Start Time: 14-Sep-2022 13:13 Job Priority: Due Date: Date Job Finished:

Job Zone: Site Address: Job Warning: Debtor Warning: Job Notes: Invoice Notes:

Quote Committed: Job Closed:

Quote Job Card

Delete Copy OK Cancel Apply

Other Navigation Techniques

A menu item or a link created in a report can be set to open up a Nimbus Application. When this is the case, a new set of tools and techniques are available to help you find information more quickly.

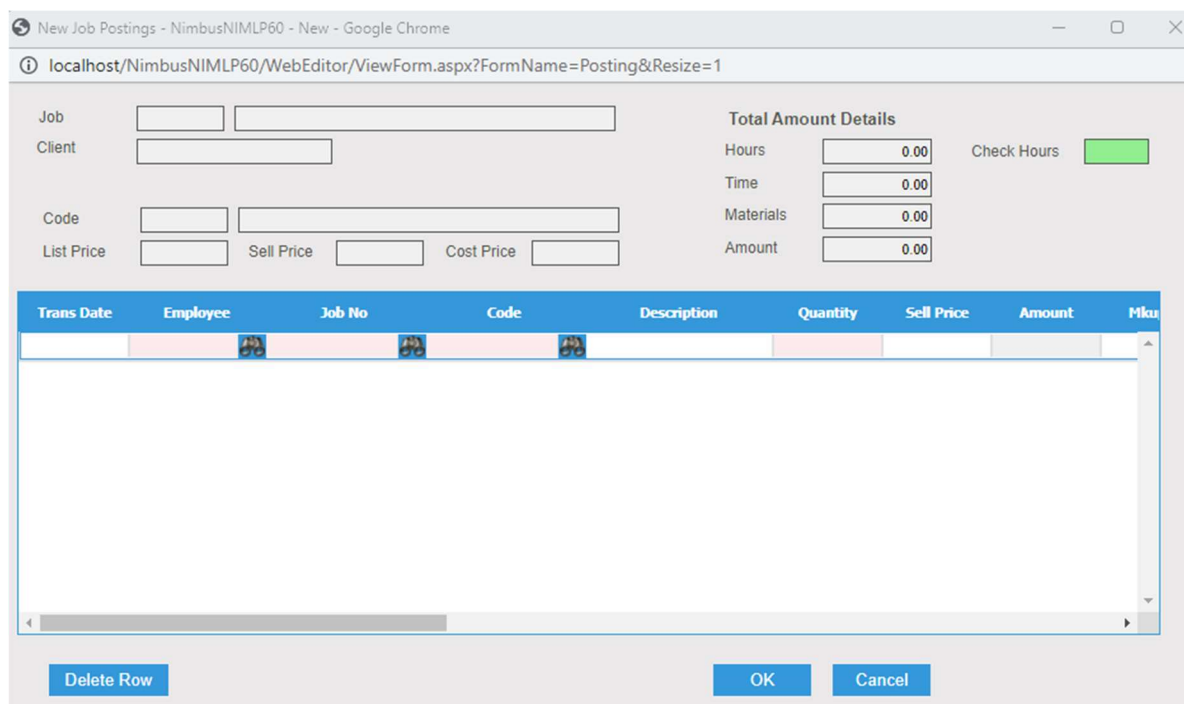
A ‘lookup’ is effectively a list of records to choose from when you don’t know the exact record details.

For example,

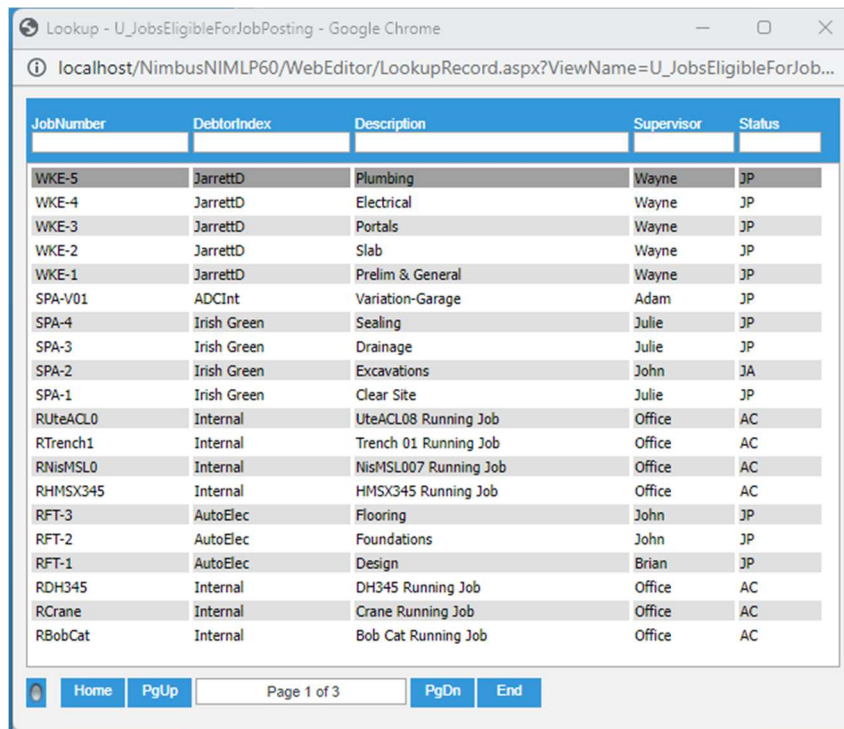
- When selecting a job, the lookup will be a list of jobs.
- When selecting a stock record, the lookup will be a list of stock records ... and so on.

