Bennett and Francis

Client Access Web Site
User Manual

by James Worrell, Bennett & Francis Surveys

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Aims and Scope of the Document

This document is designed to assist external users in the use of the Client Access component of the **www.bfsurveys.com.au** web site.

Background

Surveying has always been an industry that is keen to adopt new technologies. As one of the oldest professions in the civilised world, we have seen measuring technologies progress from manual tape measures to highly advanced and precise global position systems.

This yearning for progress is not only employed in our measuring procedures, but also in our filing, data storage and management systems.

Bennett and Francis have a complete "digital office". When an instruction is received from a client, right through to the final delivery of the job, every step of the way is recorded digitally in our systems.

You too can leverage this with 24x7 access to most documents and data we have for all of your historical and current instructions with us.

We started our digital data capture of all of our records a little over a decade ago, even digitising our earliest plans from the very early 1900's. So even if you haven't had any recent jobs with us, chances are we can get you access to plans we produced from right throughout the 20th century.

Our latest systems use large back end servers and web technology to deliver all of our information to end users.

Getting Started

To access our Client Access web site you will need a few things:

♦ An **Internet** connection;

♦ Internet (www) **browsing software**: the latest version of Internet Explorer or similar;

♦ Additional software: many of our documents are made available as Adobe PDF documents. You will need Adobe **Acrobat Reader** (or equivalent) to view these documents.

With all of this now in place, start your Internet connection and browsing software and proceed to our web site: www.bfsurveys.com.au

From there you can navigate to the encrypted Client Access area of the site. The direct link however is www.bfsurveys.com.au/ClientAccess/

Logging In

You should currently have a login screen similar to the following:
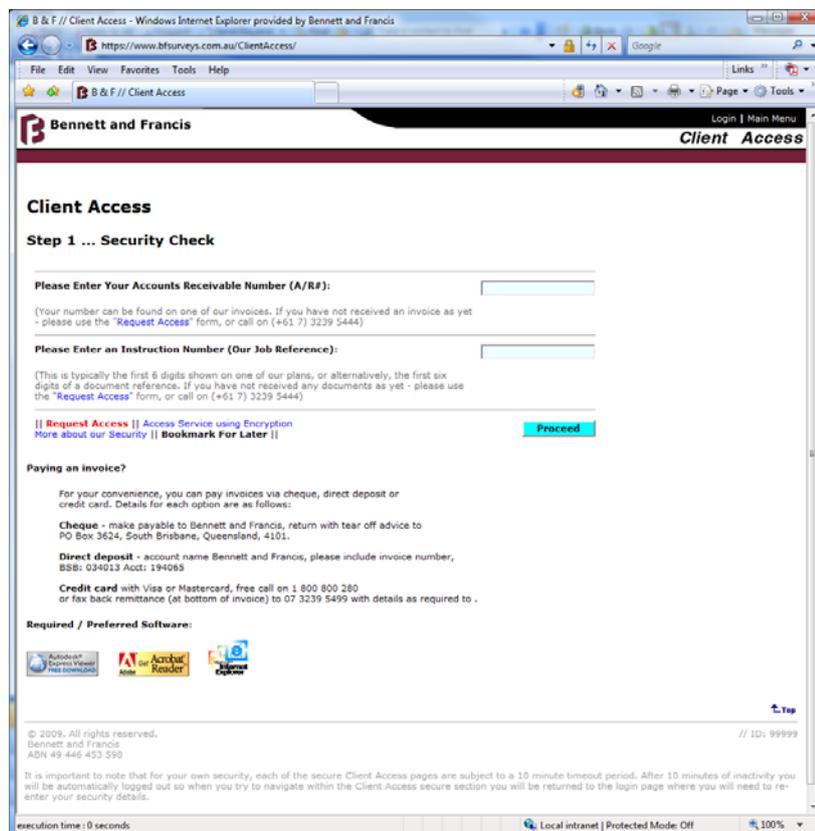
Figure 1. Client Access "Login Screen"

To proceed, you will now need to enter your user credentials. There are two numbers required. The first number is our client id we have for you. The second number is any instruction number for your entity.

If you do not know these numbers, you can make a request for them online, by phone (+61 7 3239 5444) or via e-mail.

