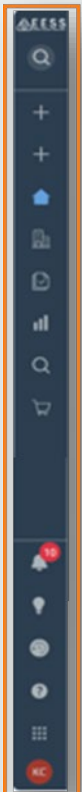
A Learning Guide

Finding your way round the EESS platform

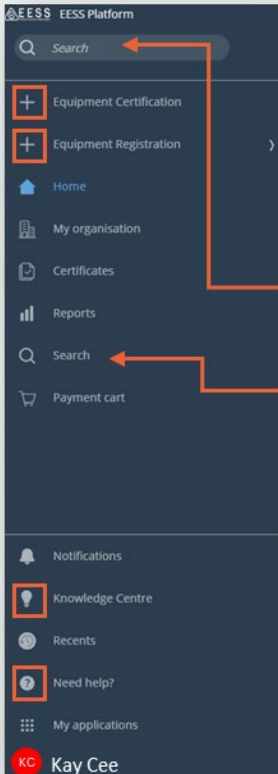
EESS Electrical Equipment Safety System

❶ Navigation

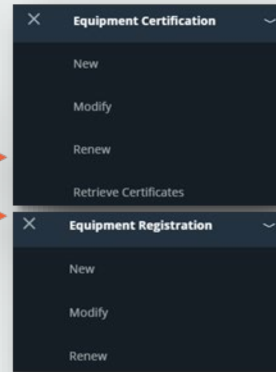


Menu options are displayed in a simple navigation bar to the left of the screen

Pointing your mouse anywhere in that area will expand the menu bar to provide more details about the options



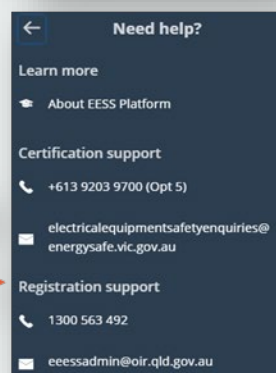
Click on the + sign to list the options available



2 search options:

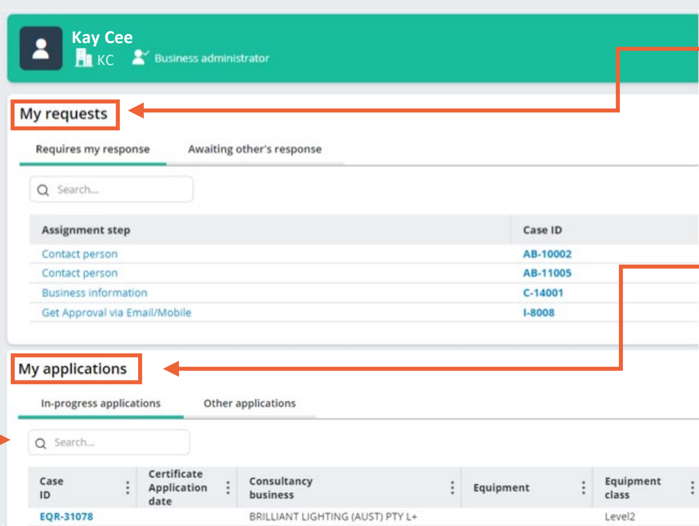
- top search to look for anything
- lower search icon to find a specific certificate or registration

Click on 💡 or ❓ to connect to more information or help



❷ Your workspace

Select the 🏠 Home icon from Navigation to go to your workspace. This is where you can keep track of your activities



My Requests

Lists all your requests you have made, such as inviting a team member, and you are waiting for a response

My Applications

Lists all your applications requests, that is 'cases' (such as new certifications or registrations) that are 'work-in-progress'