To view the lookups available from within the Job Posting Application:


1. From the **Jobflow** menu, click on the **Job Posting** menu item. Accept the given selections in the first screen and then click the **OK** button to run the Nimbus Job Posting application.



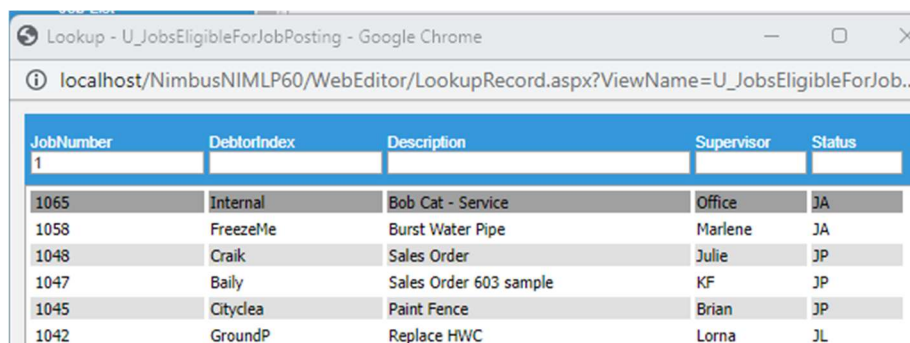
Select the cell underneath the Job No. column heading in the grid and ‘dot-tab’, i.e. press the full-stop key and then the Tab key. Because you were in the Job No. column, the ‘dot-tab’ technique causes the Job Lookup to appear so that searching for a job number can begin by utilizing the filters at the top of the screen. Had you entered a recognised Job number, the lookup would not have appeared because the search function would not have been necessary. Search for the job by using one of the column filters in the same way you would filter a report e.g. Typing maintain lathe in the Description filter would find the “Lathe Maintain Job”.



JobNumber	DebtorIndex	Description	Supervisor	Status
WKE-5	JarrettD	Plumbing	Wayne	JP
WKE-4	JarrettD	Electrical	Wayne	JP
WKE-3	JarrettD	Portals	Wayne	JP
WKE-2	JarrettD	Slab	Wayne	JP
WKE-1	JarrettD	Prelim & General	Wayne	JP
SPA-V01	ADCInt	Variation-Garage	Adam	JP
SPA-4	Irish Green	Sealing	Julie	JP
SPA-3	Irish Green	Drainage	Julie	JP
SPA-2	Irish Green	Excavations	John	JA
SPA-1	Irish Green	Clear Site	Julie	JP
RUteACL0	Internal	UteACL08 Running Job	Office	AC
RTrench1	Internal	Trench 01 Running Job	Office	AC
RNisMSL0	Internal	NisMSL007 Running Job	Office	AC
RHMSX345	Internal	HMSX345 Running Job	Office	AC
RFT-3	AutoElec	Flooring	John	JP
RFT-2	AutoElec	Foundations	John	JP
RFT-1	AutoElec	Design	Brian	JP
RDH345	Internal	DH345 Running Job	Office	AC
RCrane	Internal	Crane Running Job	Office	AC
RBobCat	Internal	Bob Cat Running Job	Office	AC

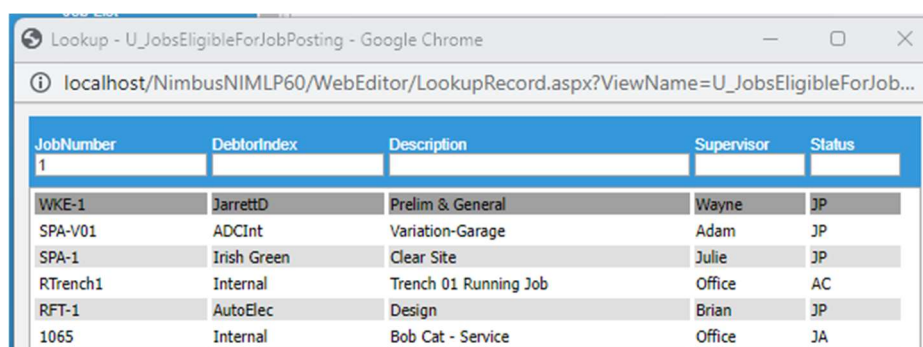
Note: The  icon is a toggle switch that enables you to search the first column (Job Number) by 'begins with' or 'contains'

e.g. begins with '1'