Enter your user credentials and click "Proceed" and you will be presented with the Main Menu for Client Access.
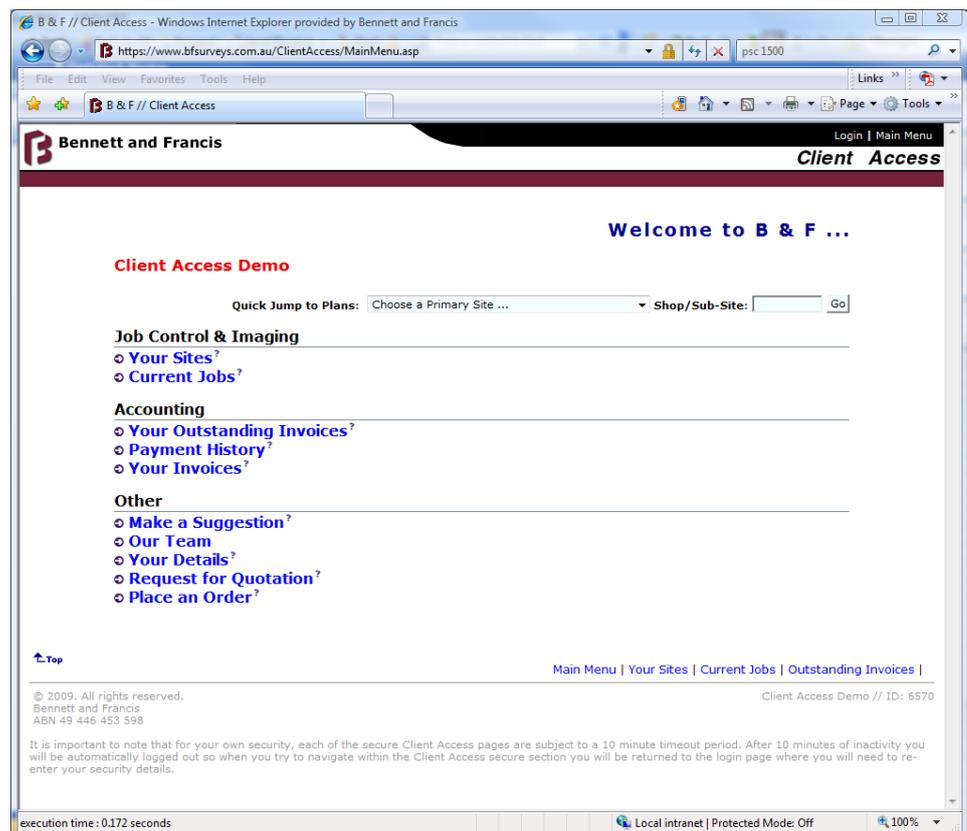
*Figure 2. Client Access "Main Menu"*

You're in! What Now?

Main Menu

The Main Menu (see Figure 2) is the central screen of the application. You can return to this screen at any time with either of the Main Menu links at the top and bottom of all screens.

You now have several options. If this is your first time logging in, why not check that we have your contact details correct? Or you can proceed straight to your plans! The following guidance will help you get the most out of the application.

How Is Data Organised?

All resources are "indexed" or group by their location. We call these locations "**Sites**".

As some sites are very large, we also have the facility to further group resources into "**Sub-Sites**". A good example of this would be a large shopping centre, whereby the primary site is the overall centre.

Depending on the complexity of the centre, we then have one or more layers of sub-sites, say "Level 1", or perhaps a precinct. Beyond this "layer", typically we will have individual shops. So conceptually, resources are organised into a "**tree structure**" with each location or site with a root, branches (eg floors) and leaves (eg individual shops or offices). Naturally simple sites don't require this structure and will be a single location.

Instructions, or jobs, are then "attached" to the locations that they are about or cover. We may also create one or more jobs depending on the type of work being done.

Documents and plans are then done for an instruction.

Because of this structure, you can find and access a document or plan either via site or instruction.

How Is Data Secured?

You will only be able to access resources that "belong" to you. Access to a site is granted if you have an instruction on that site with us (or a parent site in the "tree", refer to the section on "How is Data Organised").

If you are a consultant and not the client on an instruction, you can also access resources on all the sites you are involved with us with.

Likewise, if you want a consultant to be able to get access to certain resources (eg your Solicitor or Architect), be sure to call us to organise access!

Finding a Site

There are a number of ways to access sites.

One of the simplest methods is to view a list of "Your Sites" (see Figure 3) by selecting the option from the Main Menu. You will be presented with a list of all applicable "root" or primary sites for your login.
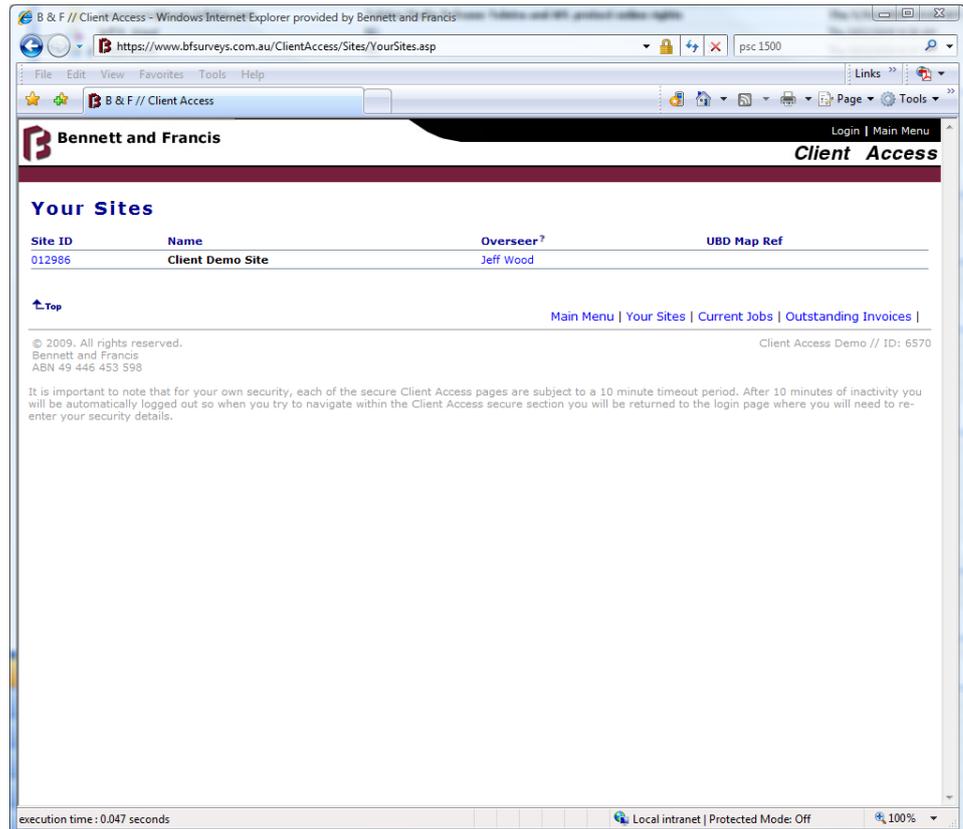