Search

Use the Case ID (see page 4 for more information) to find work in progress

❷ Your organisation, team and work allocated

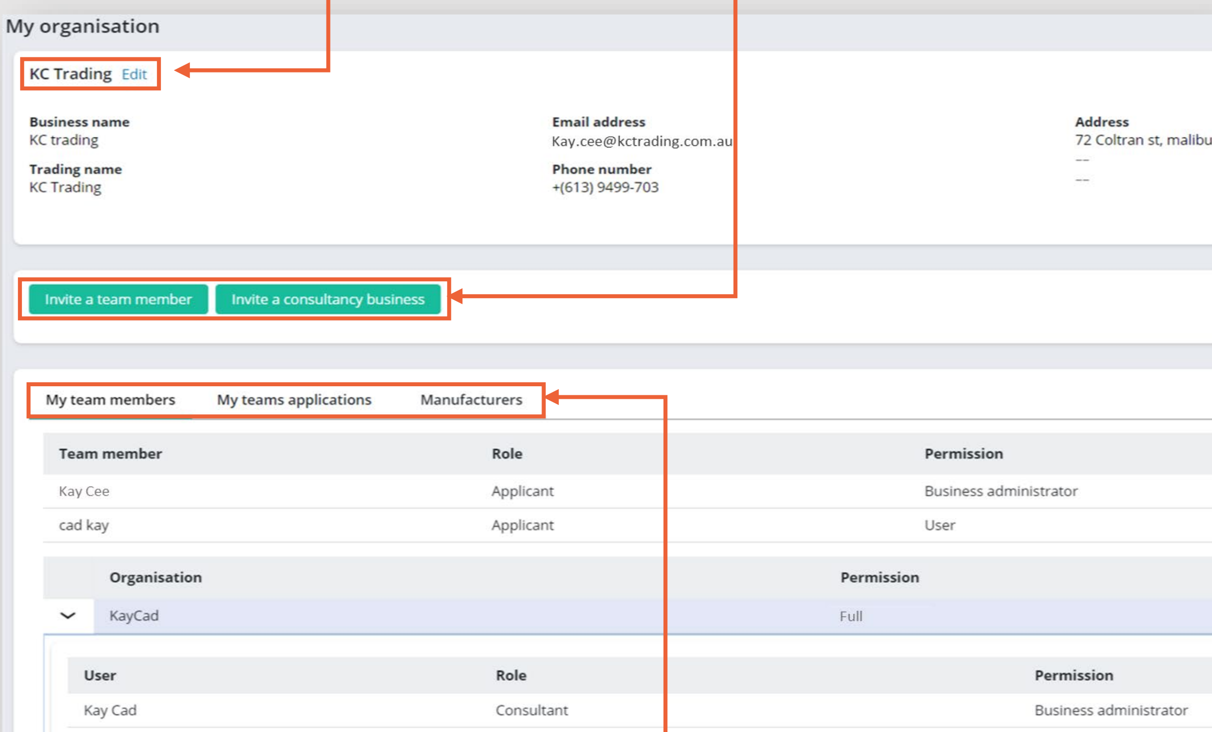
Select My Organisation from Navigation to see your organization's details and your team members.

Depending on the role type and permissions a user has will depend on what you as the user can do (see the Quick Reference Guide - Role Types and Permissions).

For example, as an Authorised Officer or Business Administrator for the organization, you can:

View and edit your organisation's details

Invite additional team members and consultancy businesses



Keep track of the:

- People connected to your organisation and their role permissions
- Applications each team member is working on
- Manufacturers connected to your organization and can be edited here

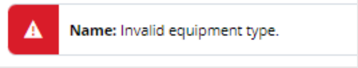
3 Instructions and symbols

Different types of instructions and messaging will be displayed in coloured banners to guide and inform

Information	providing knowledge and supporting instruction
Success	message notifying action complete
Error	indication data entry or action needs fixing
Warning	requiring your particular attention

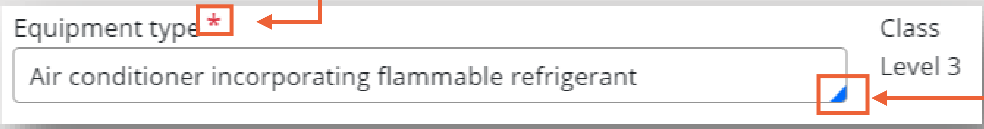
There are a variety of symbols connected to data fields and instructions to provide options or additional help:

A warning sign, alerting you to an error in a field



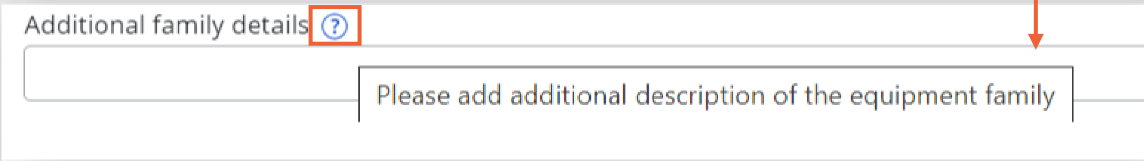
The red asterisk indicates a mandatory field

Indicates an auto-population field. Type the first few letters and select from the options



