# FSE KNOWLEDGE BASE

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Zinier's Scheduling and Dispatching help coordinators intelligently assign schedule and dispatch tasks that have been added to a work order. We've broken down S&D into two distinct sub-categories. Task Scheduling contains the core features related to S&D (including manual scheduling) and field technician visibility (Such as the Calendar View). Automation groups features related to Scheduling Automation, including Tech Recommendations.

# Task Scheduling

## Overview

Scheduling & Dispatch lets you assign, schedule and dispatch the Tasks you add to a Work Order. Zinier Field Service Elements has a powerful Tech Recommendation engine that can assist you when scheduling and dispatching tasks. The engine can take in account multiple attributes and skill requirements when assigning a user to a specific type of task and location.

- Overview [4]
- View Tasks by Status [4]

## View Tasks by Status

View tasks grouped by status to quickly understand what needs your attention. Tasks are grouped by the following navigation tabs/modules:

### View Open Tasks

Where you schedule and assign tasks. This module contains tasks with the following statuses:

"Open" tasks have not yet be scheduled or assigned

"Scheduled" tasks have been assigned and scheduled but not yet dispatched, and not visible to a tech yet.

## View Dispatched Tasks

Where you can view dispatched tasks that are still in progress. This module contains tasks with the following statuses:

"Dispatched" tasks have been sent to the assigned tech and are viewable on the tech's mobile device. But the tech has yet to start/check-in to the site.

"In Progress" tasks are those where the tech has checked-in to the site



## View Tasks Pending Review

Where you can view tasks that have been submitted for review. This module contains tasks with the following statuses:

"Pending Review" tasks that have been completed in the field and submitted for review.

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"Site Change Request" tasks are submitted when a tech has discovered that the site address needs to be updated.



## View Closed Tasks

Where you can historical data on completed and cancelled tasks. This module contains tasks with the following statuses:

"Completed" tasks that have been completed, reviewed and approved.

"Cancelled" tasks are those that have been cancelled.



## View Work Order Details

View the full WO details associated with the task.

## View Site Details

View details about the Site to which the task is assigned including the contact person and location (map and address)

**View Services**

View the Services associated with the Task.



## Task Assignment

### Manual Task Assignment

Manually assign tasks to a single technician of your choice.

### Recall a Dispatched Task

Web users can recall a dispatched task if they need to reassign it to another tech or change the scheduled time, etc. Doing so will notify the assigned technician, remove the task from the tech's task list on the mobile app and move the task to the "Open" module with stats = "Open"

### Cancel a Task

Web users can cancel a task that is no longer needed. Doing so will notify the assigned technician, remove the task from the tech's task list and move the task to the "Closed" module with stats = "Cancelled"

### Delete a Task

In the event that a task is not longer valid, web users can delete it. Delete functionality is only available for Cancelled or Completed Tasks. Doing so will remove the task from all Task modules.

# Task Review

From the Pending Review module, reviewers can see tasks that have been completed in the filed and submitted for review. The Review side panel shows all of the data captured in the field as part of the task workflow (photo evidence, data captured in input fields, notes, customer signature etc.). From here the reviewer has the option to Approve or Reject a task.

## Approving Tasks

If a task is marked as "Approved" it will move to the Completed module with status = "Completed"

### Site Change Requests

If a technician arrives on site and finds the address of the customer site to be inaccurate, they may sub mit a Site Change Request to alert web users who can approve to auto-update the address of the cus tomer site or reject to dismiss the request.

### Corrective Maintenance Requests

If a technician has a task underway in the field but identifies additional corrective maintenance to be done, they can submit a Corrective Maintenance Request to web users in the back office. If approved, an additional Corrective Maintenance task is added to the Work Order that can be assigned to the same technician or another.

### Rejecting Tasks and Sending Back to the Same Tech

Reviewers have the option to reject a task and send it back to same technician with notes to correct any issues preventing the task from being approved, such as insufficient photo evidence or notes

### Rejecting Tasks and Re-opening for Assignment

Reviewers also have the the option to reject a task and re-open it for scheduling and re-assignment. Selecting this option changes the task status to "Reopened" and moves it to the Open module where it will need to be reassigned to another technician at a later date to correct issues preventing the task from being approved and completed.

### Providing Rejection Reasons and Notes

When rejecting a task, reviewers can select from a pre-defined list of rejection reasons as well optional ly provide additional notes.

**Managing Rejection**

Selecting the list of Rejection Reasons is done for each Task Type from Settings / Work Order Settings. The lists themselves can be created and edited in Settings / List Options.
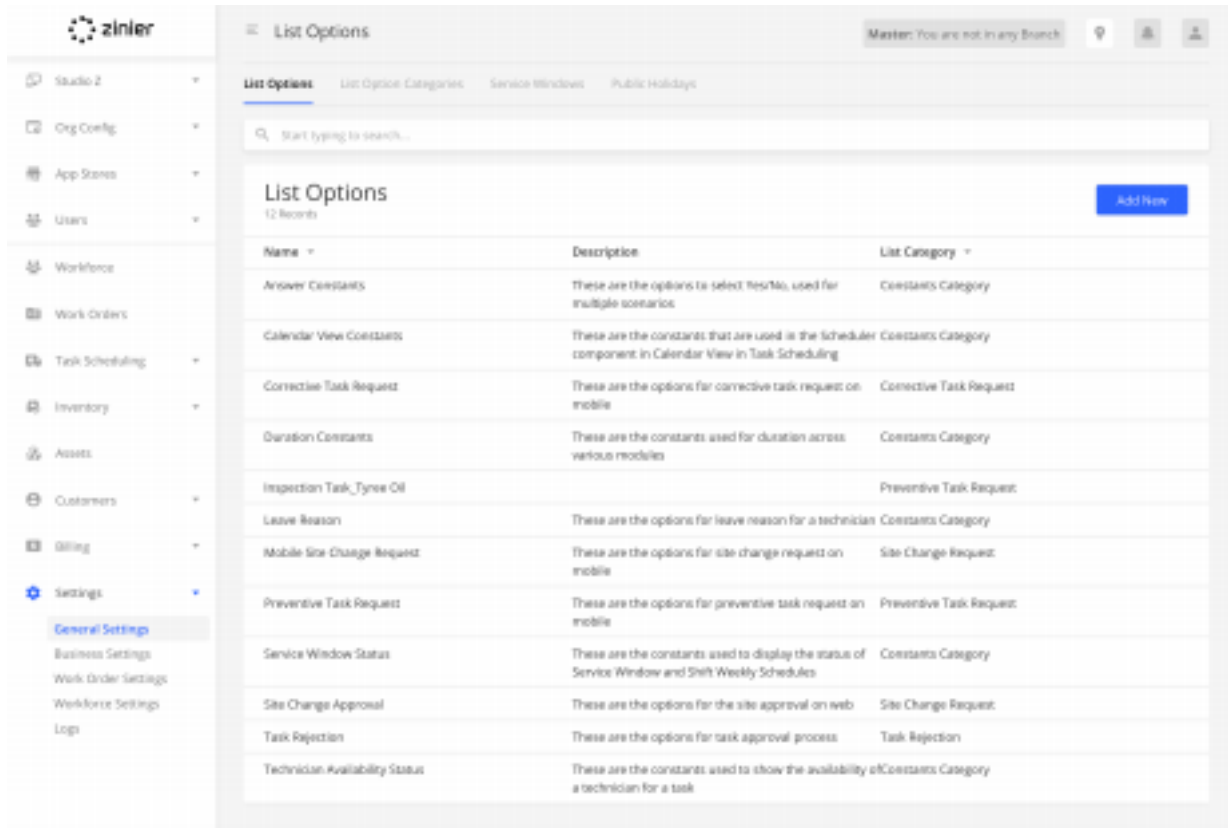


## Technician Calendar View

View the calendar / schedules of all technicians to better understand the availability on a daily, weekly and monthly basis.

### Filter the List of Techs

Filter technician list to see only selected technicians on the calendar.

### View Online/Offline Status of Techs

If a technician was not been active on the mobile app for the last 60 minutes, an "offline" icon will ap pear next to the name of the technician.

### Quick View of Task Details

View basic task details with a summary popup directly from the calendar. You can also view the full task details by clicking on a button from the pop-up.

### Dispatch a Tasks from the Calendar View

Quickly dispatch scheduled tasks directly from the popup that appears after clicking a task from the cal endar view.
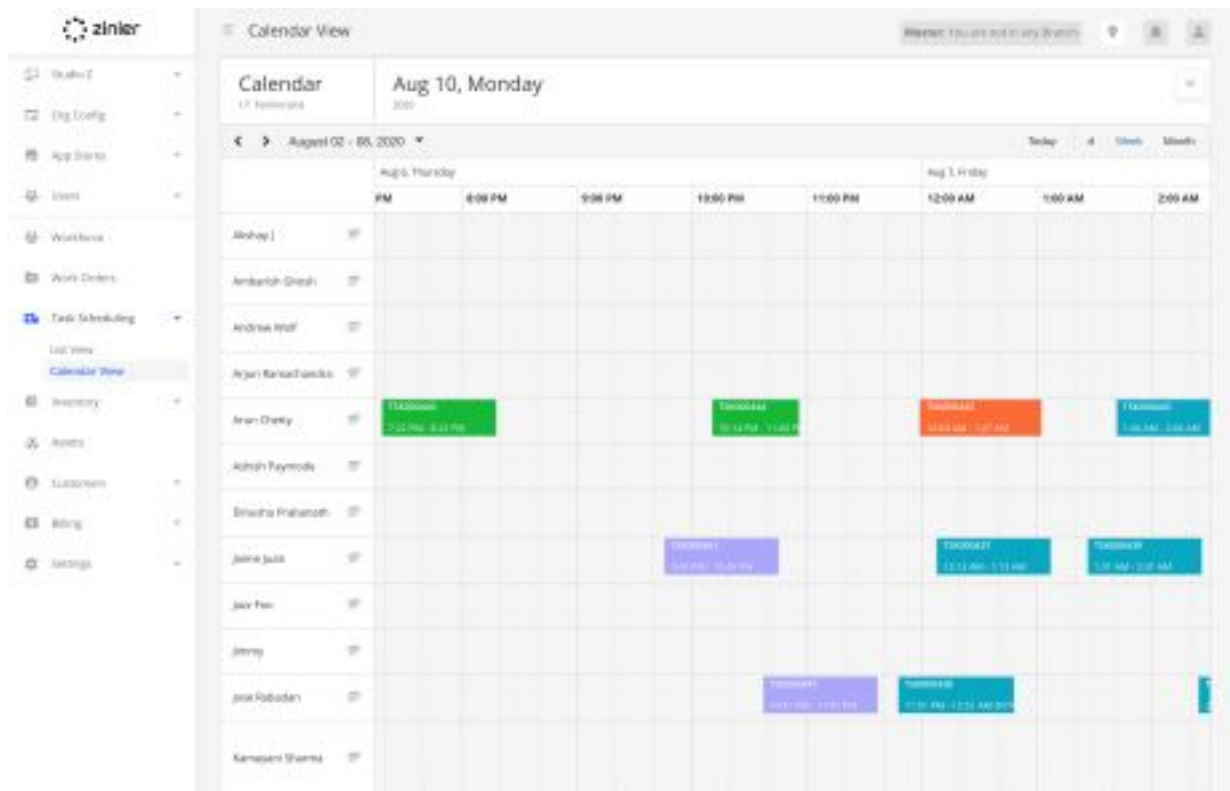
## Assign an Open Task to an Empty Time Slot

To improve the utilization rate of a tech, users can schedule a task by clicking on any empty time slot of a particular technician. After doing so, the user can select from a filtered list of Open Tasks to assign to the tech.

Calendar
17 Technicians

Aug 10, Monday
2020

‹ › August 09 - 15, 2020 ▾

Today    d    Week    Month

Aug 10, Monday

| | 11:00 AM | 12:00 PM | 1:00 PM | 2:00 PM | 3:00 PM | 4:00 PM | 5:00 PM | 6:00 |

Akshay J

Ambarish Ghosh

Andrew Wolf

Arjun Ramachandra

Arun Chetty

Ashish Paymode

Dinesha Prabasath

**Schedule Task**          ✕✖
For an empty time slot.

Start Time
10/05/2020, 03:00 PM

Open All Tasks
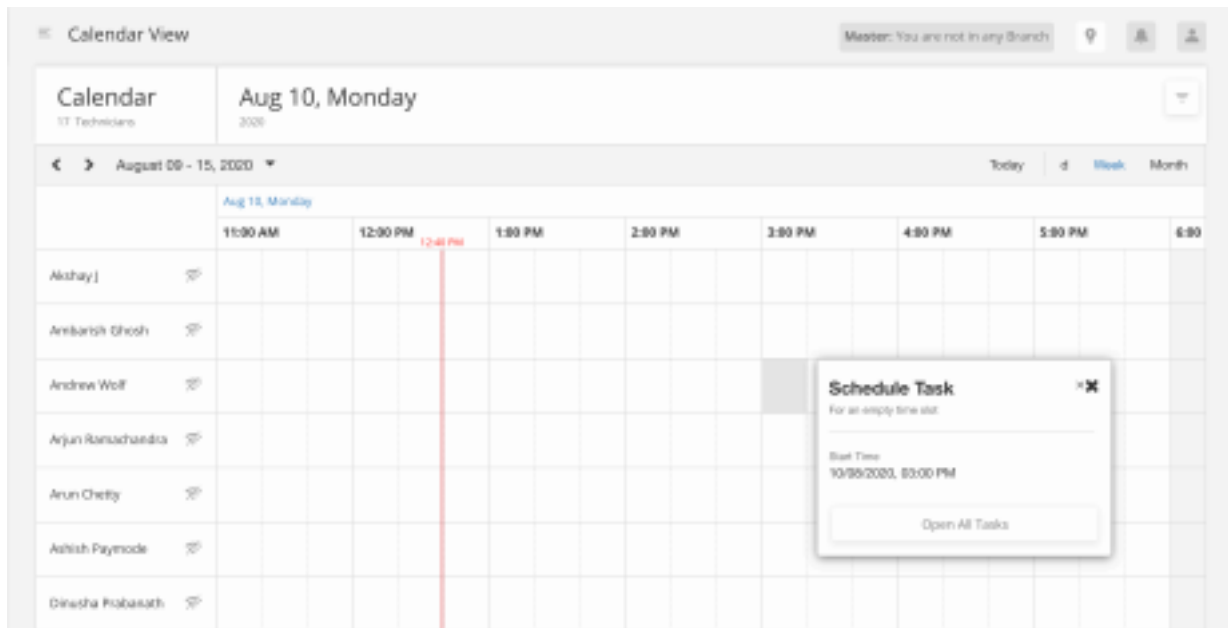
# Automation

## Overview

Automation comes into play when in a few different places in **Scheduling & Dispatching:** when man
ually assigning tasks, Dispatchers can choose to leverage the ISAC Tech Recommendation engine to

view a list of recommended techs. Dispatchers can also utilize the Tech Recommendation engine to au
tomate the process of scheduling and dispatching of multiple tasks. The Auto Scheduler users the same
Tech Recommendation logic defined above and configured from **Settings > Work Order Settings >
Scheduling Settings**.

## Technician Recommendation

When manually assigning tasks, you can choose to leverage the ISAC Tech Recommendation engine
to view a list of recommended techs. Technician Recommendations enable dispatchers to quickly as
sign individual tasks to the right technicians. The recommendation engine works by first filtering out
technicians that are not available and do not match the skills, region, proximity, and service window as
sociated with the task (the "Base Filters"). Next, the recommendation engine utilizes one of three pre
built Scheduling Optimization Methods that prioritize recommended technicians on the condition that's
most important to the dispatcher such as utilization rate, travel time, or experience. The Scheduling Op
timization Methods and base filter settings can be modified from the **Settings > Scheduling Settings**.

### "Base" Recommendation Filters

### Availability

Technicians must be available during the scheduled time of the task. "**Available**" is defined by:

• Within the technician's normal shift or during planned overtime
• No other tasks assigned to the technician
• Not on planned leave
• Not a public holiday

Techs that are not available are not shown in recommendation lists.