Figure 3. "Your Sites"

To access resources for a primary site, click on the Site Id number of the site you wish to access. This will take you to the "View Site" form (see Figure 4).

Remember, if you get **lost** at any time, you can simply return to the "Main Menu" and start over.
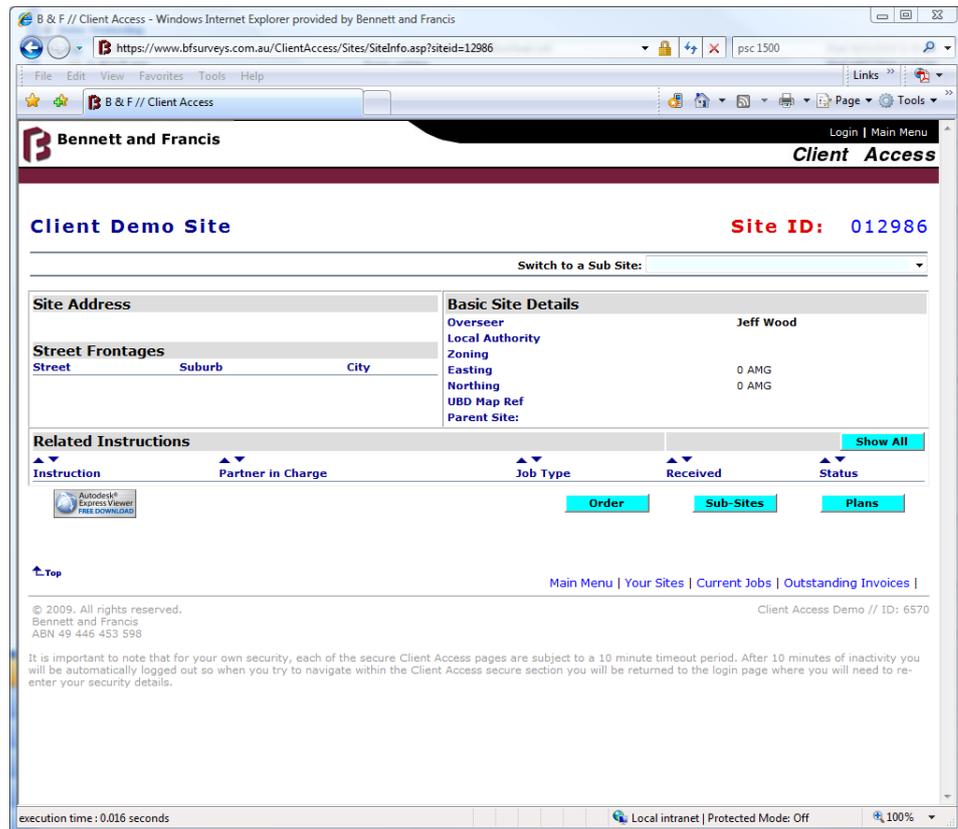
Figure 4. "View Site"

Resources and details about a site are accessible for the "View Site" form (see Figure 4). Do note that this could be a primary site within a site tree (see "How is Data Organised") and there **could be more sub-sites available**. To access sub-sites, either select a sub-site from the "Switch to a Sub Site" drop down, or click the "Sub-Sites" button at the bottom of the form.

Amongst the typical details about a site (eg address, zonings etc), if this is a sub-site, you will also see a link to the "**Parent Site**". Clicking on this link will navigate you up again in the sub-site tree.

Also on this form are any **active instructions**. To view all historical instructions, click the "Show All" button.

If you wish to order a new instruction on this site you can do so electronically via the "Order" form (see the section on "Placing an Order").

Finally, any plan resources available for a site can be accessed by clicking on the "Plans" button (see the section on "Downloading/Viewing a Plan").

Downloading/Viewing a Plan

Plans are the primary resource available in our Client Access web site.