JobNumber	DebtorIndex	Description	Supervisor	Status
1				
1065	Internal	Bob Cat - Service	Office	JA
1058	FreezeMe	Burst Water Pipe	Marlene	JA
1048	Craik	Sales Order	Julie	JP
1047	Baily	Sales Order 603 sample	KF	JP
1045	Cityclea	Paint Fence	Brian	JP
1042	GroundP	Replace HWC	Lorna	JL

e.g. contains '1'



JobNumber	DebtorIndex	Description	Supervisor	Status
1				
WKE-1	JarrettD	Prelim & General	Wayne	JP
SPA-V01	ADCInt	Variation-Garage	Adam	JP
SPA-1	Irish Green	Clear Site	Julie	JP
RTrench1	Internal	Trench 01 Running Job	Office	AC
RFT-1	AutoElec	Design	Brian	JP
1065	Internal	Bob Cat - Service	Office	JA

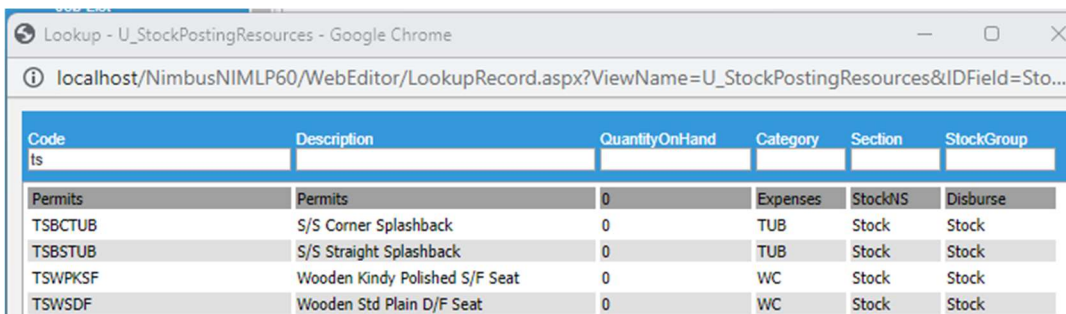
Select a job by double-clicking on it; this action closes the lookup and inserts the selected job number into the **Job** field.

2. Click the Cancel button to close the Job Posting application. Do not save changes.

While the 'dot-tab' technique will always bring up an appropriate lookup in fields where this is set up, the technique itself can be altered to improve your efficiency.

There are other ways to use Lookups in the Job Posting application:

1. From the **Jobflow** menu, click on the **Job Posting** menu item. Accept the given selections in the first screen and then click the **OK** button to run the Nimbus Job Posting Application.
2. Select the cell underneath the Code column heading, enter t in this cell and then press Tab. Because you did not enter enough recognised information, the Code Lookup appears, only this time you arrive at the section of codes that contain 't'. By entering some of the known code information you have accelerated the searching process.
3. Click the **Exit** button to return to the Job Posting Application.
4. Enter 'ts' in the cell underneath the Code column heading and then press **Tab**. Again, because you did not enter enough recognised information, the Code Lookup appears, only this time you arrive at the section of codes that contain 'ts'. By entering more of the known code information you have again accelerated the searching process. Select the TSBSTUB code by double-clicking on it; this action closes the lookup and enters the TSBSTUB code directly in the **Code** field.



Code	Description	QuantityOnHand	Category	Section	StockGroup
ts					
Permits	Permits	0	Expenses	StockNS	Disburse
TSBCTUB	S/S Corner Splashback	0	TUB	Stock	Stock
TSBSTUB	S/S Straight Splashback	0	TUB	Stock	Stock
TSWPKSF	Wooden Kindy Polished S/F Seat	0	WC	Stock	Stock
TSWSDF	Wooden Std Plain D/F Seat	0	WC	Stock	Stock

Similarly, if you know the description of the item, you could type splash straight in the description field and filter to the item.

5. Click the Cancel button to close the job form. Do not save changes.

Buttons on Forms

Most Nimbus editor forms will have the following buttons:



The **New** button will open the edit form ready for a new entity, eg new stock code, or new job etc

The **Copy** button relates specifically to the form you are using.

- The **Copy** button will copy some of the existing details held in the fields on the form into a new form. Using this button saves users from entering the same information.

The **Open** button will start a look up window allowing you to search existing items for you to choose the item you wish to edit the details of, or copy from.

The **OK** and **Apply** buttons save data entered in the fields on the form.