### Required Skills

Techs must have the required skills and skill levels associated with the task type. Techs without the required skills are not shown in recommendation lists. Admins can turn off this filter in Settings. If no skills are present for the Task, this filter is ignored and all technicians are eligible.

## Region

If a tech is associated with a Contractor, then the regions associated with the Contractor must include the region associated with the Customer Site where the task is being performed, otherwise, the technician is filtered out of the recommendations.

## Proximity

The tech must be within a predefined proximity.

• Technicians outside of the default proximity are filtered out.
• No tasks are assigned to a technician for the date of the task at hand: Proximity is determined by comparing the home base location of the tech to the location of the Customer Site. • Tasks have already been assigned for the date of the task: Proximity is calculated from the previous task's location to the one which is being scheduled.
• The task is set to commence within the next 90 minutes: Proximity will take into account the last known location of the tech.

Default Proximity is set in **Settings > Work Order Settings > Scheduler Settings**

### Scheduling Optimization Methods

When leveraging the Tech Recommendation engine and Auto Scheduler users can choose between the 3 pre-built Scheduling Optimization Methods that further constrain the list of recommended technicians. These optimization algorithms are listed in more detail in the Scheduling Settings section below.

## Auto Schedule Tasks

Dispatchers can also utilize the Tech Recommendation engine to automate the process of scheduling and dispatching of multiple tasks. The Auto Scheduler users the same Tech Recommendation logic de fined above and configured from **Settings > Work Order Settings > Scheduling Settings**.

### Filtering and Selecting Tasks to Auto Schedule

Before running the Auto Scheduler, users first have the option to select which tasks to Auto-Schedule based on the following set of filters:

*Filter Tasks by Time Frame:* Filter by tasks that are open or scheduled within a specified time frame (i.e. Today, the next 3 days, the next 7 days etc.).

*Filter Tasks by Region:* Filter tasks by one or more regions. Regions are associated with the customer site the task is assigned to. To see tasks for all regions, select **All Regions.**

*Filter Tasks by Task Type:* Filter by one or more task types. To see tasks for all task types, select **All Task Types**.

*Filter Tasks by Status:* Users can filter for tasks that are *Open* or *Open & Scheduled*.



### Previewing Selected Tasks to Auto Schedule

Before running the auto-scheduler, users will first see a list of the filtered tasks as outlined above.

Users then have the option of selecting which tasks from that list to auto-schedule.

# Auto Schedule Tasks

**Continue**  ✕

Filter Task for Auto Scheduling

### Time Frame

Within 4 days ▼

### Regions

BV-123 ✕  BV-ABC ✕  South ✕                      ✕ | ▼

### Task Types

Corrective Maintenance ✕                         ✕ | ▼

### Task Status

Open And Scheduled Tasks ▼

**Generate Task For Auto Scheduling**

Search

🔍 Start typing to search...

# Tasks for Auto Scheduling
15 Records
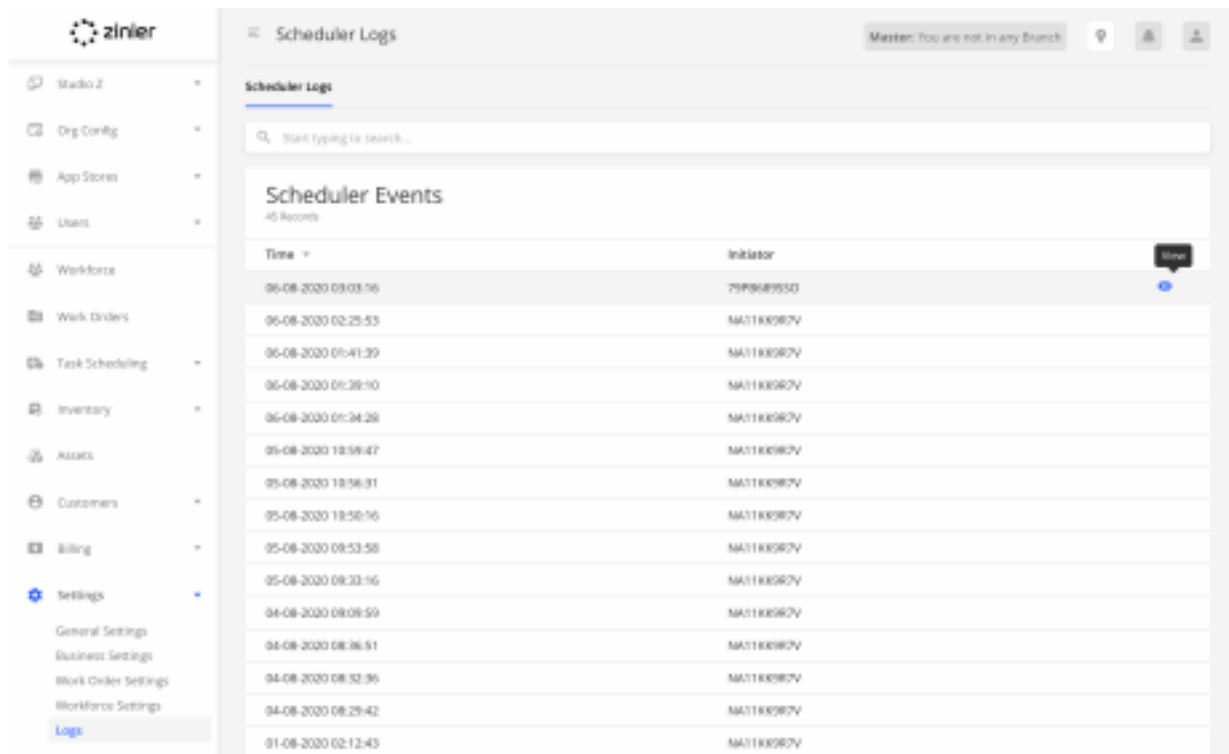
| ☑ | Task ID ▼ | Region ▼ | Task Type ▼ | Task Status ▼ |
|---|-----------|----------|-------------|---------------|
| ☑ | TSK000466 | BV-123 | Corrective Maintenance | Scheduled |
| ☑ | TSK000465 | BV-123 | Corrective Maintenance | Scheduled |
| ☑ | TSK000468 | BV-123 | Corrective Maintenance | Scheduled |
| ☑ | TSK000472 | BV-123 | Corrective Maintenance | Scheduled |
| ☑ | TSK000471 | BV-123 | Corrective Maintenance | Open |

**Logs**
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## View Auto Scheduling

Users can view a log of all tasks that have been Auto Scheduled from the Settings / Logs / Scheduling Logs module. This is useful when you want to identify and correct any scheduling issues.



## Scheduling Settings

The following settings allow you to configure different aspects of scheduling automation in the **Task Scheduling** module. These settings are used by the Tech Recommendation engine and Auto Scheduler.

### Use Skills (Yes / No)

When turned on, Techs must have the required skills and skill levels associated with the task type. Techs without the required skills are not shown in recommendation lists.

### Define the Minimum Proximity

Define a minimum distance between a technician's current location or base location and the task location (the location of the Customer Site associated with the task). Technicians outside of this range will be filtered out when running the Tech Recommendation.

### Select a Primary Optimization Method

When leveraging the Tech Recommendation engine and Auto Scheduler users can choose between the 3 pre-built Scheduling Optimization Methods that further constrain the list of recommended technicians. These optimization algorithms are listed in more detail below.

## Experience Score

This score reflects a combination of experience at the customer site, experience performing similar tasks, first-time fix rate, and skills.

## Utilization Rate

A weekly metric used to keep task load evenly balanced in your workforce. Technicians with lower utilization rates are prioritized to keep the distribution even.

## Predicted Travel Time

Estimated travel time between tasks or from the technician's base location. This figure is an estimate and can change depending on schedule adjustments, but gives you an idea of who may be in the area at the scheduled time of this task.

Back-Office Operations groups all other back-office related capabilities not related to mobile field service or scheduling and dispatching.

# Workforce Management (Users, Groups & Workforce)

## Overview

Users are managed in two different modules in FSE. User access is first managed in the Users module which allows admins to invited users to have access to Zinier and assign users to groups.

Once a user has access to Zinier, he/she can be added as a Technician and managed from the Workforce module.

## Users

Manage (invite, edit, and deactivate) the users in the organization. User records are first added to the system with the status "Pending Invite" so you can verify the information of the user is correct. Users can then be "Invited" to the org which sends an email invitation to the user with sign-up instructions. Once invited, users can then be added to the workforce.
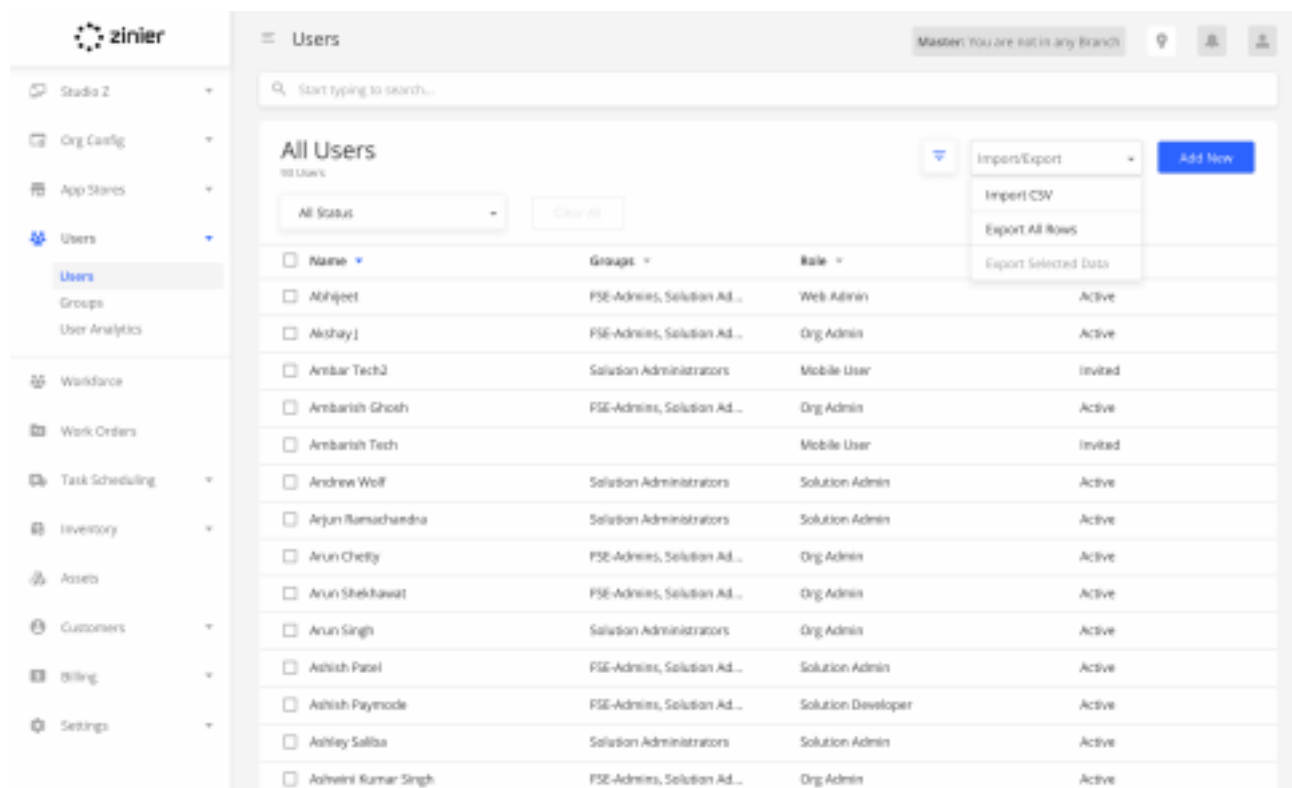


### Invite, Edit, and Deactivate

Manage (invite, edit, and deactivate) the users in the organization.

### Assign Roles to Users

Zinier has a number of pre-defined user roles that determine access rights in the platform (such as mo bile app vs. web app access).

### View User Statuses

View the status of a user in the system. Zinier users can have one of the following statuses:

*Draft:* User is created in Zinier but does not have access to the platform

*Invited:* User has application access, has received an invitation email, but has not finished setting up their account (i.e. has not accepted the invitation and set their password)

*Active:* Users become Active once they finish creating their account

*Deactivated:* The user is no longer able to access Zinier as an administrator has removed access. All of their data still remains in the system

### Bulk Upload Users

Admins have the option of bulk uploading a group of users using a CSV file.

## Assign Users to Groups

Add users to one or more Groups. Groups play several different roles in Zinier, including defining access to Mobile Projects, Web Projects, etc. Before a user can be assigned to a Group, it must first be created in the Users / Groups module.

## Groups

Manage (add and edit) Groups in the organization. Once added, Users can then be assigned to one or more Groups from the Users module.
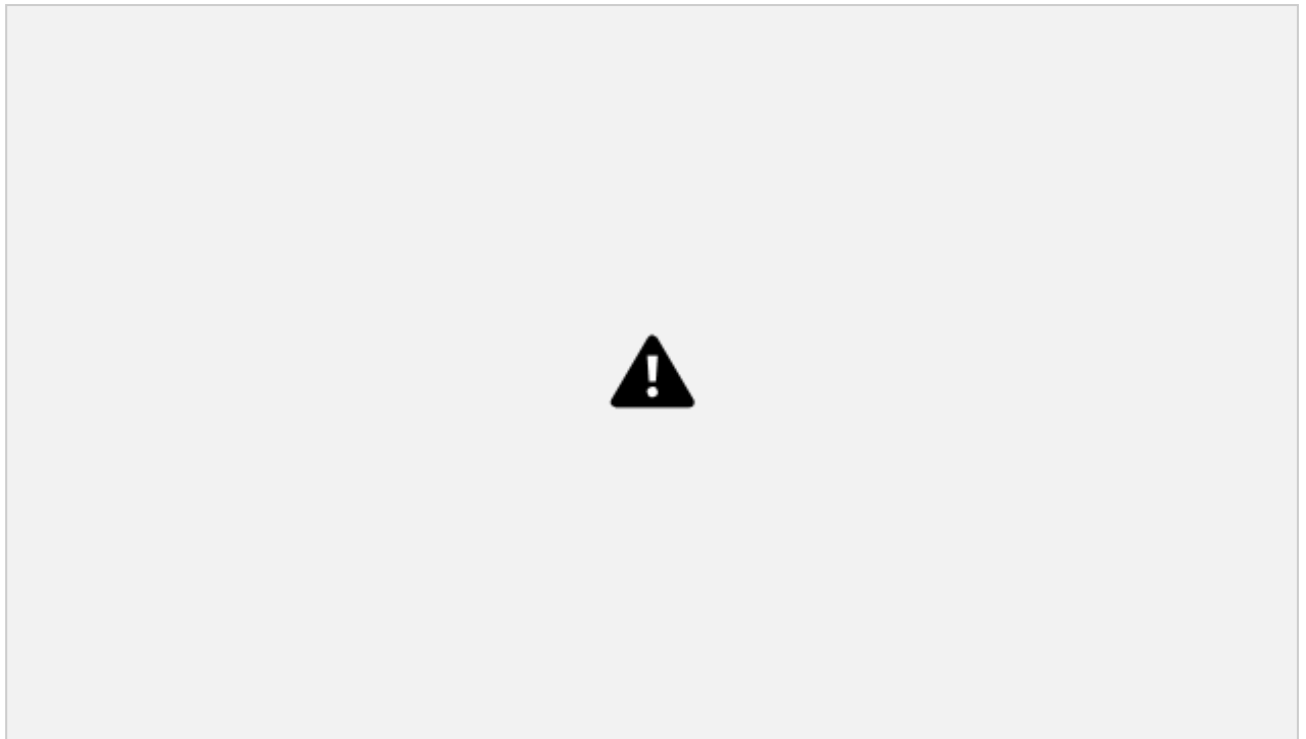
## Manage Groups