You can access a plan either via a site or an instruction. In this section we will assume you have come via a site (or sub-site), however if you have come via an instruction (see the section on "Finding an Instruction"), the procedure if very similar.

Follow the procedure in the section on "Finding a Site" to get to the appropriate site you wish to view plans for. Once at this form (see Figure 4), select the "Plans" button to take you to the list of plans available for that site.

The screen you now should have will look similar to the following (see Figure 5)
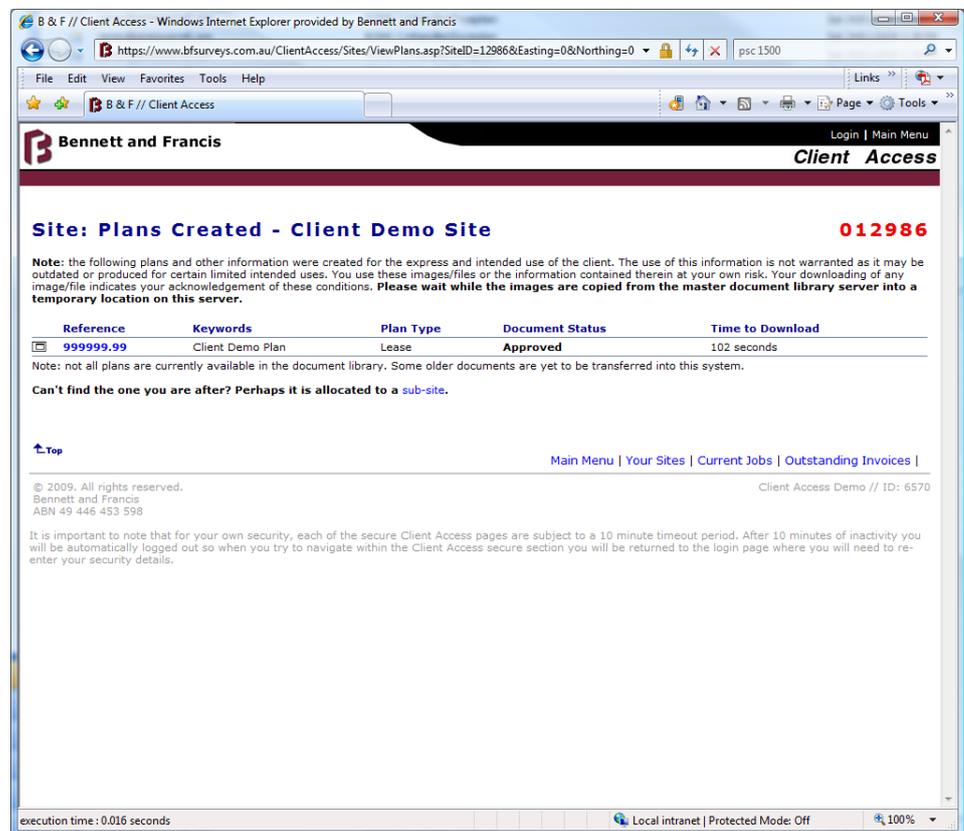
Figure 5. "Site: Plans Created"

You will hopefully now have a list of plans for a site to choose from. To download the one you want, simply click on the "box" icon next to the reference number for that plan. If you want to know more about a particular plan, you can also click on the reference number to take you to the "View Plan" form (see Figure 6).
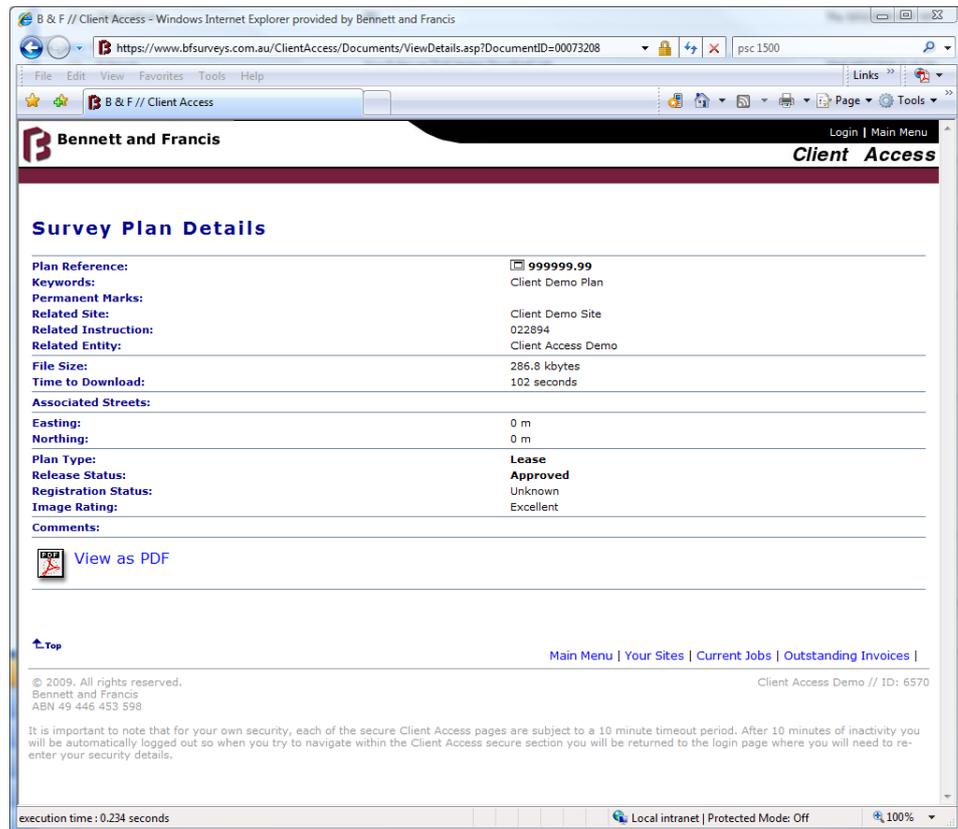
Figure 6. "View Plan"