Select from options in drop-down

Hovering over this symbol will provide a tooltip



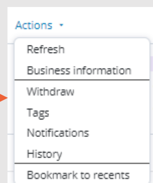
Click through to further action

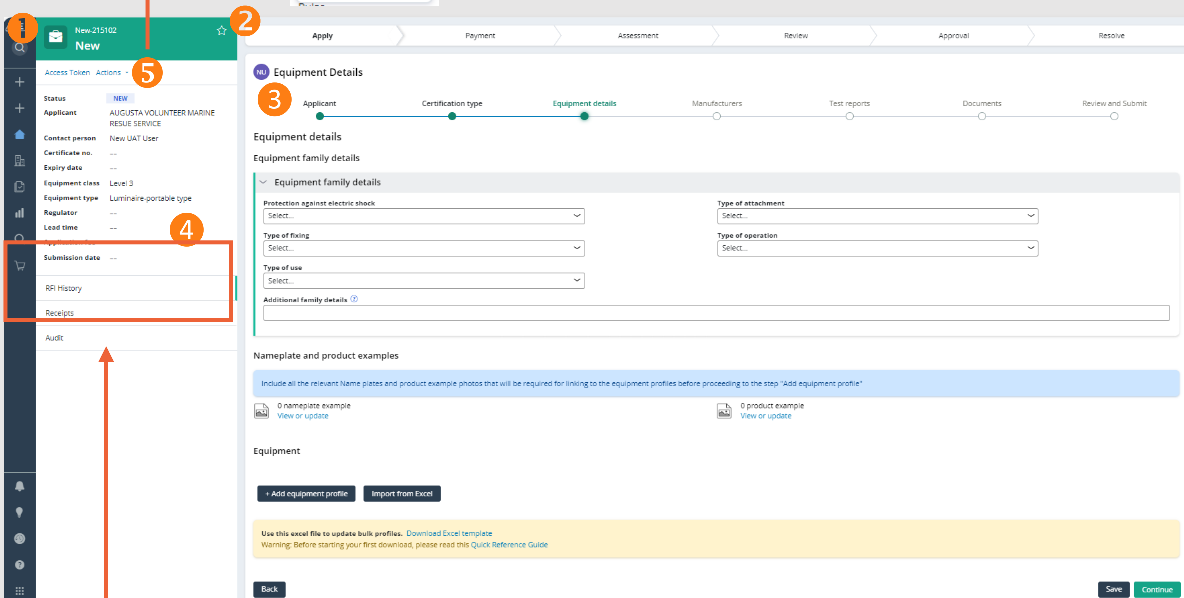
4 Managing your workflow

Case Lifecycle

When you begin an activity for a Certificate or Equipment (such as new, modify, renew), the platform creates a 'Case'

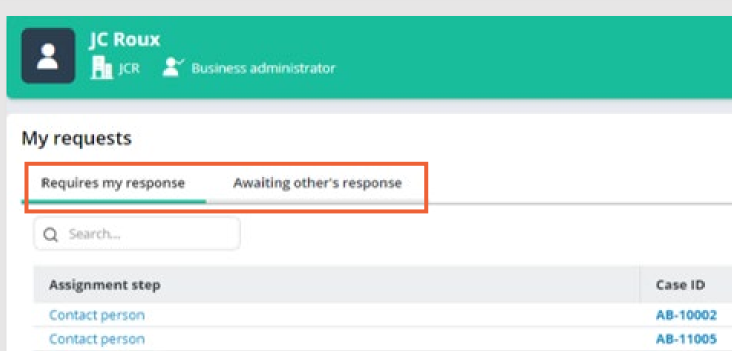
1. When you start a case, the platform allocates a Case ID
2. The chevrons at the top of the screen show the process or lifecycle of the case. Clicking on a process step will show you the subprocess steps
3. The 'breadcrumbs' will indicate where you are in the workflow
4. The Case Panel will provide a summary of the data you have captured so far and also indicate the case progress
5. Actions – the drop down provides additional actions such as reviewing Notifications and Withdrawing (see next page for more on this) or transferring a case. The options available will depend on the case





Tabs

Tabs will take you to different pages requiring different actions or more data



If you start an activity such as a new equipment registration and then discover you need to start again, you will not be able to modify this case, but you can 'Withdraw' it.

To Withdraw a case

- Select Withdraw from the drop-down list under Actions
- Provide the reason for the withdrawal in the space provided, for example:

  'entered in error' or 'duplicate'
- Click on the Submit button

NOTE: once you Submit, the case will not be retrievable