Manage (add and edit) Groups in the organization. Groups can be assigned a group email addressed, used when email notifications are sent to the group.
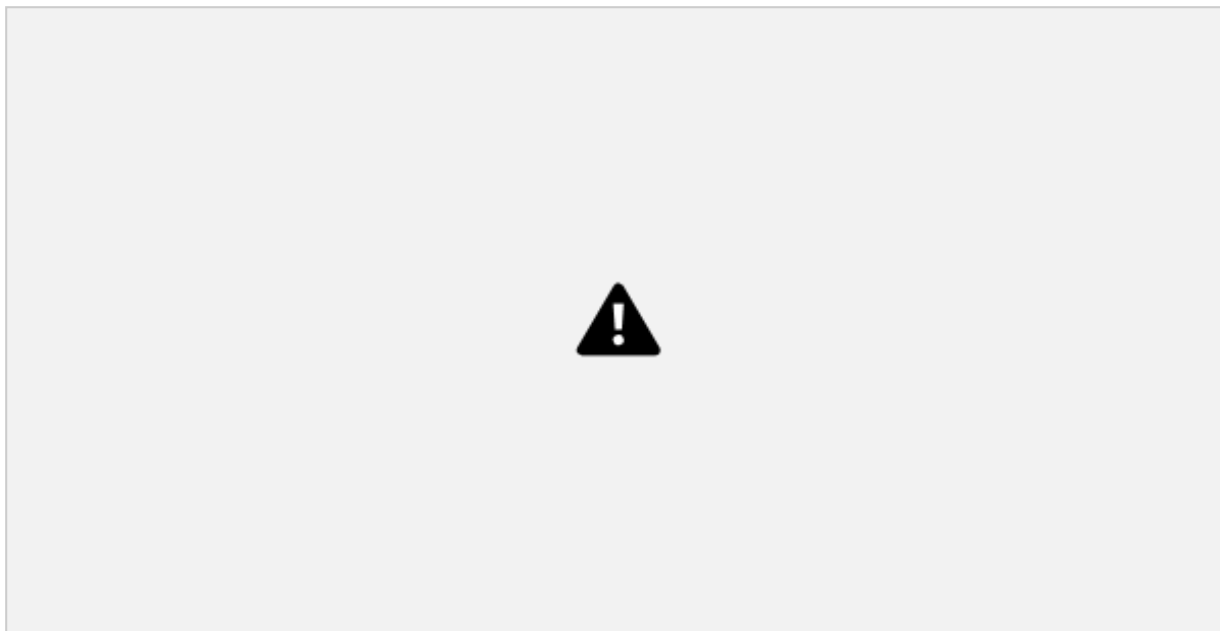


## Manage Group Members

View users assigned to a specific group and add users directly to a group.

## Technicians

Manage (add, edit, and deactivate) the technicians in your workforce. Once a users has been invited to the org by the Admin, the user is then ready to be added to the Workforce.
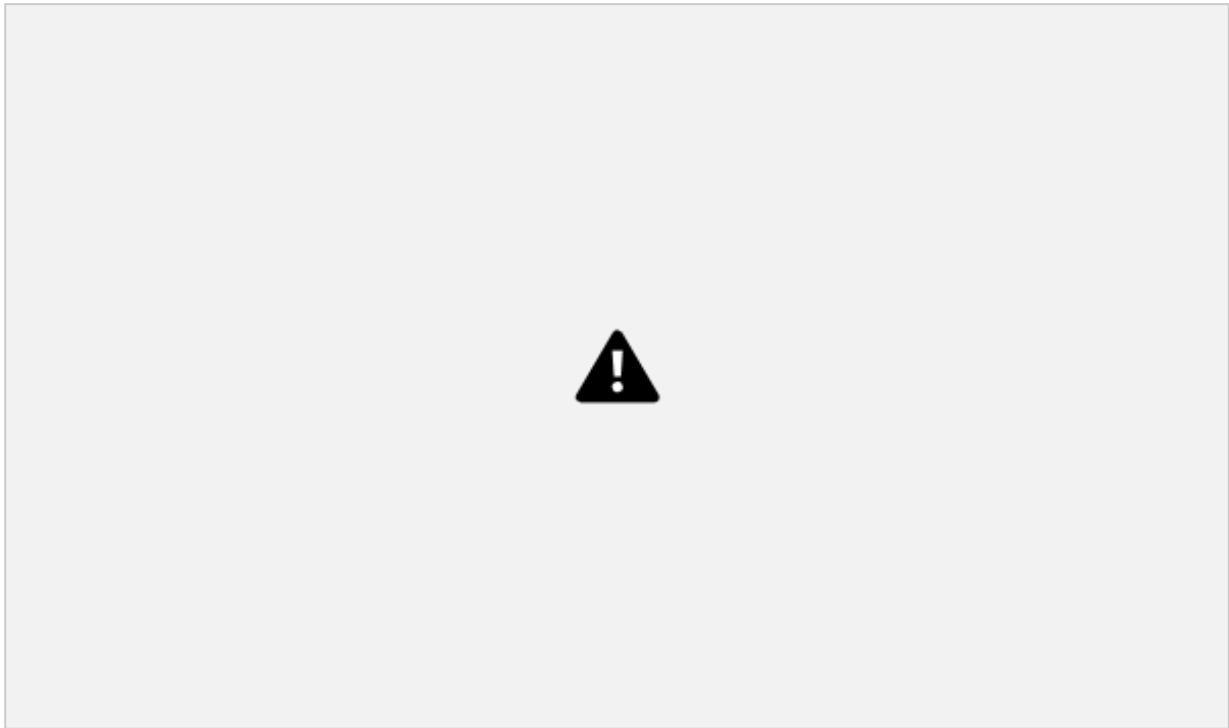
## Manage Technicians

Manage (add, edit and deactivate) the technicians in your workforce. Once a user has been invited to the org by the Admin, the user is then ready to be added to the Workforce.

## Provide Contact Details & Address / Home Base

Edit contact information and address which is used as the "Home Base" of a tech when running Auto Scheduler

## Assign Work Groups

Assign a Technician to Work Groups to set their task assignment eligibility based on Region, Work Order Type, Task Type, or Customer. Assign Technicians to the default "All" workgroup to open up their availability for assignment to any and all tasks.

## Assign Skills & Skill Levels

Assign Skills and Skill Levels to Technicians which are used by the Tech Recommendation / Auto Scheduler when matching a technician to a task type.

Skills and Skill Levels must first be added in Settings / Workforce Settings. Once added, the Skill/Skill Level can be assigned to a Tech.
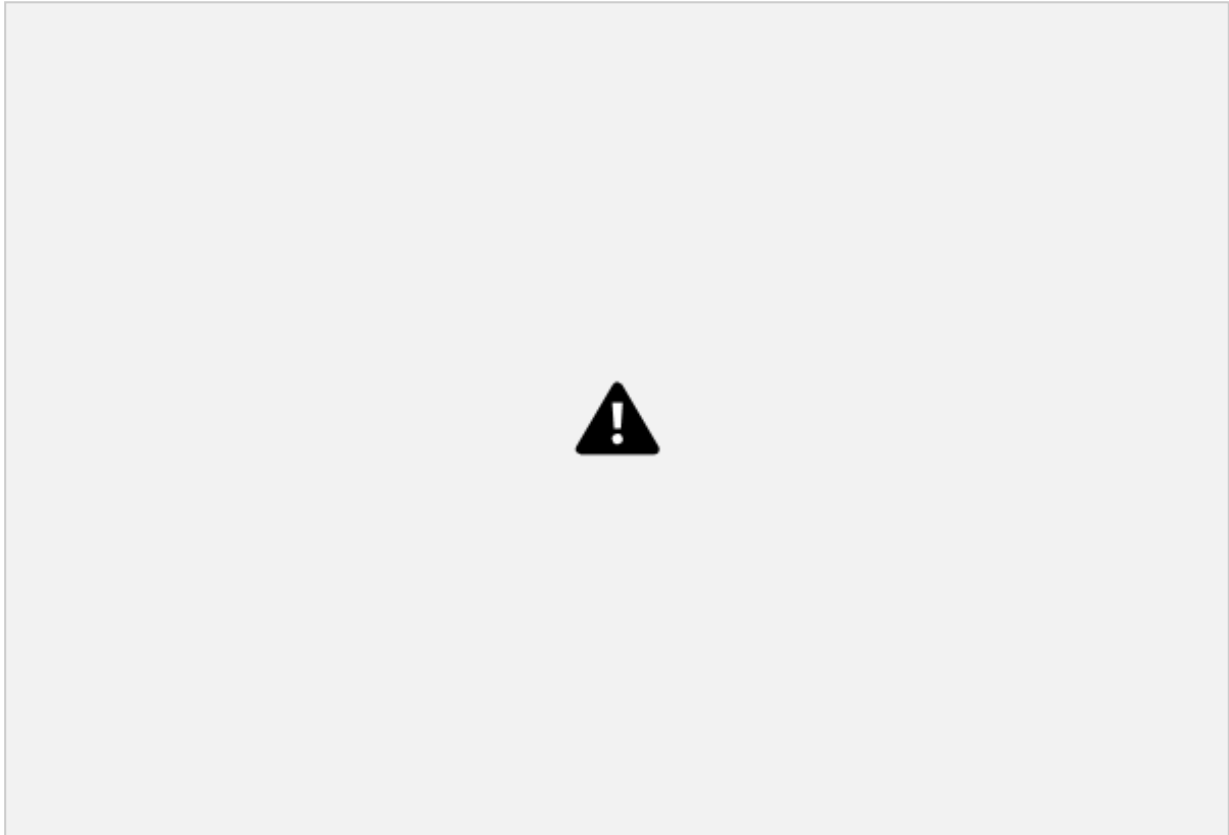


## Assign Work Schedule / Shift

Define the technician's Work Schedule which is used to determine the availability of a tech when scheduling and dispatching. This includes Leave, Overtime, and Shift.

## View Public Holidays

View the Public Holiday associated with the assigned Shift. Public holidays block off the tech's calendar and restrict tasks from being auto-scheduled on the given holidays.

## Add Leave

Add Leave to a tech's calendar which blocks off the availability from their calendar during the allotted times.
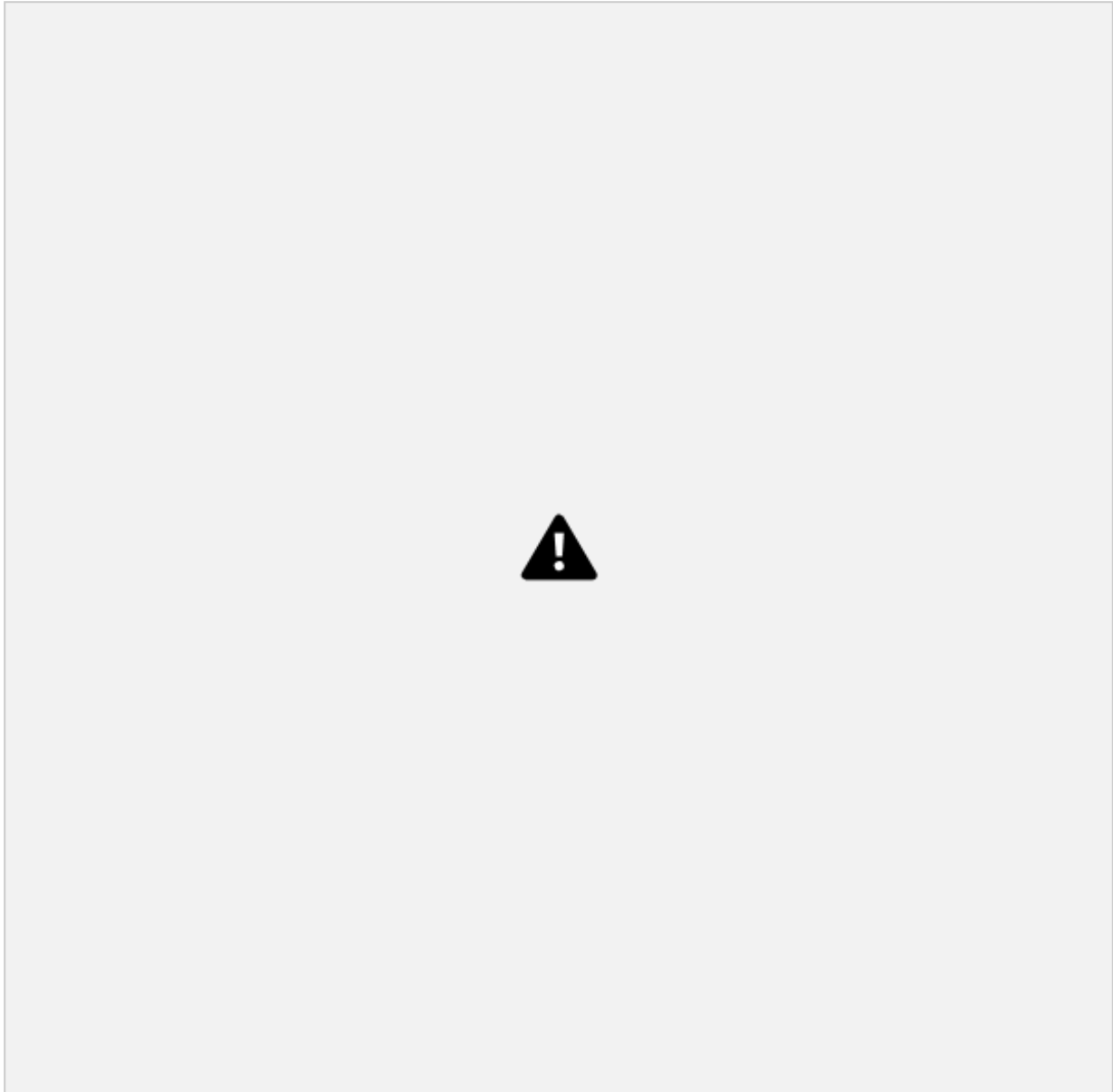


## Add Overtime

Add Overtime to a tech's calendar which adds availability to their calendar during the allotted times.
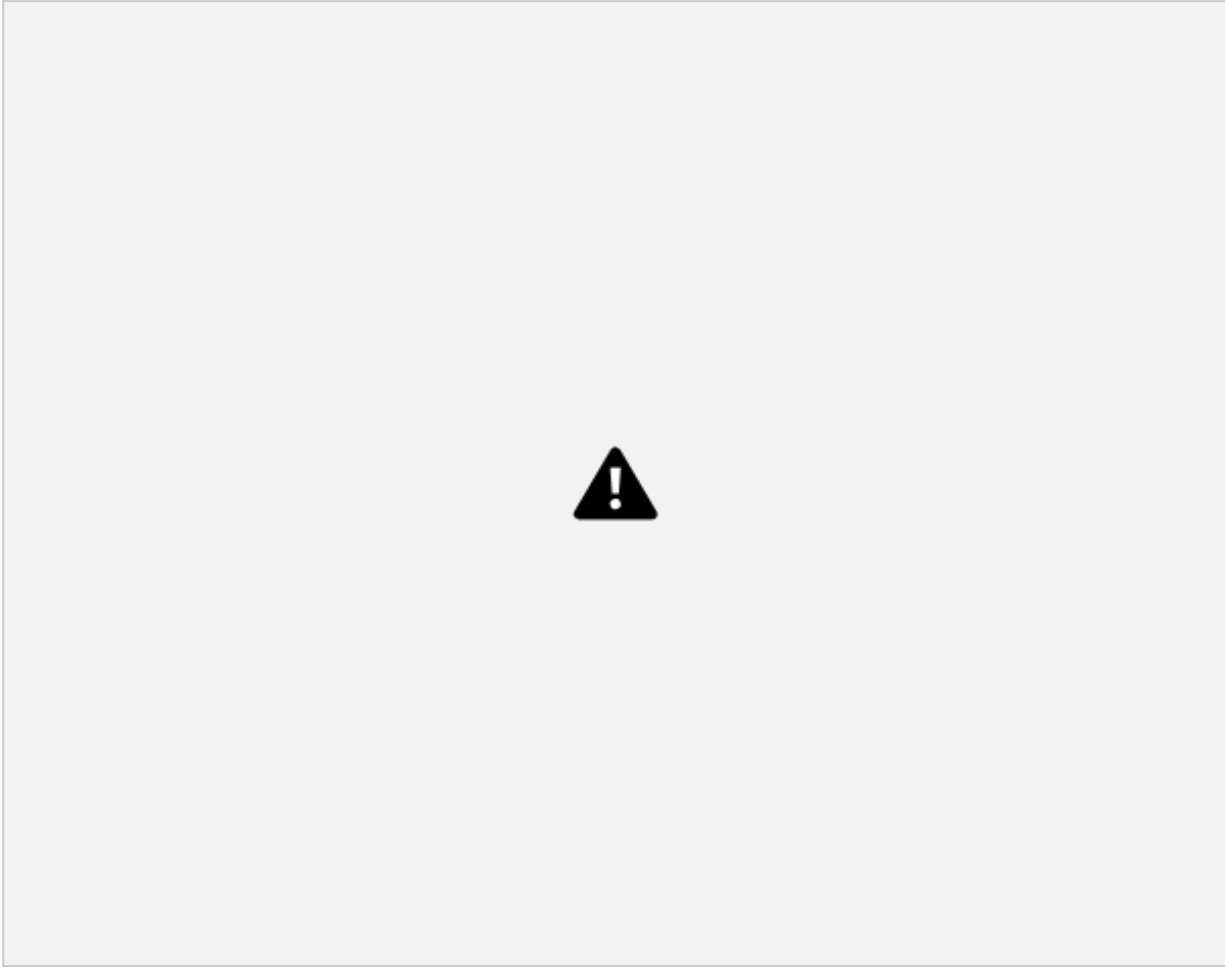
## Assign to a Contractor

Optionally assign the Tech to a Contractor.