Most plans in the system are in Adobe PDF format. To view this file type you will need Acrobat Reader. This can be downloaded for free from the [Adobe web site](#).

Some older images could be in a TIF format. There are various viewers for this file type, also available for free or built in to your operating system. Simply clicking on the download link should work, however if you have any issues, feel free to contact us for assistance (see the section on "Getting Assistance").

If the plan you are wanting is not in the list, it could be associated with a different site or sub-site, so please try your site list again. If you are still having troubles finding a particular plan, again, please contact us for assistance.

Quick Jumping to Plans

Some advanced users with many complex sites will want to jump to the plans for a "leaf" site, for example a given shop number within a complex.

You can do this too with a shortcut procedure, by using the "Quick Jump to Plans" function on the Main Menu. Simply choose the primary site and

enter a part of the sub-site name in the "Shop/Sub-Site" box and click "Go".

Quick Jump Example

Scenario: you are searching for plans for "Client Demo Site", specifically for "Client Demo Site Shop 123".

Step 1: select "Shopping Centre A" from the drop down box where by default "Choose a Primary Site …" is displayed.

Step 2: enter "123" in the "Shop/Sub-Site" box.

Step 3: the section of the screen should reflect something similar to the figure below (see Figure 7). **Click "Go"**.
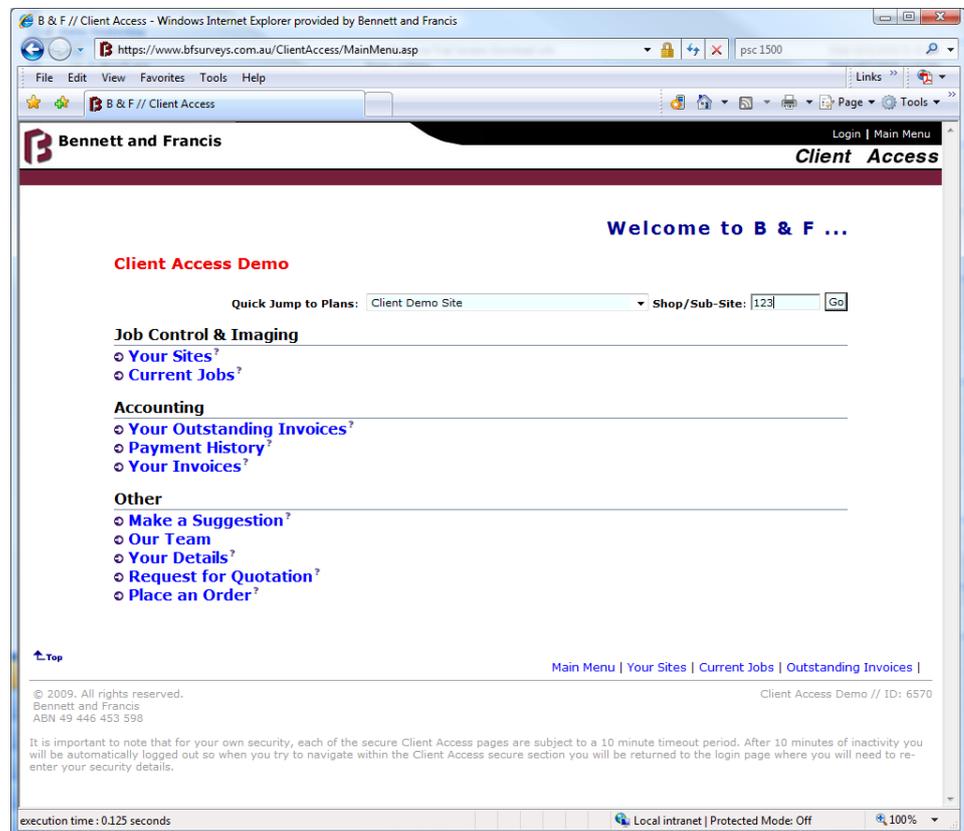
Figure 7. "Quick Jumping" to Plans

Results: if there is a matching site, you will be directed to the "Site: Plans Created" for that particular site. If the sub-site name you entered is not found, you will be directed to the "Site: Plans Created" for the "root" site you selected in the drop down box.