- The **OK** button will save the data and close the form.
- The **Apply** button will save the data but keep the form open for further use.

The **Cancel** button closes the form without saving any data held on the form or any changes made.

Job Cost Page

From the **JobFlow** menu, click on the **Job Cost Page** menu item.

This action opens job cost information which provides an interface for viewing and editing time, expenses and stock that relate to a job.

Details																				Edit Job		
JobID	1750	Suburb	Mt Eden																		Add Stock	
JobNumber	WKE-5	City	Auckland																		Add Time	
JobDescription	Plumbing	Phone	+64 (09) 213 7310																		Add Expenses	
Invoice-Queue	Contract	StartTime	30/10/2014 2:03:00 pm																		Add Plant	
Final Invoice	N	Quoted	\$11,639.97																		Transfers	
Scheduled Trans	Y	Costed Cost	\$1,562.50																		Returns	
JobSupervisor	Wayne	Pending Cost	\$0.00																		Current Orders	
ProjectName	New Workshop	Costed Amount	\$2,504.13																		Commit Scheduled Trans	
Name	Jarrett Developments	Pending Amount	\$0.00																			
Address	120 Mt Albert Rd	Invoiced Amount	\$0.00																			
Job Cost Page : Job Enquiry for all transactions crossstabbed																						
Filter : No Filter																						
Job Number WKE-5																						
<input type="button" value="Refresh Report"/> <input type="button" value="Print"/> <input type="button" value="Export"/> <input type="button" value="Clear Sort"/> <input type="button" value="Clear Filters"/> <input type="button" value="Save Report Setting"/> <input type="button" value="Clear Report Settings"/>																						
Period	Trans Date	Empl.	SubSection	Stock Code	Code Description	Sch. Only	Pland Qty	Qty	Quote Cost	Quote Amount	Pending Cost	Pending Amount	Costed Cost	Costed Amount	Invoice Amount	Mkup	Suble.	Section	Trans Status	Trans Notes	Ref Num	Del Trans
31/10/20	30/10/20	-	QuotingStock	AHHTUBL	Supertub Tub Lid Kit			3	\$75.00	\$93.75						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingStock	TCW560	560mm Sgle Wooden Tub Cabinet			3	\$204.00	\$255.00						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingStock	TUBLF2	560x450 S/S Fab Tub			3	\$275.40	\$344.25						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingStock	SNVC	1/2 S-Trap Pan NV/COLOURED			6	\$840.00	\$1,050.00						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingStock	NOLECDF	Noel Easy Clean D/F Seat/WHITE			6	\$194.82	\$243.53						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingStock	CRMDUO'C	Caroma DuoSet Cistern/COLOURED			6	\$1,147.00	\$1,434.00						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingStock	CV123'CP	CV123x15mm Cavalier Basin Tap/CH			6	\$228.00	\$285.00						25.00%	Quoti...	Stock	Normal		1	
31/10/20	30/10/20	-	QuotingTime	LP	Master Plumber			8.25	\$402.19	\$563.06						39.99%	Quoti...	Time	Normal		1	
31/10/20	30/10/20	-	QuotingTime	LP	Master Plumber			108	\$5,265.00	\$7,371.00						40.00%	Quoti...	Time	Normal		1	
31/01/20	08/01/20	John	CostingTime	LP	Master Plumber			5.5					\$192.50	\$375.38		95.00%	Costi...	Time	Normal		1	
31/01/20	09/01/20	John	CostingTime	LP	Master Plumber			7					\$245.00	\$477.75		95.00%	Costi...	Time	Normal		1	
31/01/20	09/01/20	John	CostingPlant	LP	Trenching Machine			6					\$390.00	\$510.00		30.76%	Costi...	Plant	Normal		1	
31/01/20	10/01/20	John	CostingTime	LP	Master Plumber			8					\$360.00	\$546.00		95.00%	Costi...	Time	Normal		1	
31/01/20	10/01/20	John	CostingPlant	LP	Trenching Machine			7					\$455.00	\$595.00		30.76%	Costi...	Plant	Normal		1	
									0	1...	\$8,6...	\$11,...	\$0.00	\$0.00	\$1,5...	\$2,5...	\$0.00					

Note: The Job Cost Page can also be opened directly from Column Links or Header Links on Job Reports.

It displays:

1. The **Job Details** – Job Number, Description, Client, etc.
2. The current **Invoice Queue** for this job.
3. Where applicable, the quoted amounts for this job.
4. The total value of any purchases on order for this job; showing as Pending Cost/Amount.
5. The amount that has been invoiced for this job.
6. **Transaction** details posted to this job already.

7. Real-time total values are displayed at the bottom of the Job Cost Page.
8. The header links allow you to edit the job; add stock/time/expenses; transfer/return items; commit time