View the tasks logs of the technician.
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## View Task Logs

## Web Users

Manage (add, edit and deactivate) users of FSE on the web (i.e. "Web Users") such as dispatchers, coordinators, inventory managers, project managers, etc. Once a user has been invited to the org by the Admin as a User, they are then ready to be added to the Web Users module in Workforce in order to track their contact information in FSE, shift, leave, overtime, etc.

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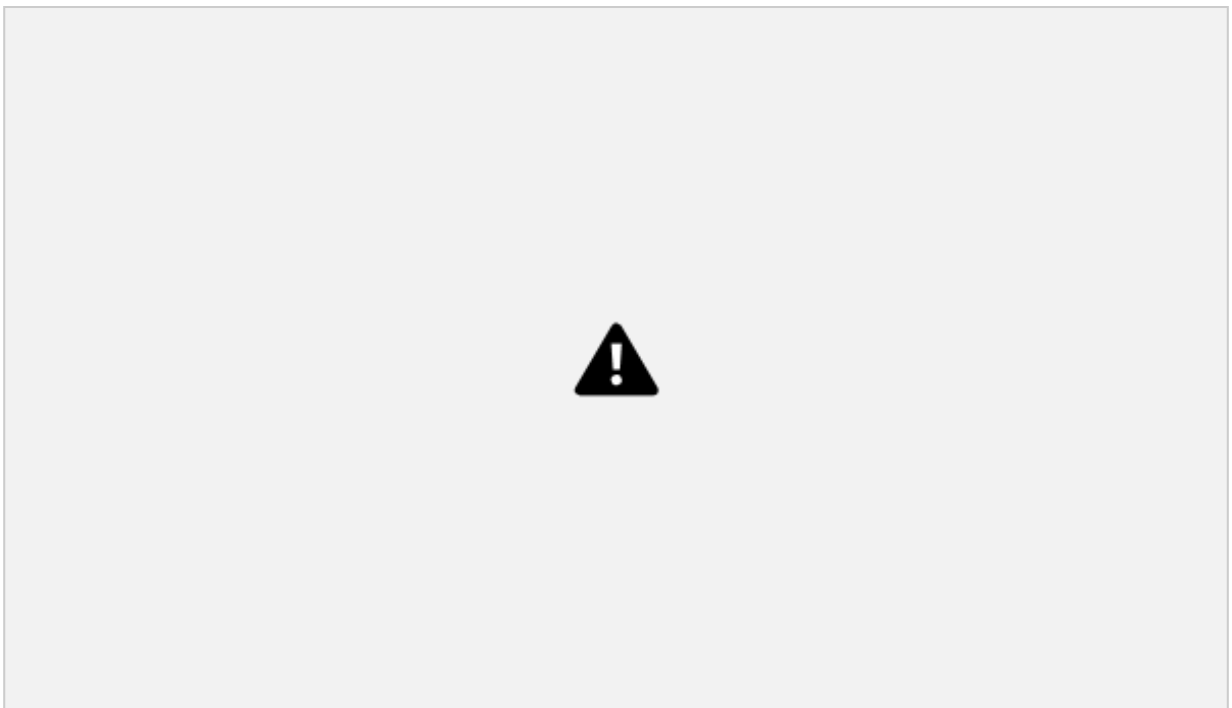
**Manage Web Users**

Manage (add, edit and deactivate) users of FSE on the web (i.e. "Web Users") such as dispatchers, coordinators, inventory managers, project managers, etc. Once a user has been invited to the org by the Admin as a User, they are then ready to be added to the Web Users module in Workforce in order to track their contact information in FSE, shift, leave, overtime, etc.

Currently, you can add all of this information for web users (shift, leave, overtime, etc) but it's not utilized in any additional functionality such as scheduling. The Web Users module lays the foundation for web user scheduling but it does not exist in the current out the of the box implementation of FSE.

## Provide Contact Details & Address
Maintain contact information for Web Users such as their phone number and address.

## Assign Work Groups
Assign a Web User to Work Groups to filter the tasks and technicians they see in the Task Scheduling module based on Region, Work Order Type, Task Type, or Customer. Assign Web Users to the default "All" workgroup and they will be able to see all tasks and all technicians in the Task Scheduling module, in both the List and Calendar Views.

## Assign Work Schedule /

Assign each web user a shift to keep track of normal working hours for back-office staff.

### View Public Holidays

View all public holidays observed by each web user according to their selected shift to ensure back office support is available when needed.

### Add Leave

Add leaves for web users to block out their availability.

### Add Overtime

Add overtime to web user's calendars to schedule them to work outside of their normal shift or on a public holiday.

# Contractors

Manage (add, edit) the Contractors in your workforce. Contractors are used as part of the matching criteria when assigning a Technician to a Task at a Customer Site. When Technicians are added to the Contractor, they are associated with the Region and Sub-region of the Contractor. Similarly, Customer Sites - where tasks are performed – can be associated with a Region and Sub-region. Thus when the Tech Recommendation attempts to match a Technician with a Task, it will check to see if the Region of the Customer Site matches the Region of the Contractor. If the Technician is associated with a Contractor with the same Region as the Customer Site, the Technician can be assigned to Tasks performed at the Customer Site.
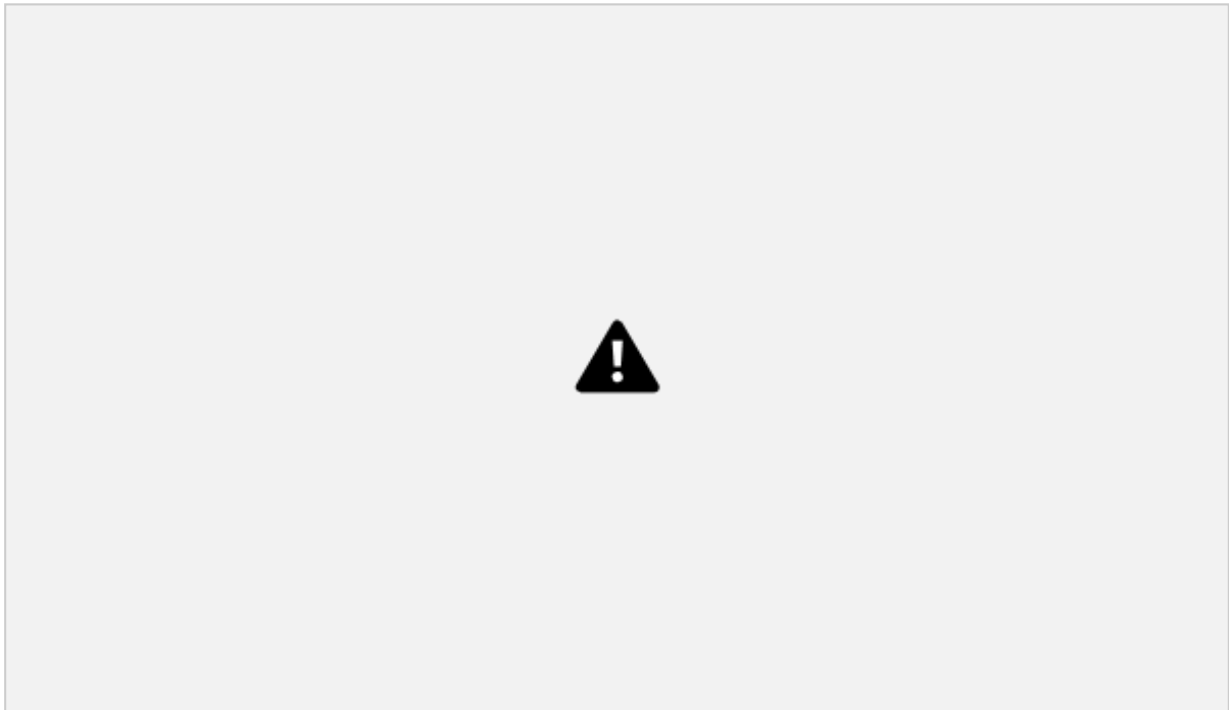


## Manage Contractors

Add the contact information (point of contact) and the base location of the contractor.

## Assign Regions / Sub-regions to a Contractor

Assign regions and sub-regions to a Contractor (and Customer Site). Regions are (optionally) used as part of the matching criteria when assigning a tech to a task at the site. If the tech is associated with a Contractor with the same region as the customer site, the tech can be assigned to tasks performed at the site.
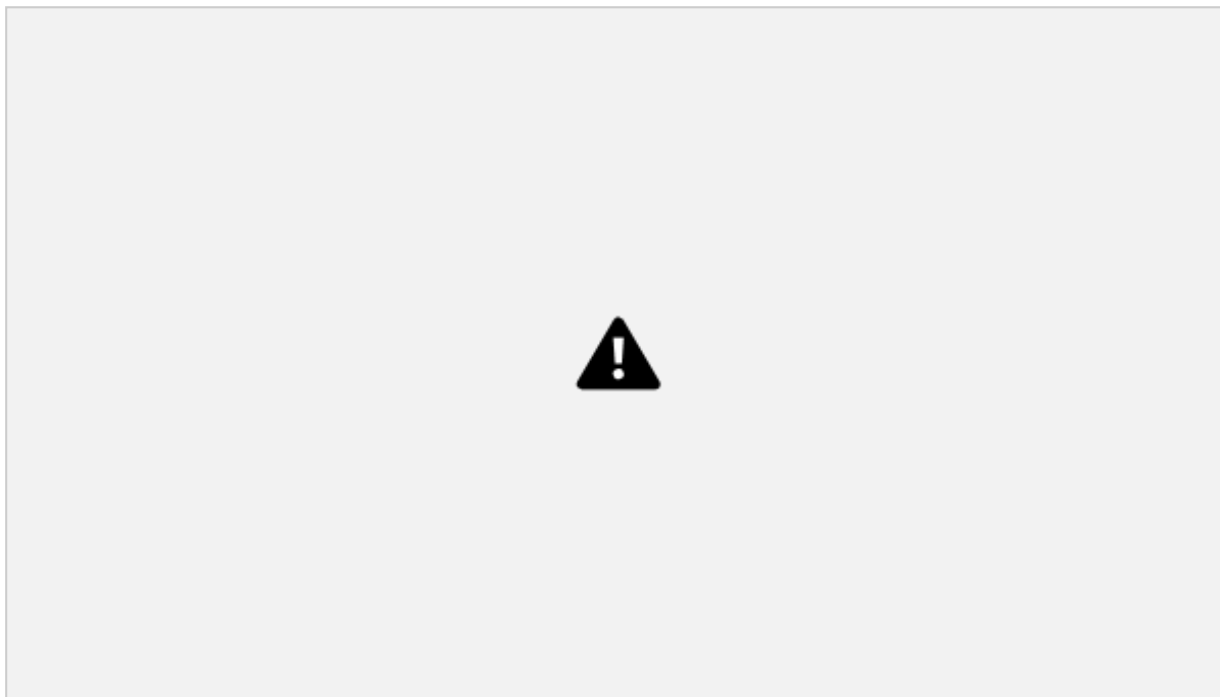


## View Assigned Techs

View a list of the Technicians assigned to a contractor.
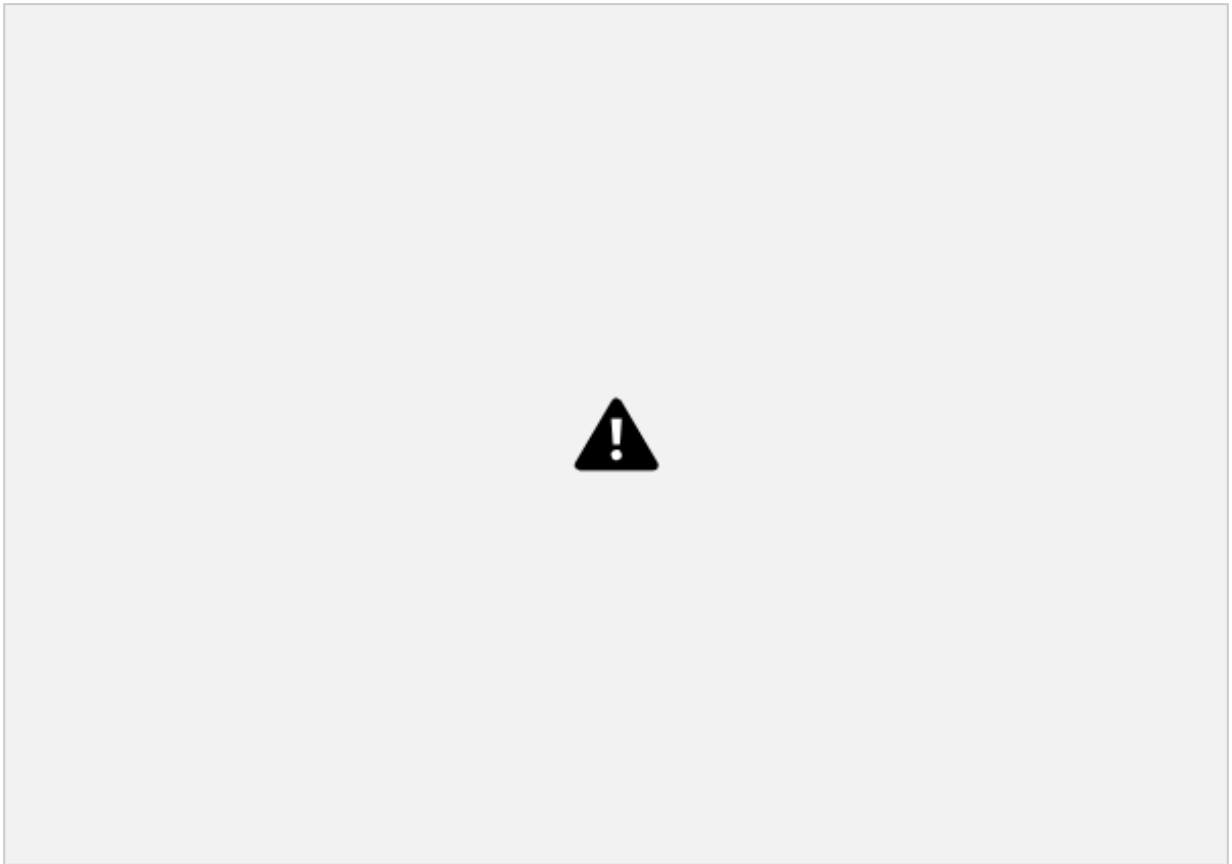
## Work Groups

Create Work Groups in order to filter Tasks and Technicians so dispatchers can focus only on their area of responsibility.