The "Site: Plans Created" screen will look similar to the following figure (Figure 8).
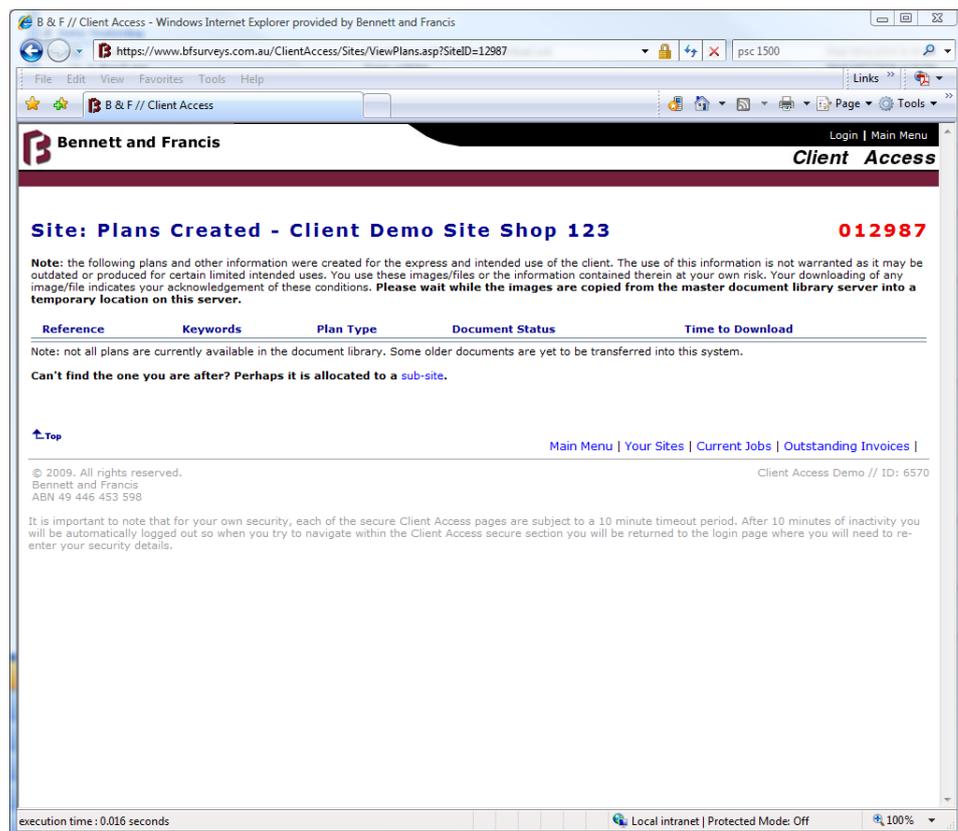
Figure 8. "Site: Plans Created"

Once you have your list of plans, you can then download the appropriate plan. See the section on "Downloading/Viewing a Plan" for assistance with this procedure.

Finding an Instruction

In the section "How is Data Organised" we introduced you the concepts of Sites and Instructions. We "index" our resources by both. An instruction is a discrete unit of work on a site.

You can see what **outstanding work** we are doing for you at any time by choosing the "Current Jobs" option from the "Main Menu" (see Figure 9).

Figure 9. List of Current Jobs

This can be a handy form to either check a job has been received and progressed or to get the **contact details of the partner in charge** of the instruction and so on.

Archived instructions are found via their site. See the section on "Finding a Site" for assistance with this, then click on the "Show All" button (see Figure 4) to view all instructions for a given site or sub-site.

To view further details about an instruction, click on the instruction number ("Our Id") for the appropriate instruction you wish to view. This form should be similar to that shown in Figure 10.
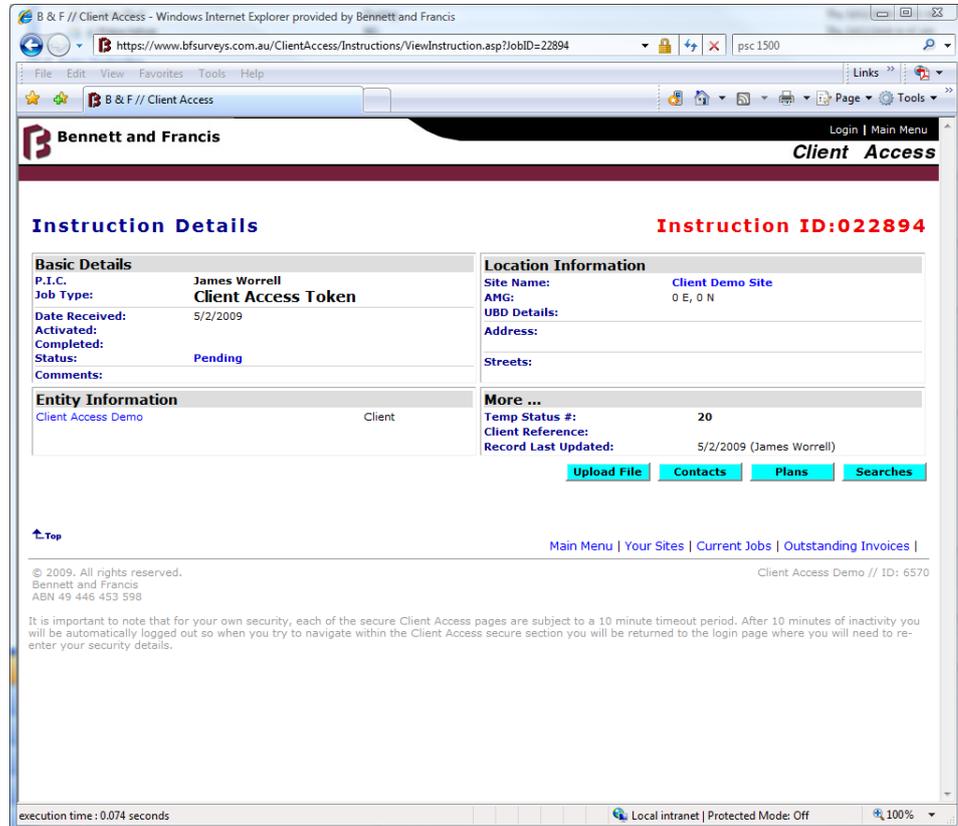
Figure 10. View Instruction details