41
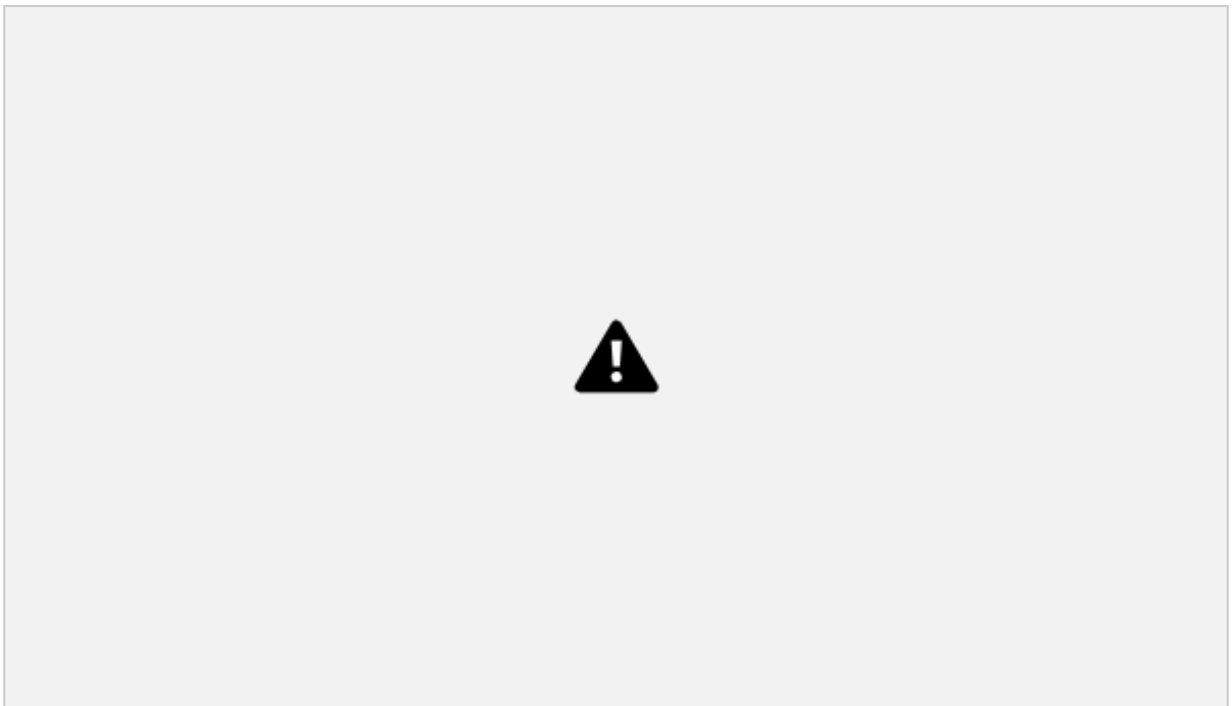
## Create and Manage Work Groups

Create Work Groups in order to filter Tasks and Technicians so dispatchers can focus only on their area of responsibility. Work Groups can be created based on the following filters:

- Region: When added to Region Work Groups, Dispatchers see only Tasks belonging to the Region in the Task Scheduling module and can only assign technicians to those tasks who also belong to the same Region.
- Work Order Type: Dispatchers only see Tasks belonging to certain WO Types and Technicians can only be assigned if they belong to the same WO Type workgroup
- Task Type: Dispatchers only see Tasks of certain Task Types and Technicians can only be assigned if they belong to the same Task Type workgroup
- Customer: Dispatchers can only see Tasks for certain Customers and can only assign Technicians to those Tasks who also belong to the same Work Group.
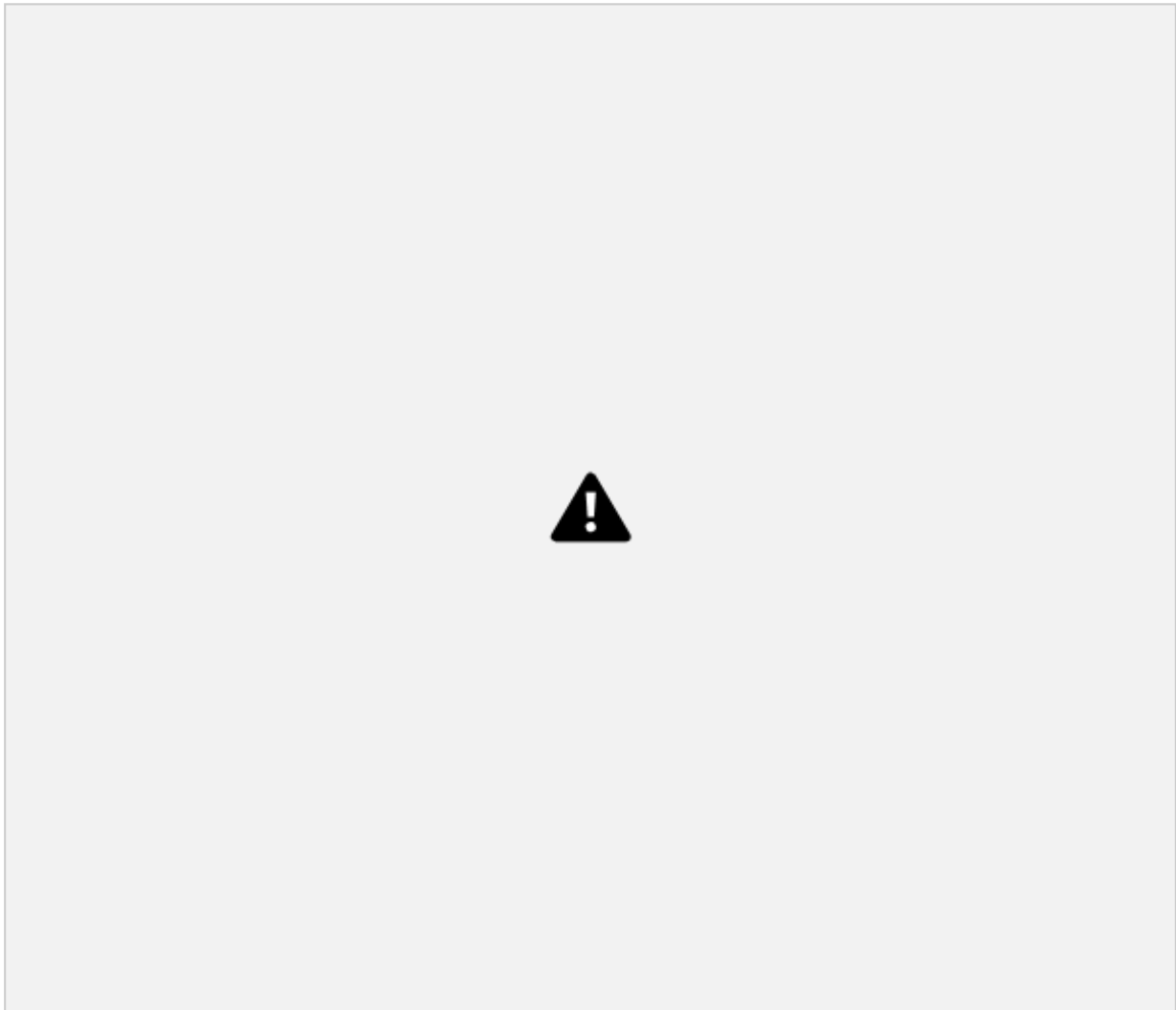


## Assign Technicians and Web Users to Work Groups

Add Technicians and Web Users to Work Groups. One user (Web User or Technician) can belong to multiple Work Groups. Note the logic for multiple group membership:

*If a user belongs to multiple groups of the same Filter Method*

- If a user belongs to multiple groups of the same Filter Method (example: Two "Region" workgroups), an "or" operator is applied so they see tasks and technicians for all Work Groups they belong to for that type.

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- Example: if I belong to a workgroup for Region = "North" and Region = "West" I will see all Tasks and Technicians for the North and West regions.

*If a user belongs to multiple groups of different filter methods*

• If a user belongs to multiple groups of different filter methods (example: one Region workgroup and one Task Type work group), an "and" operator is applied so they see a filtered list of tasks and technicians based on both of those filters.
• Example: I belong to a WG for Region: North and Task Type: Corrective Maintenance so I only see Corrective Maintenance Tasks in the North Region.



43
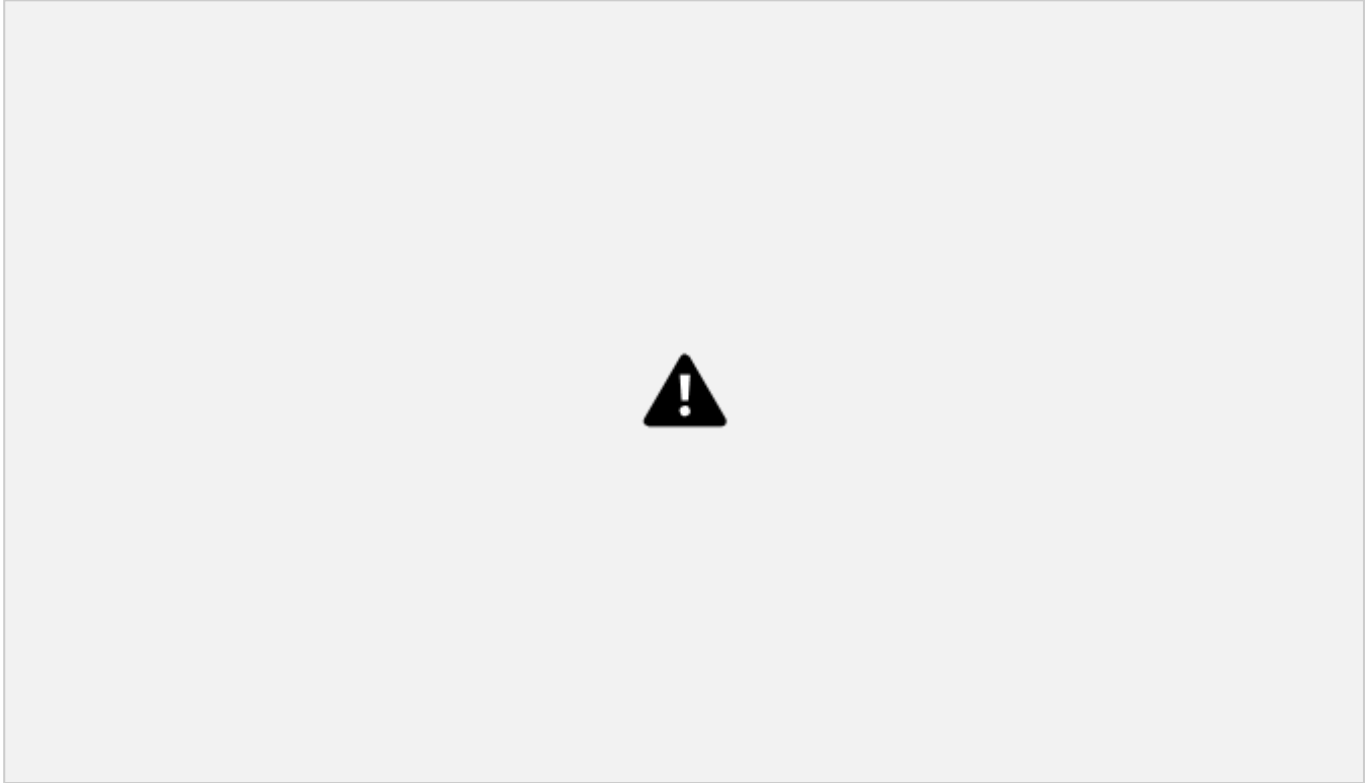
## Workforce Management Settings

The following section describes the various settings associated with managing your Workforce.

### Manage Skills & Skill Levels

Define a master list of Skills and Skill Levels. Once defined, these can be assigned to Technicians (and Task Types) and used by the Tech Recommendation / Auto Scheduler.

Skills and Skill Levels must first be added in Settings / Workforce Settings. Once added, the Skill/Skill Level can be assigned to a Tech.

FSE KNOWLEDGE BASE
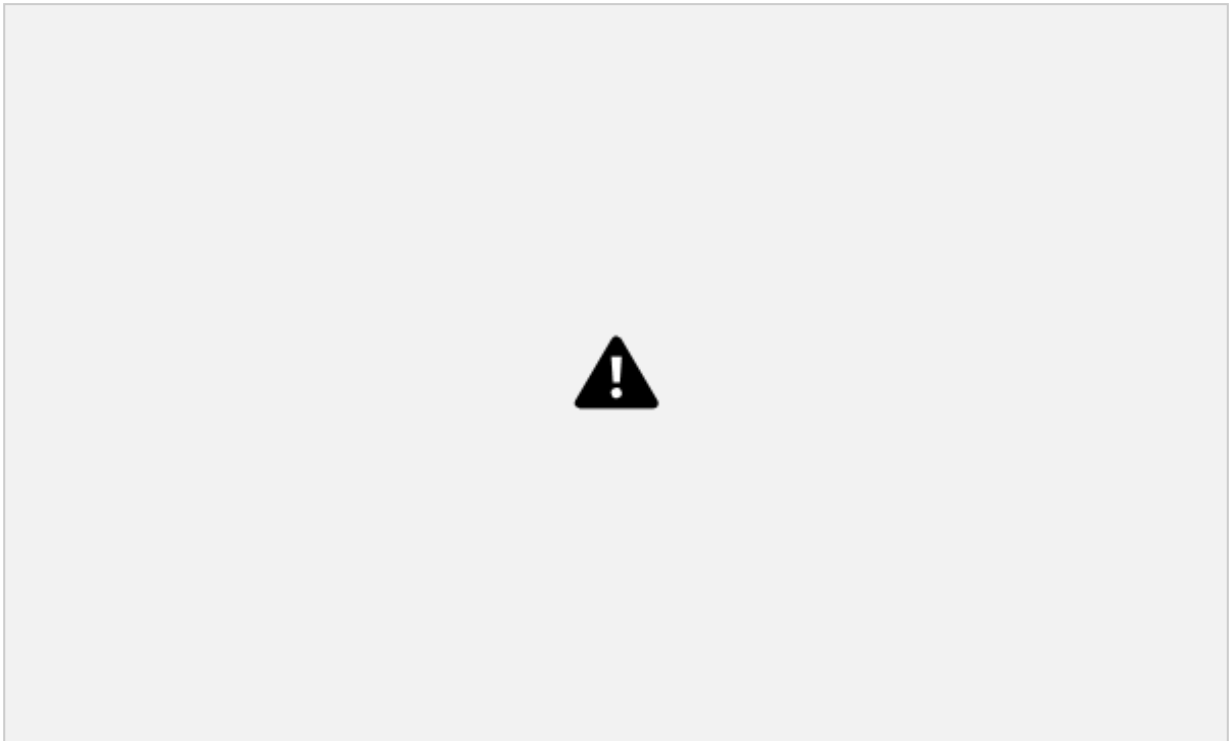
## Manage Shift Configurations for Techs

Define (add and edit) a master list of Shift Configurations. Shifts define the weekly schedule and public holidays for a technician and are used to determine the availability of a tech when scheduling and dis patching. Once defined, Shifts can be assigned to Technicians.

A Shift must first be added in Settings / Workforce Settings. Once added, the Shift can be assigned to a Tech.



45
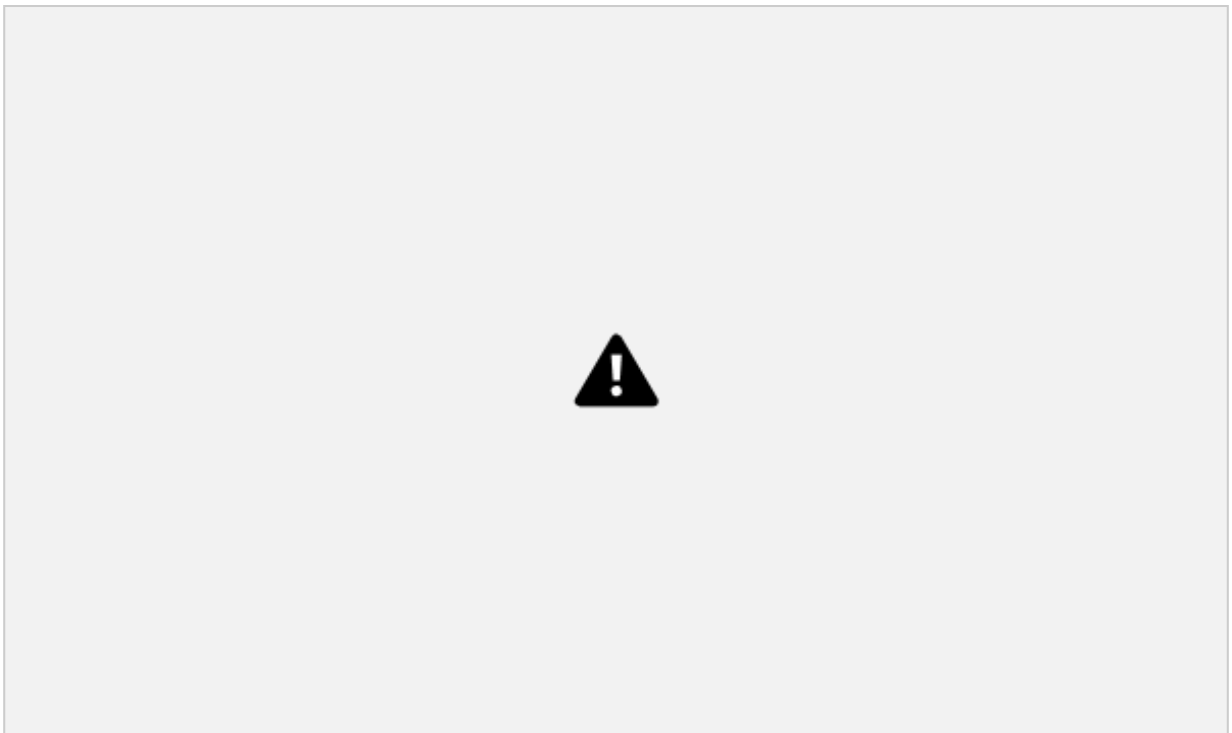
## Manage Public Holidays

Define (add and edit) a master list of Public Holidays for the Org. Once added, a Public Holiday can

be applied to a Shift to block off the tech's calendar and restrict tasks from being auto-scheduled on the given holidays.
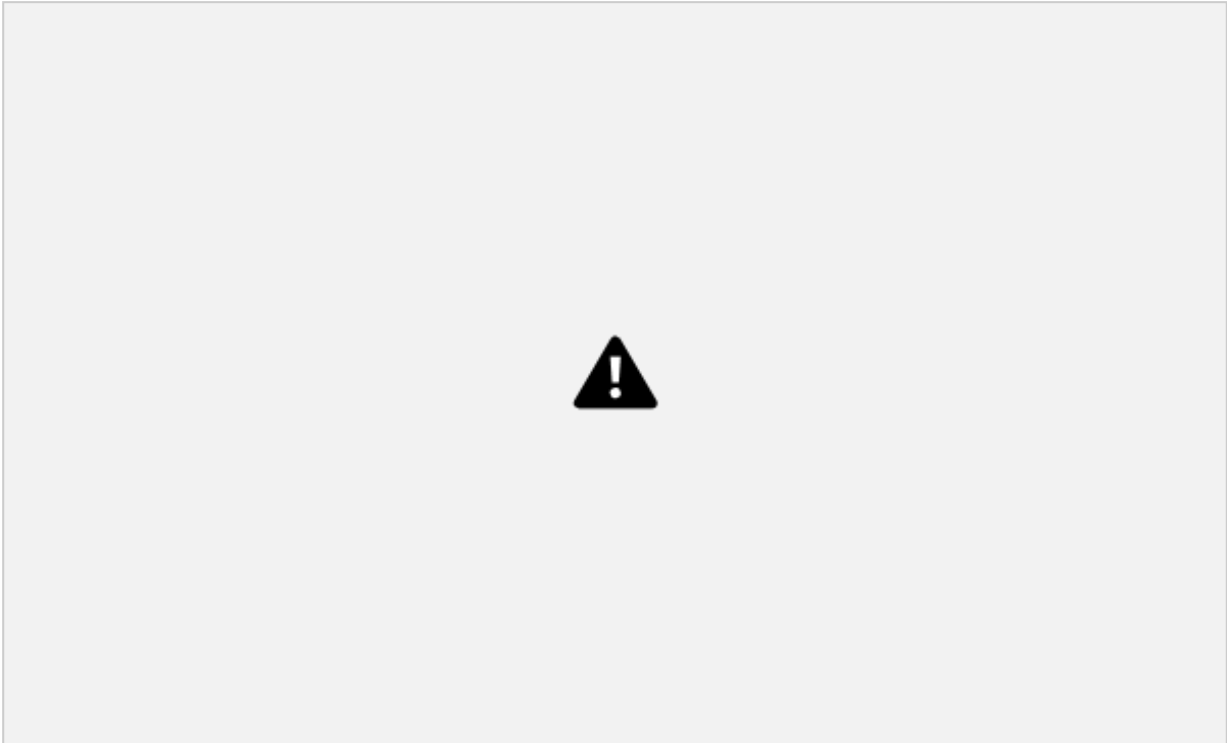


## Manage Regions / Sub-regions

Define (add and edit) a master list of Regions / Sub-regions. Regions are (optionally) used as part of the matching criteria when assigning a Technician to a Task at a Customer Site. When the Tech Recom mendation attempts to match a Technician with a Task, it will check to see if the Region of the Customer Site matches the Region(s) of the Contractor(s) the Technician is associated with. If the Technician is associated with a Contractor with the same Region as the Customer Site, the Technician can be as signed to Tasks performed at the Customer Site. Once added, a Region can be assigned to a Contrac tor and Customer Sites.

# Work Order Management

## Overview

Work Orders capture all the information needed for a field service technician to complete fieldwork for a customer. Work Orders can contain any number of tasks which are then sent to the Scheduling & Dispatch module for deployment. In addition to being the vehicle for deploying tasks to the field, Work Orders also allow you to track the use of parts, Consumables, and Resources needed to complete those tasks. Once the Work Order is complete, the information it contains can then be used to create an invoice for the customer through the **Billing & Invoicing** module.

## Work Orders

Where Work Orders are managed in the organization.

## View Work Orders by Status

View the status of Active and Completed Work Orders. Work Orders can have one of the following statuses:

*Draft*: Status before publishing a work order. In this state, it can be deleted if created in error.

*Open*: Work Order is saved and tasks can be added. In Open status, the Work Order can be edited and/or canceled.

*Scheduled*: At least one task in the Work Order has been published and is in one of these statuses: S**cheduled, In Progress, Pending Review, Reopene**d. In this state, the work order can be edited or canceled.

*Completed*: When all tasks within the Work Order are completed, the Work Order automatically transitions to Completed status. Completed Work Orders may contain one or more tasks that have been cancelled, but at least one was completed.

*Cancelled*: This status indicates the Work Order was canceled by a web user. All tasks which were not previously completed are also cancelled by default when the parent work order is canceled. Canceled Work Orders and Tasks cannot be reopened.

**Add, Edit & Cancel**

Manage (add new, edit, and cancel) Work Orders.

**Assign a Work Order Type**

Assign a Work Order Type. Work Order Types do XXX. Work Order Types must first be added in **Set tings > Work Order Settings**. Once added, Work Order Type can be assigned to a WO.

**Assign a Priority**

SLA, Priority, and Deadlines: The Priority you select for a Work Order has a direct relationship to the SLA you choose for that Work Order, so it is important to be mindful of how this relationship works. SLAs use the concept of Priority Time Frames which tie a particular SLA Resolution Time to the particu lar Priority you set when creating a Work Order. When you select a Priority for the Work Order, it will take the SLA Resolution Time and use that to calculate the default Deadline for the Work Order and Tasks added to the Work Order.

Priorities are added by the Solutions Admin. FSE comes with the following Default

priorities: Low, Medium, High

**Assign a Customer**

Assign a Customer to a Work Order. The customer determines which Contracts can be added to a WO and which Customer Sites a task added to the Work Order can be assigned to.

Customers must first be added from the Customers module. Once added, a Customer can then be as signed to a Work Order.

**Assign a Contract**

Select the contract which is tied to the Work Order. This list is populated based on the Customer (a Customer may have more than 1 Contract) and determines the SLA and Service Window used in the Work Order.

Contracts must first be added from the Contracts module. Once added, a Contract can then be as signed to a Work Order.

## Save as a Work Order Templates

Save a Work Order as a Work Order Template. Work Order Templates make it faster and easier to create Work Orders by pre-populating the fields with frequently used configurations.

# Work Order Settings

Work Orders Settings are managed in a few different modules in FSE.
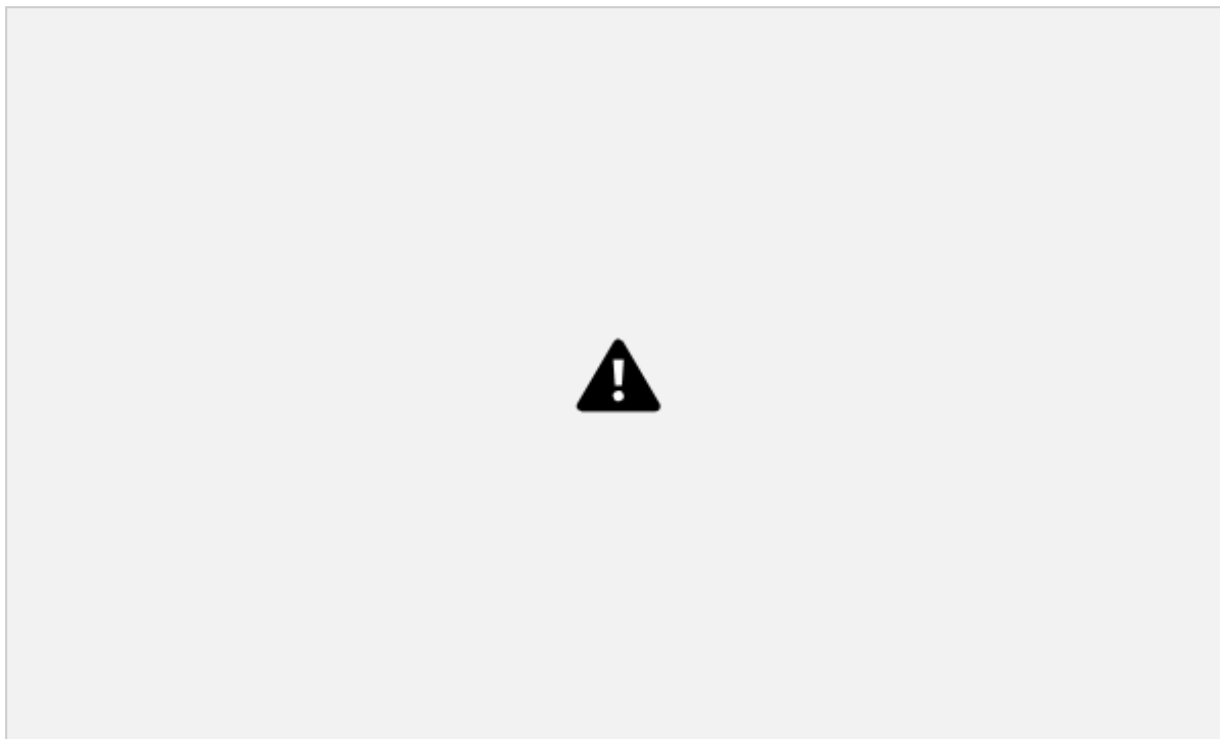


### Define Work Order Types

Define Work Order Types which are used to configure settings such as which List Option to use when canceling a Work Order and whether or not a Work Order can contain mobile tasks.

### Pre-configured Work Order Types

FSE comes with three pre-configured Work Order Types associated with the Standard Mobile Work flows that come out-of-the-box: Corrective Maintenance, Preventive Maintenance, and Simple Installation. For more information, view the Standard Mobile Workflows section.

**Manage Work Order Templates**

Edit and delete Work Order Templates created from the Work Orders module. Work Order Templates make it faster and easier to create Work Orders by pre-populating the fields with frequently used configurations.

**Manage SLAs**

Configure different SLA Resolution Times for each Work Order Priority (Low, Medium, High, etc.) to en force specific contract terms and assist with scheduling and dispatch. SLAs are tied to Work Orders by Customer Contracts. SLA Resolution Time and Default Deadline are pre-populated based on the Con tract assigned to the Work Order.

SLAs use the concept of Priority Time Frames which tie a particular SLA Resolution Time to the particu lar Priority you set when creating a Work Order. When you select a Priority for the Work Order, it will take the SLA Resolution Time and use that to calculate the default Deadline for the Work Order and Tasks added to the Work Order.

SLAs must first be added to **Settings > Business Settings.** Once added, an SLA can be assigned to a Contract which then ties it to the Work Order.

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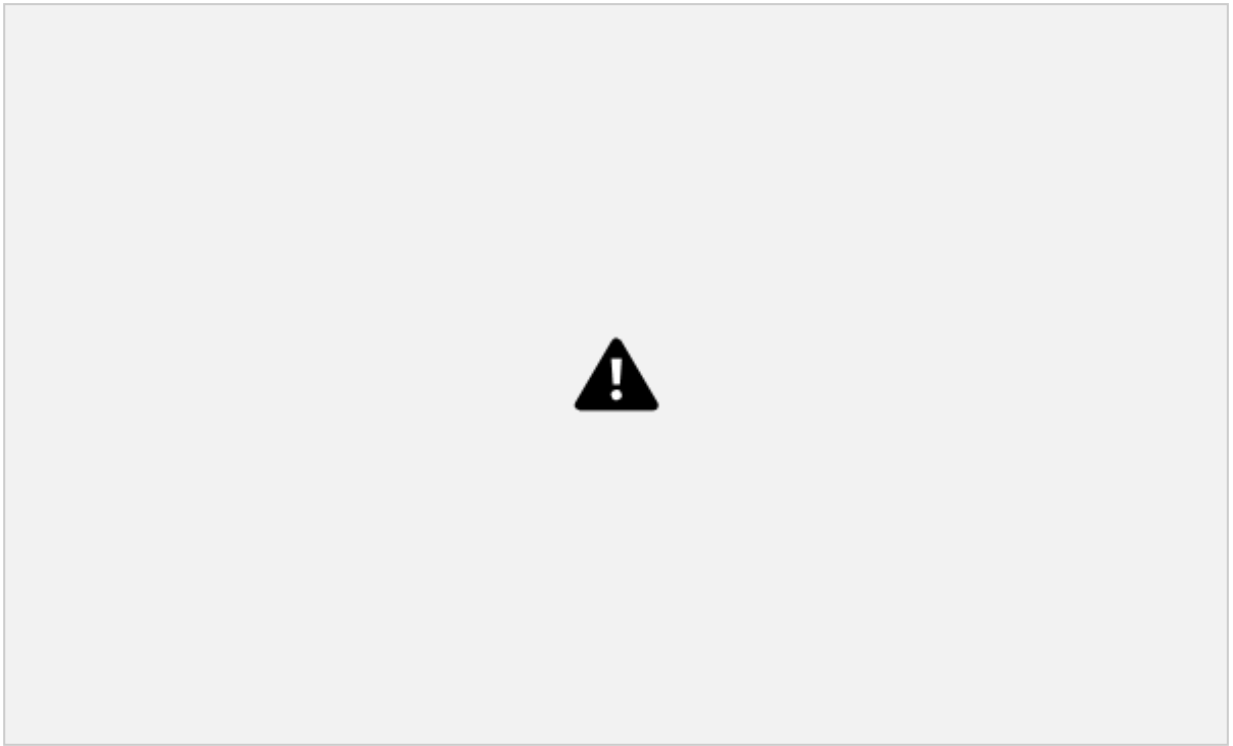
## Manage Service Windows

Service Windows determine the hours of operation when a task can be performed at a Customer Site associated with the Work Order. When adding Tasks to a Work Order, it must be assigned a Customer Site, which is the location at which the task must be performed.