Uploading a File

If you need to send us a file, chances are you can e-mail it. However, sometimes large files or e-mail systems may not be appropriate.

In this situation you can "send" us a file via the Upload function.

Step 1: Navigate to the appropriate instruction to which you wish to add your file (see the section on "Finding an Instruction") and select the "Upload File" button.

You will now have a screen similar to that in Figure 11.
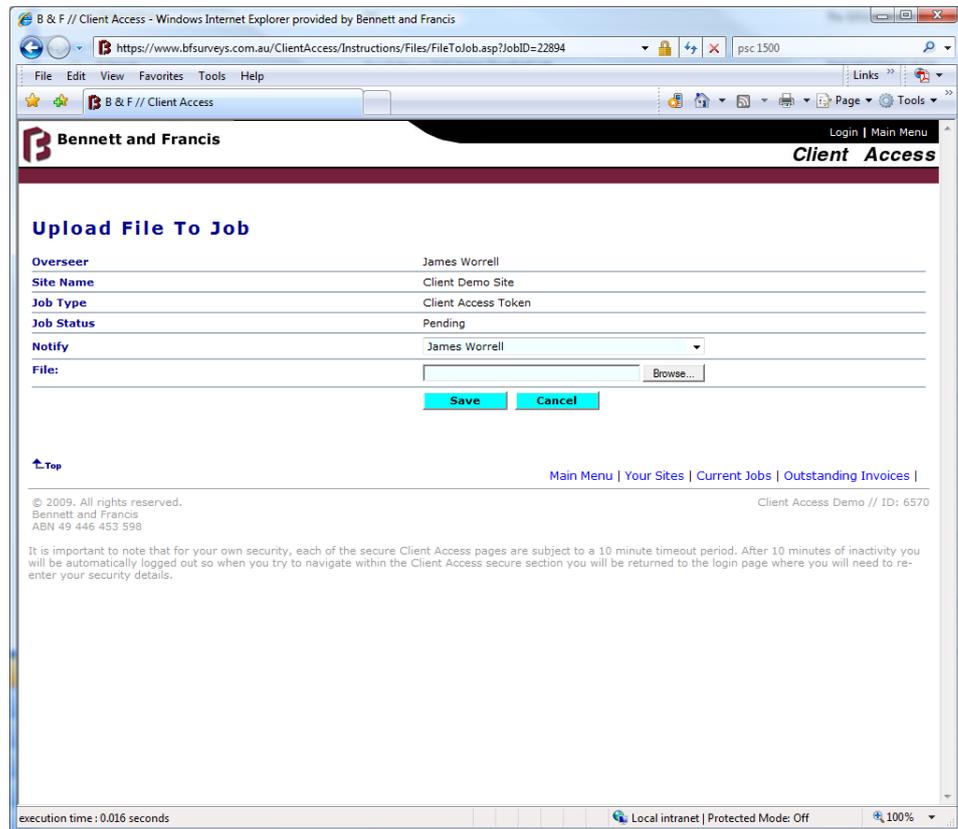
Figure 11. Uploading a file

Step 2: Now choose an employee to notify. This will send an automated e-mail to the user letting them know when you have successfully uploaded a file to an instruction.

Step 3: choose the file on your local system to upload by either typing in the full path and name of the file, or by choosing "Browse".

Step 4: click "Save". The browser will no begin to upload the file. Please wait as this process can take several minutes depending on the size of the file, speed of the Internet connection to our site and so on.

Once completed, you will be redirected back to the "View Instruction" form (see Figure 10).

All Contacts on an Instruction

Many instructions are carried out by a team of consultants. The list and contact details of all people that we have associated with an instruction are available via the "Contacts" button on the "View Instruction" form (see Figure 10).

Searches

Not all plans in the system are produced by us. Any plans purchased for an instruction are also available for reference via the "Searches" button on the "View Instruction" form (see Figure 10).

Placing an Order

To streamline our processes, you can also place an order online.