The Service Window is pre-populated based on the Contract assigned to the Work Order.

Service Windows must first be added to **Settings > Business Settings**. Once added, a Service Win dow can be assigned to a Contract which then ties it to the Work Order.

## Set a Default Service Window

Set the default Service Windows used by the organization. The default value will then be used when creating Contracts.

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Add tasks to a Work Order, Save as Draft or Publish a Task, which sends the task to Task Scheduling for dispatch.

## Assign a Task Type

All tasks added to a Work Order must have a Task Type. Task Types define the configuration of a task, including the Mobile Workflow, the results model and results sidepanel, the default estimated duration, the Skills and Skill Levels required, and the task approval settings. For more information, see the Task Types section below.

Task Types must first be added in **Settings > Work Order Settings**. Once added, Task Type can be assigned to a task in a Work Order.

## Pre-configured Tasks Types

FSE comes with several pre-configured Task Types associated with the Standard Mobile Workflows that come out-of-the-box: **Corrective Maintenance, Corrective Task Request, Preventive Maintenance, Simple Installation, and Site Change Request**. For more information on the different Task Types, see the section on Standard Mobile Workflows.

## Provide an Estimated Duration

The estimated duration is used in Task Scheduling to determine the block of time a task takes to complete. The default value comes from the Task Type but can be over-ridden when added to a Work Order. It is also seen by technicians when they browse their task list on the mobile app. For example, if a
user is assigned a task at 9:00 am and the duration is 60 minutes, the task will then show 9:00 am - 10:00 am in their task list.

## Assign to a Customer Site

The Customer Site table is auto-populated with sites associated with the Customer you select for the Work Order. This is an important field as if the Mobile Workflow requires a Geo-Checkin, it will use the GPS coordinates (Lat/Long) of this site as the check-in location.

Customer Sites must first be added from the Customers / Customer Sites module. For more details, see the **Customers** section below.

## Provide a Scheduled Start Date

Users have the option of adding a Scheduled Start Date to a task. If added, the date and time will be shown to the dispatcher when assigning the task from Task Scheduling. Dispatchers can also change the date from Task Scheduling at any time.

## Send Notes to Dispatcher

When adding a Task, users can add an optional Note to the task which will be visible by the person dispatching the Task. This is useful for sending specific details or comments about the task, site, or customer to aid the dispatcher in performing their duties.

## Assign Services to a Task (Optional)

Services are first configured for each Task Type in **Settings > Work Order Settings > Task Types**. When creating a new Task Type, users must select if they want to use services (Services: Enabled / Disabled) and if Services are Enabled, they must define the list of default Services on the Task Type.

When adding a Task to a Work Order, users will see the pre-defined list of Services if enabled and can select none, one, multiple, or all of the default Services to add to that particular task. Any Services add ed to the task are then visible to the assigned Technician in their mobile workflow when performing the task, but it is not required that the technician perform all Services added to the task since it acts more like a catalog than a requirement.

## Configuring Task Types

Define Task Types that are used to manage the configuration of a task, including the Mobile Workflow, the results model and results sidepanel, the default estimated duration, the Skills and Skill Levels re quired, and the task approval settings. FSE comes with several pre-configured Task Types associated with the Standard Mobile Workflows that come out-of-the-box: Corrective Maintenance, Corrective Task Request, Preventive Maintenance, Simple Installation and Site Change Request. These task types also come with all of the associated objects required to make them function correctly (i.e. the mobile work flows, results sidepanels, results models etc.). For more information on the different Task Types, see the section on Standard Mobile Workflows below.
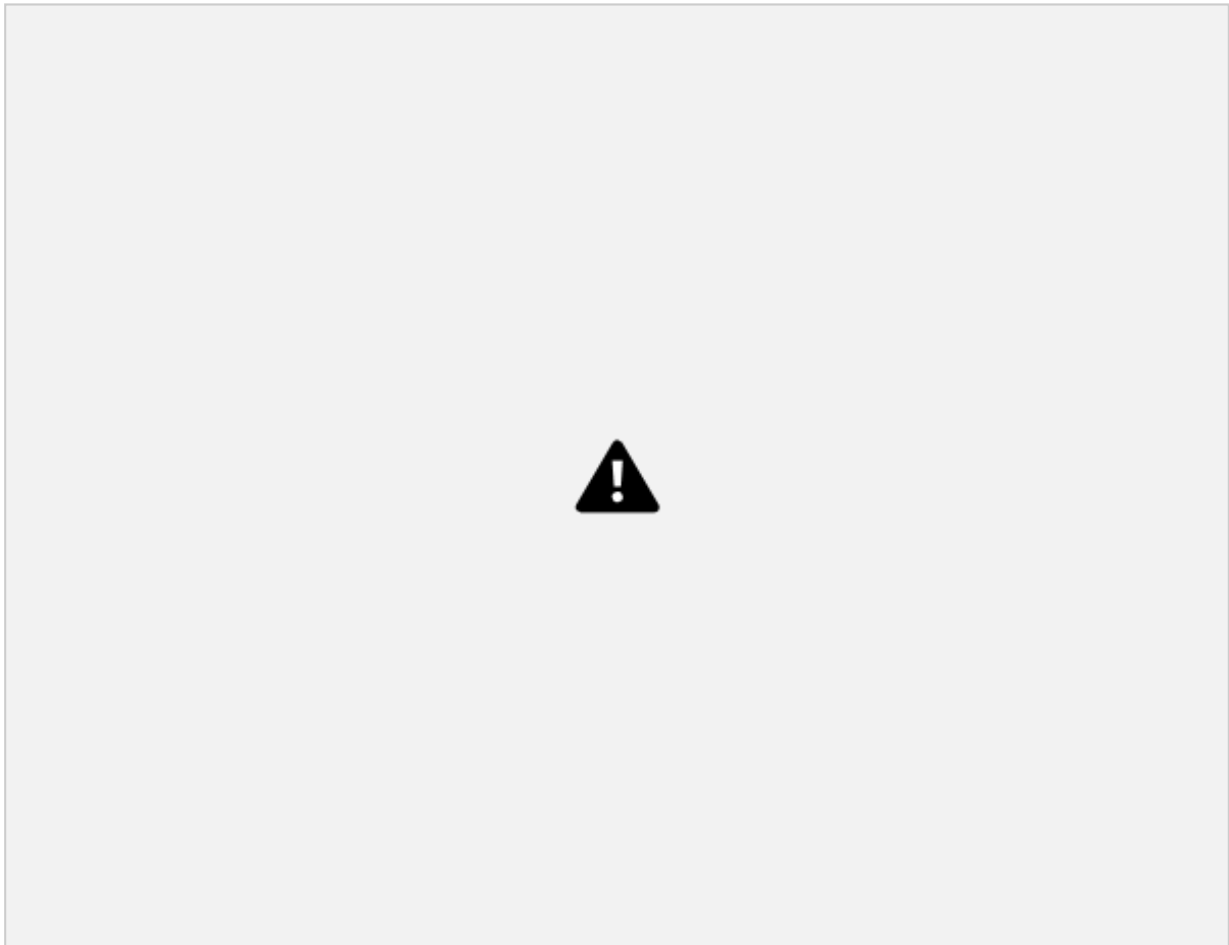


### Define a Task Type as a Web Task

Define a Task Type as a Web-only task. Web tasks are used for tasks completely entirely from the Web app and do not have a mobile workflow.

### Define Mobile Workflows for a Task Type

Define the Mobile Workflow associated with the Task Type. The Mobile Workflow is the workflow sent to a user assigned to the task. When the task is dispatched to the user, the Mobile Workflow appears in the Task List in the Zinier Mobile App. The Mobile Workflow must first be created using Studio Z.

### Enable or Disable Services for a Task Type

Enable or Disable Services on each task type and if enabled, define the default Services associated with the Task Type. Each pre-configured Tasks Type comes with a set of pre-defined Services which are a set of smaller steps for the Technician to follow when performing a task. Services represent are a set of smaller steps for the Technician to follow when performing a task. Services must first be added from the Catalog / Services module and configured as part of the Mobile Workflow in Studio Z.

### Define the Estimated Duration of a Task Type

Define the Estimated Duration for the Task Type. The estimated duration is used in Task Scheduling to determine the block of time a task takes to complete. The default value comes from the Task Type but can be over-ridden when added to a Work Order. It is also seen by technicians when they browse their

task list on the mobile app. For example, if a user is assigned a task at 9:00am and the duration is 60 minutes, the task will then show 9:00 am - 10:00 am in their task list.

### Define the Results Model of a Task Type

Define which Results Model is used by the Task Type to capture the data collected in the Mobile Work flow. The Results Model must first be created using Studio Z.

### Define the Results Sidepanel of a Task Type

Define which Results Sidepanel the Task Type will display. The Results Sidepanel dictates how the re sults stored in the Results Model are displayed when a task is submitted for approval and corresponds to the Web Page that was built for that specific Mobile Workflow. The Results Sidepanel page must first be created using Studio Z.

### Define the list of Rejection Reasons for a Task Type

Define which dropdown menu options (List Options) to show in the Task Approval sidepanel when a user rejects a task.

### Define the list of Cancellations Reasons for a Task Type

Define which dropdown menu options (List Options) to show when a dispatcher cancels a from the Task Scheduling module.

## Define the Services for a Task Type

If Enabled from the previous screen users can define the default Services associated with the Task Type. Each pre-configured Tasks Type comes with a set of pre-defined Services which are a set of smaller steps for the Technician to follow when performing a task. Services represent are a set of smaller steps for the Technician to follow when performing a task. Services must first be added from the Catalog > Services module and configured as part of the Mobile Workflow in Studio Z.
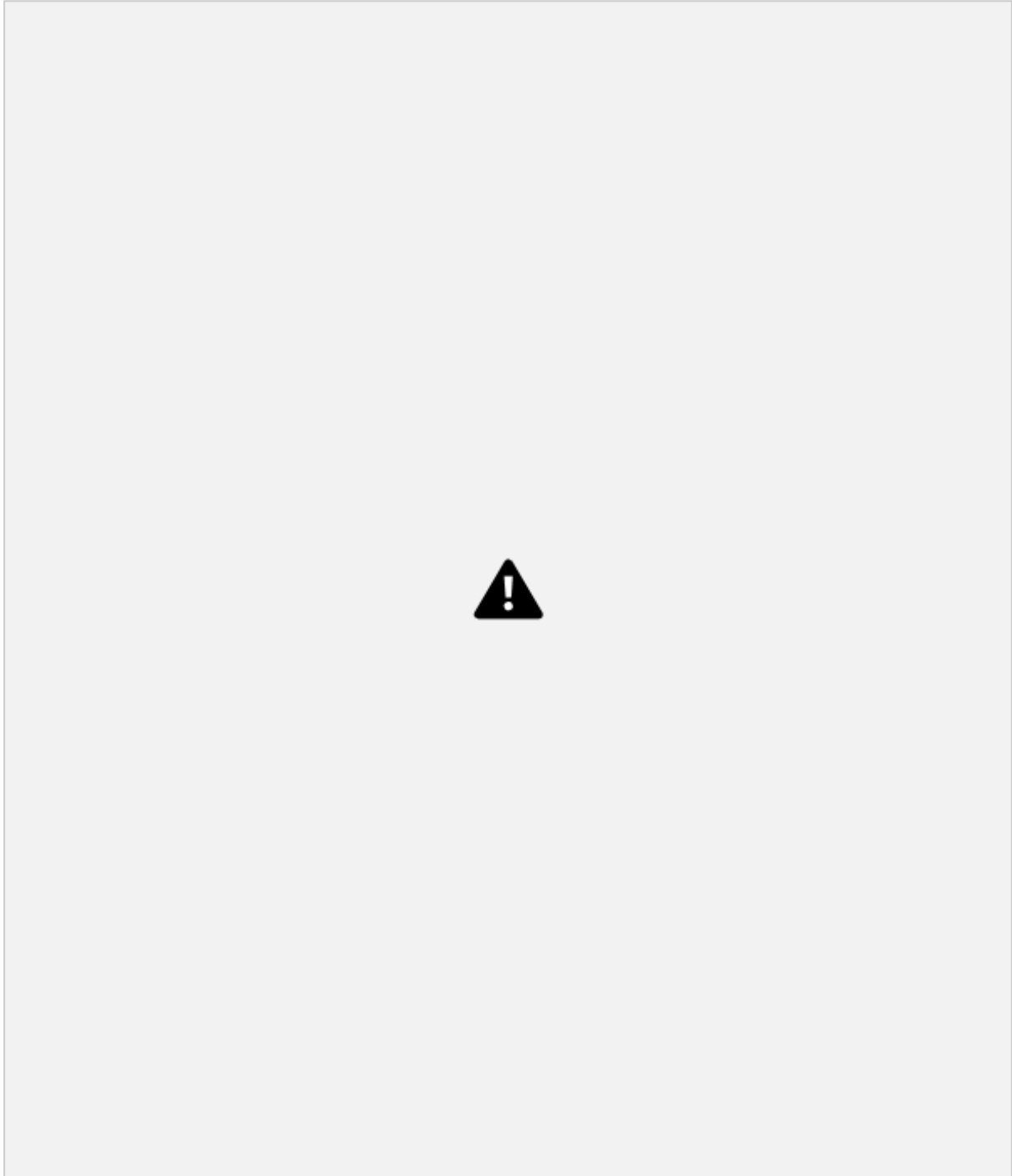


## Define the Required Skills and Skill Levels for a Task Type

Define the Skills and Skill Levels requirements of the Task Type. These are then compared to the Skill and Skill Levels of a technician when the Tech Recommendation / Auto Scheduler is run.

# Assets & Inventory

## Overview

Assets and Inventory are managed in several different modules in FSE. The Assets module is used to track your Assets and details such as the serial number, contract, customer, and date of purchase of an Asset. Assets are also important inputs in Work Orders where tasks (such as preventive and corrective maintenance tasks) can be performed on and linked to particular Assets.

The Inventory module tracks Parts and Materials used in Work Orders and the Stock Location and quantities of inventory at each location.

## Assets

Where Assets are managed in FSE. Assets are tracked at Customer Sites.
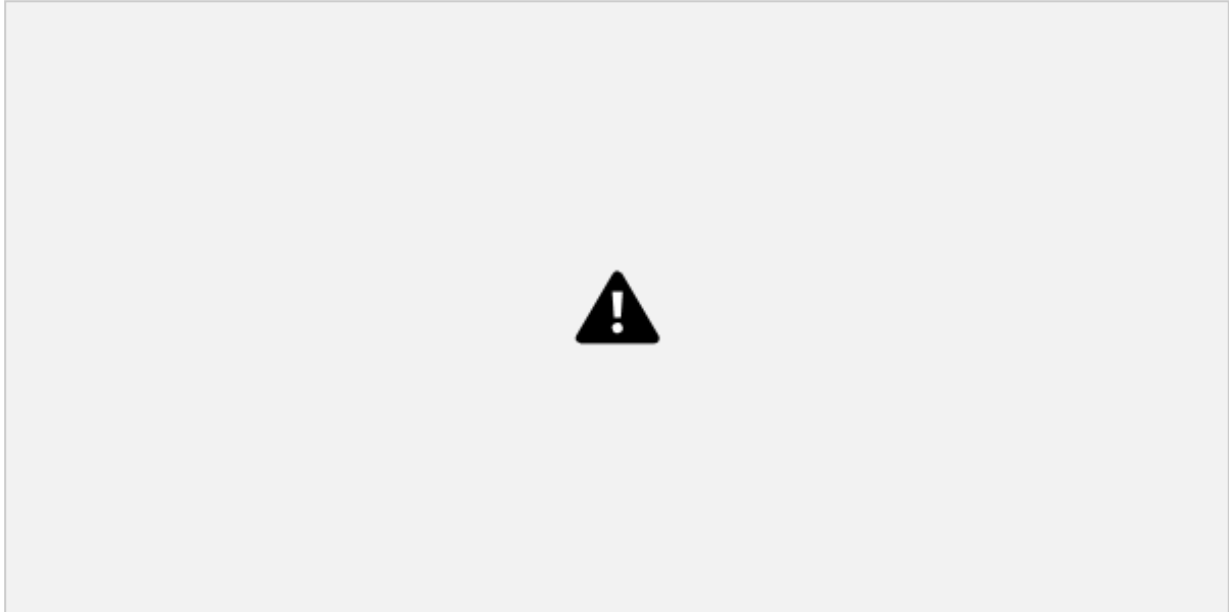


### Add and Edit Assets at Customer Sites

Manage (add and edit) individual assets installed at customer sites.

To add an Asset to a Customer Site, the customer site must first exist and the Asset must exist in the **Parts & Assets Catalog**. For more information, see the **Customers** section and **Catalogs** section.

### View Assets at Each Customer Site

Users can view a list of Assets installed at each Customer Site.

**Provide Asset Information**

Select the asset to install at the Customer Site from the pre-populated list of Assets from the Parts & Assets Catalog. This will pre-populate the Manufacturer and Model Number fields. Users can then add a serial number to an Asset to specify which item was installed at the Customer Site.

**Parts & Assets Catalog**

To add an Asset to a Customer Site, the item must first be added to the catalog which contains information about the items cost, manufacturer, stock unit type, etc. This is managed from **Billing > Catalogs > Parts and Assets**. For more information, see the Billing > Catalogs section.

**View Asset Status and History**

Add and edit important dates associated with the asset. The status of an asset is determined by comparing the current date to the dates associated with the asset as seen below:

*Date of Purchase:* Manually entered the purchase date of the item.

*Date Installed:* For SMW, this is a manually entered date of installation. For enterprise clients using custom mobile workflows, this can be built into their installation task to automatically update with the installation date.

*Date Last Visited:* Automatically updated from the standard mobile workflow when the asset is serviced. Technicians can choose an "Asset" when adding Services in the SMWs which will automatically update this date every time service is performed on the item.

*Date Decommissioned:* Manually entered date to track when the item was decommissioned and removed.

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## Stock Locations

Stock Locations which are the locations where Parts and Materials are stored. Adding and transferring Parts and Materials from one location to the other can be done from here. Stock Locations must first be added before the inventory can be added.

## Manage Warehouse Locations

Manage (add and edit) the stock locations where Parts and Materials are stored. Provide the contact information and address of the warehouse, which can be used if a tech needs to collect parts or materials as part of a task.

## Manage Trucks as Stock Locations

Users can add to a truck that can then be assigned to individual technicians. Truck locations must be assigned to a technician and take the tech's Home Base address as the address of the truck location.

## View Inventory at a Stock Location

Users can view the Parts and Material inventory at each location.

**Inventory Managing**

**Parts & Material**

**Inventory**

Manage (add, edit, and transfer) Parts and Material at each stock location. When adding Parts, users have the option of either adding parts at the unit level (with individual serial numbers) or adding parts in bulk (without serial numbers).

**Parts & Materials Catalogs**

To add a Part or Material to a stock location, the item must first be added to the catalog which contains information about the items cost, manufacturer, stock unit type, etc. This is managed from **Billing > Catalogs > Parts and Assets or Materials**. For more information, see the Billing > Catalogs section below.
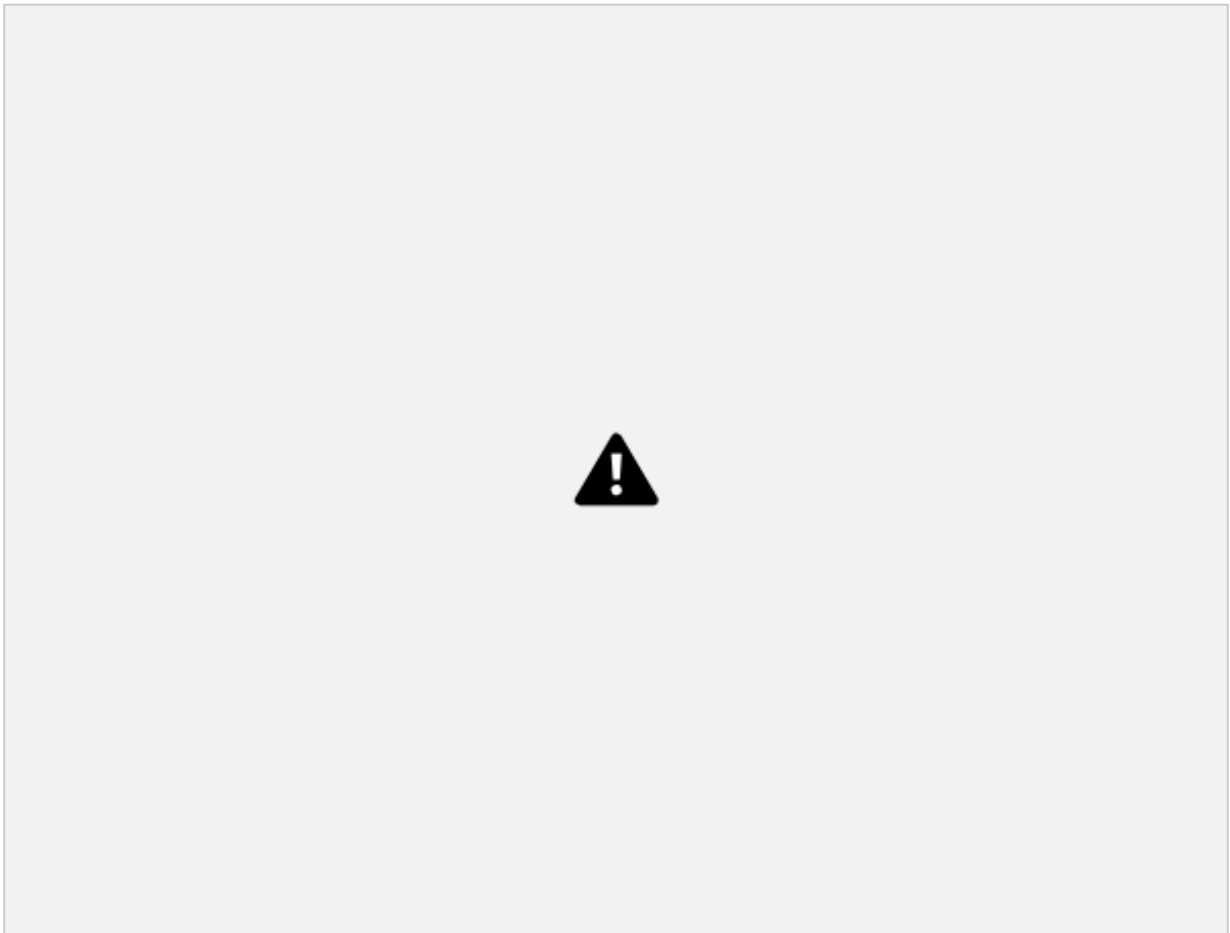
## Add Parts at the Unit Level (with Serial Numbers)

Users can add Parts at the unit level when they want to track the location of individual parts.

## Add Multiple Parts (without Serial Numbers)

Users can add Parts in bulk is useful when it is not necessary to track the individual units.

**Transferring Inventory**

Users can also transfer parts and materials from one Stock Location to another. For example, if a tech is assigned to a Truck, the tech can pick up stock from a warehouse and transfer it to the truck for use during an Installation task.

# Catalogs & Services

## Overview

Manage (add and edit) your catalog of Parts, Assets, and Materials. A record must be added here be fore the item can be added as inventory at a Stock Location or as an Asset at a Customer Site. These records contain information about the items cost, manufacturer, stock unit type etc.

## Parts, Assets & Materials Catalog

Where Catalogs are managed in FSE.

## Manage a Catalog of Parts, Assets & Materials

Manage (add and edit) your catalog of Parts, Assets, and Materials. These records contain information about the items cost, manufacturer, stock unit type, etc.

## Parts/Assets vs Materials

Materials records differ from Parts and Assets in that the Model Number and Manufacturer are often not used and are thus optional fields. Additionally, Materials records do not contain a serial number when added as Inventory.

## Add the Model Number

Add a Model Number to a Part or Asset. Optionally add it to a Material.

## Select the Manufacturer

Define the Manufacturer. This is optional for Material records.

To assign a Manufacturer, it must first be created from the Catalog / Manufacturers module. For more information, see the Manufacturers section below.

## Select a Stock Unit type

Define the unit of measurement used for the item.

To assign a Stock Unit, it must first be created from the Settings / Business Settings / Stock Units module.

## Optionally Select a Default Tax Rates

Define the Tax Rates to assist when billing and invoicing customers or connecting to external ERP systems.

To assign a Tax Rate , it must first be created from the Tax Categories module. For more information, see the Tax Categories section below.
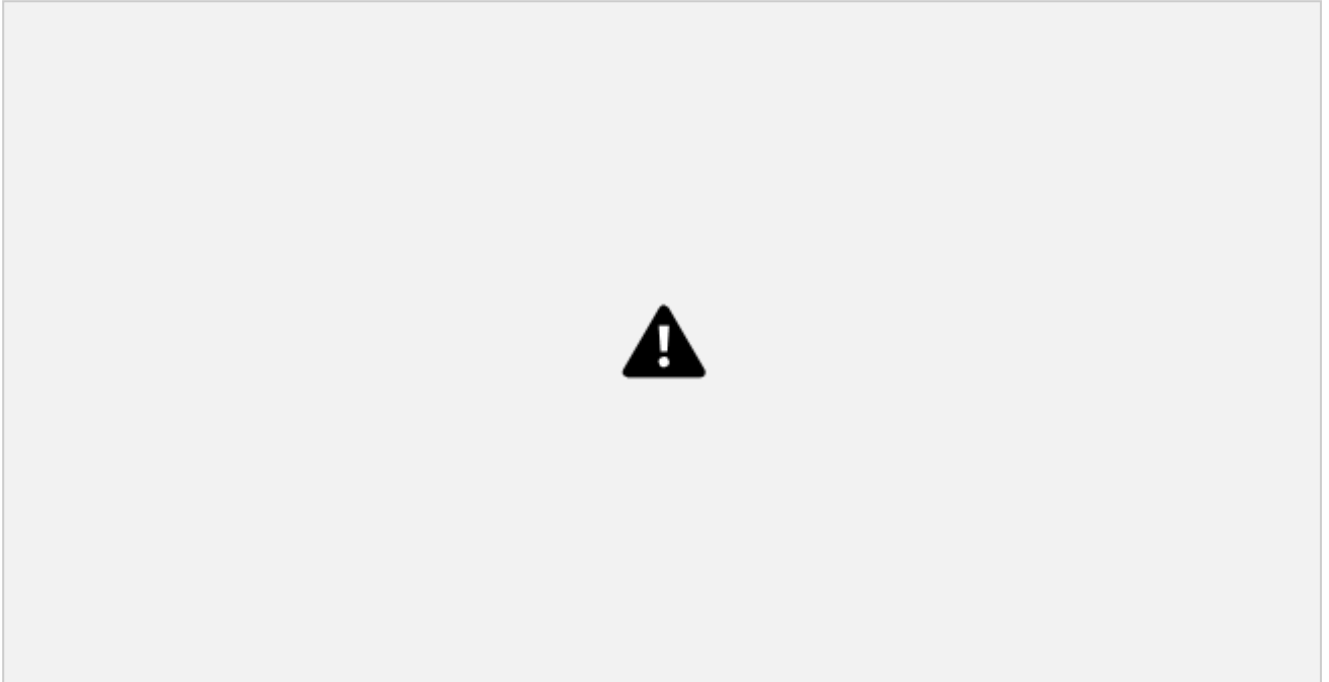
## Optionally Set Default Prices

Give the item a default Purchase Price and default Price Charged to Customer to assist when billing and invoicing customers or connecting to external ERP systems.
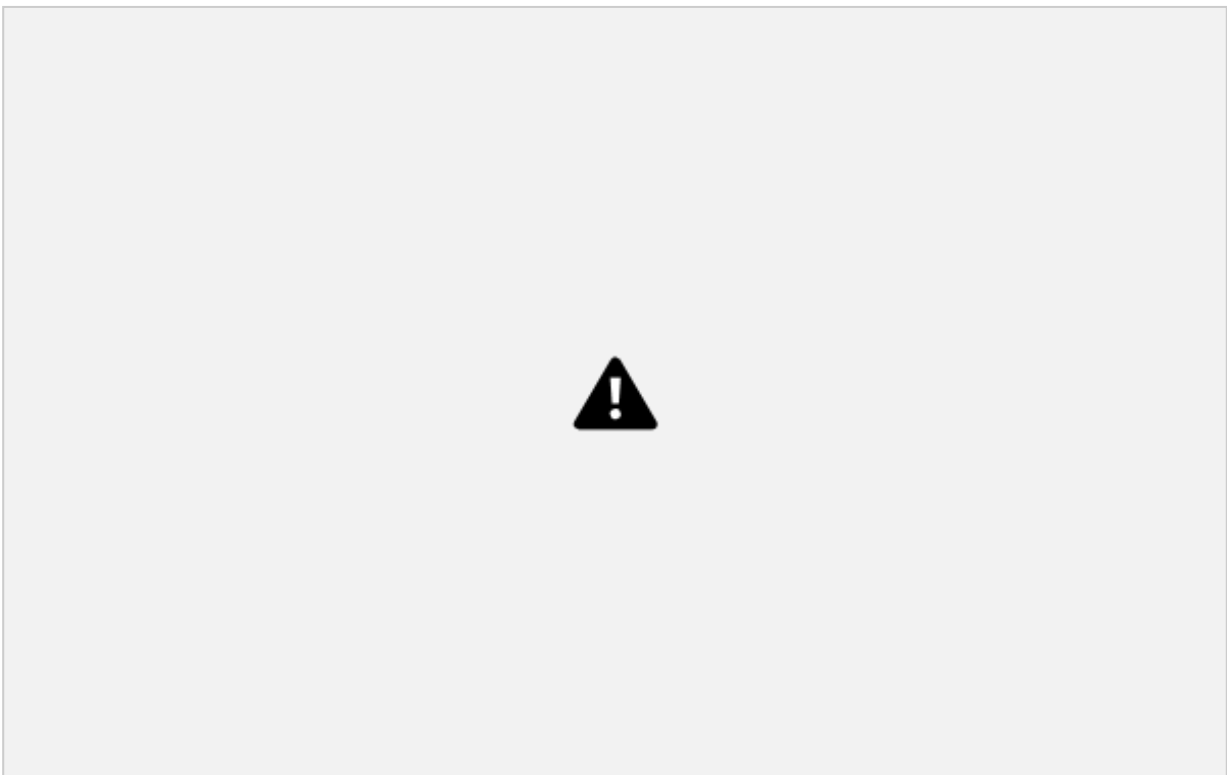
## Manufacturers Catalog

Define (add and edit) a master list of Manufacturers. A record must be added here before the item can be assigned to a Part, Asset, or Material.



## View a List of the Parts and Assets from this Manufacturer

View a list of the Parts & Assets associated with each Manufacturer.



## Services Catalog

Define (add and edit) a master list of Services.

## Manage a Catalog of Services

Services represent are a set of smaller steps for the Technician to follow when performing a task and can be given a monetary value for accounting purposes. Adding the record here allows you to tie a dollar value and tax rate to the Service. Once added, the Service can then be added to a Task Type for use in Work Orders.

## Optionally Define Default Tax Rates

Define the Tax Rates to assist when billing and invoicing customers or connecting to external ERP systems.

In order to assign a Tax Rate, it must first be created from the Tax Categories module. For more information, see the Tax Categories section below.

## Optionally Set a Default Price

Give the item a default Price to assist when billing and invoicing customers or connecting to external ERP systems.