If this is for an existing site, navigate to the appropriate site or sub-site for the new work and select the "Order" button. You will be directed to the order form (see Figure 12).

Figure 12. Place an Order

Simply fill out the details as best as you current can and select the "Submit" button.

The order will then be directed to a member of our staff for processing.

If this order is for a new location or site, you can proceed straight to the "Order" form.

Request for Quotation

To submit a request for quotation at any time, chose the "Request for Quotation" option from the "Main Menu". Fill out the following form (see Figure 13) and "Submit".

A member of our staff will contact you as soon as possible with the quotation or further questions on the new work.

Figure 13. Request for Quotation

Changing Your Details

To ensure timely responses to queries, and so on, you can also assist us by keeping your contact details up-to-date.

In this section you can:

♦ Edit your personal address and contact details; or

♦ Add more staff.

Figure 14. Updating your details

To change your entities primary contact information, simply contact us. For your own details, choose your name from the ""Related Contact(s)" (see Figure 13) and then click "Modify". You will be able to update a range of details as per Figure 15.
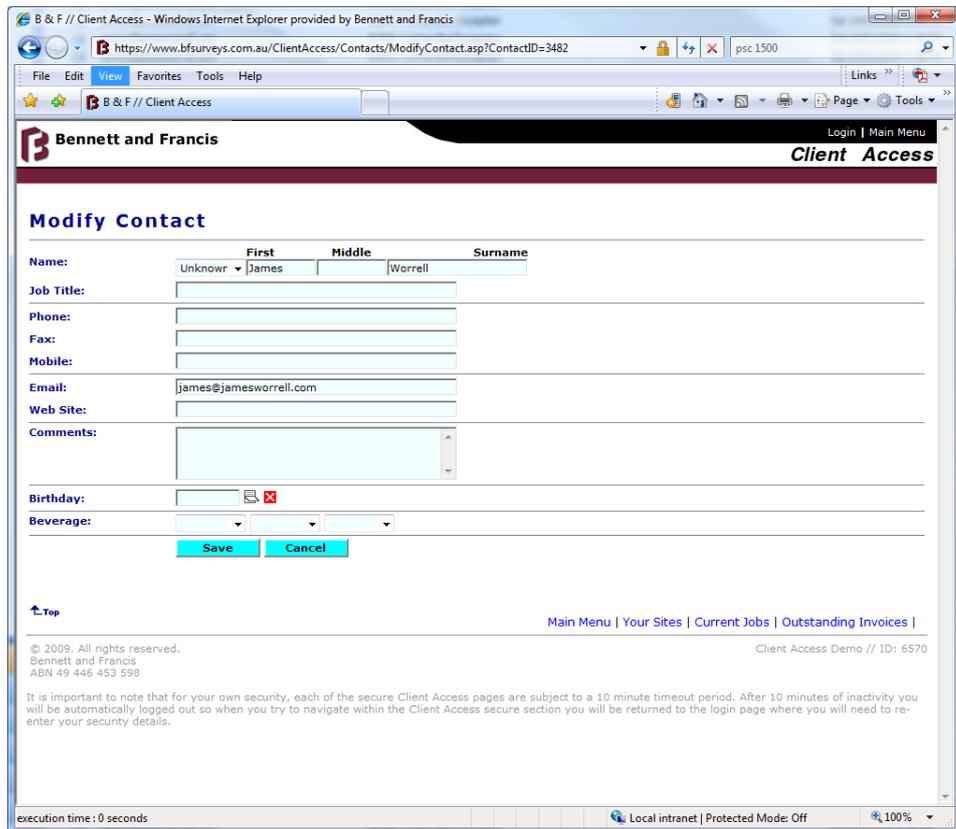
Figure 15. Modify your contact details.

Once saved, you will be redirected back to the "View Contact" form. To return to the primary entity choose the entity's identifier in the "Related Entities" section, or return to the "Main Menu".

To **add a new employee** to your list, chose the "Add New" list. The form and procedure is very similar to modifying an existing Contact.

If you wish to **delete** a contact, **contact us** and we will arrange to modify the database.

Our Staff and Contact Details

There is also a list of key staff and their contact details for your convenience. To access all contact details, click the "Our Team" option on the "Main Menu".

Accounting

For the administration staff in your office there are a number of resources with respect to our Accounts.

Under "Accounting" in the "Main Menu" you can access:

♦ A list of any outstanding invoices;

♦ Your full payment history; or

♦ Your full invoice history.

You can also download PDF **copies of invoices** and view how we have allocated payments against invoices and so. Details about making payments for outstanding invoices are also noted on the "Your Invoices" (see Figure 16) list.


Figure 16. Your invoices

Getting Assistance

We are always keen to lend a hand so please don't hesitate to contact us at any time with questions or suggestions.

Phone   +61 7 3239 5444

E-mail   mailbox@bfsurveys.com.au

Fax   +07 3239 5499

Suggestions?

We are always looking for ways to improve the site. Be sure to contact us at any time with suggestions on how we can change the site to make things easier or by adding more functionality.

Training

We are always also available for training. We can assist over the phone, or if you feel a bit of one-on-one time would be of benefit, don't hesitate to ask!