



DRS V5.7 User Guide

Date: July 2019

Doc Version: 1.0

Advanced Computer Software Group Ltd.

www.oneadvanced.com

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1 Terminology

1.1 Aims and objectives

After working through this section you should be able to

- Understand the standard Terms used when talking about DRS

1.2 Overview

Throughout this guide, you will come across Concepts that may not be described fully in their first instance. DRS is a highly interconnected system, and as such, many Concepts and Functions span across multiple areas of the working model. While the following Concepts will each be covered in greater detail throughout the guide, an initial fundamental understanding is needed to gain the most from the learning experience.

1.3 Elements

The Viewing area is made up of a series of Elements. Many of these elements can be configured by the logged in user directly, such as Shortcuts, User Carts and Views, while others are System or User Profile controlled such as Agency, Recent Elements and Tabs.

1.4 Tabs

Tabs are used within DRS to separate the different work streams. The Tabs are located above the Detail Pane and can be seen below.



This vocabulary can be modified so the terms such as 'Orders' & 'Orders' may be different in your setup.

1.5 Views

Views are used across most Tabs in DRS to control the level or type of detail displayed in the Detail Pane. Views can be User defined through the Configuration

Tab, or, User created through the New View option to the left of the View dropdown, or a combination of both.

View : [New view](#)

1.6 Attributes

Attributes are what DRS use to manage all aspects of both the core Scheduling function and the User Experience. Most items within DRS will have one or more Attributes.

1.7 User Cart

The User Cart is an area where the user can bookmark Jobs that they may need to action at a later date. All actions that can normally be completed on a Job can be completed using the bookmark within the User Cart. Once the user no longer needs the Job within their Cart it can be removed.

1.8 Properties

DRS refer to all items which can have scheduled Jobs as Properties. E.g. Property, Meeting Room, Item of Equipment

1.9 Orders

An Order is the Parent Item for a Job. An Order can have one, or many Job types attached to it.

1.10 Jobs

A Job is any single task loaded or scheduled within DRS

1.11 Resources

Resources are linked to Diaries and are the item used within the Scheduling Solution to determine availability and efficiency. All available Resources can be located in the Workers Tab.

1.12 Job Type

DRS can have one, or many different Job Types configured. Job Types are an attribute of a Job. Job Types influence the Scheduling Solution for the Job by imposing a set of criteria on the Scheduler, e.g. Emergency – 1 Day Completion Target, Routine – 20 Day Completion Target

1.13 Agency

Within DRS, an Agency defines the available Properties, Resources and Scheduling Configuration for each given Agency. Your DRS can have one or multiple Agencies defined.

1.14 Diaries

Diaries within DRS are the visual representation of the Scheduled Solution. A User can view one or more diaries at a time and can effect changes directly to the diary, or, determine further information from the diary if needed.

1.15 Planning

Planning is the cumulative function of both Scheduling Jobs and managing the Scheduled Solution of Jobs.

1.16 Planner

A Planner would normally be in charge of monitoring the Planning.

1.17 Shortcuts

Shortcuts can be defined by the user to navigate to commonly viewed Diaries, or Diary Sets.

1.18 Panes

Panes are used within DRS to differentiate between different sets of data which usually will share a common Attribute.

1.19 Filtering

Filtering is a process of limiting the results of a current view using a set of Criteria

1.20 Details Pane

The area covering the lower half of the screen which consists of Searched, Filtered or View Selected details.

1.21 Template

A Job Template is assigned to a single Job when it is loaded in from the Parent System. The Job Template is derived from a series of Parameters held within the Configuration Tab.

2 Common Tasks

2.1 Aims and objectives

After working through this section you should be able to

- Understand the Tasks common to many areas of DRS
- Understand how to use these tasks for future sections

2.2 Views

Views are used across some Tabs in DRS to control the level or type of detail displayed in the Detail Pane. Views can be User defined through the Configuration Tab, or, User created through the New View option to the right of the View dropdown, or a combination of both.

Views are available on the following tabs; Properties, Orders, Jobs, Workers and Planning.

This overview section will discuss how to use views, but if you want to know more or how to configure your own views, please follow the hyperlink below.

[Configure a View](#)

2.2.1 How Views Work

There are three Categories of Views available. These Categories are System, Global and User. Each Category provides a different set of Views which will alter your Details pane accordingly. Your System administrator will determine what is best suited to your Order role.

To select a View, click on the View Dropdown link on any screen where it is available and select your desired pre-configured View.



Once you have selected your View, your details pane will refresh automatically to provide you with the preselected data-set.

To create your own view, click on the New View link to the right of the Dropdown Menu. More information on configuring views can be found [here](#).

[Configure a View](#)



2.3 Filters

Filters are used within DRS to further limit the results returned within the Details pane for a given View or Search Result.

Filters are available on the following Tabs and function in largely the same way; Properties, Orders, Jobs, Workers and Planning. *Note: Some Filtering options may not be available across all Tabs.*



2.3.1 How Filters Work

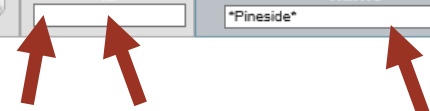
Filters work using a set of User driven Criteria and will always be displayed at the top of the Details pane.

Status filter : All	Time filter : All from today	Worker filter : All				
<input type="checkbox"/>  	PRIMARY ORDER NUM	id	status	time window start	time window end	assignment start

All columns within the selected View can be filtered on. There are also a set of Dropdown System defined filter options including Time, Status and Date which vary based on the Tab selected.

To use a Filter, simply select or enter the values you wish to filter on and the selected View will refresh based on your entry. To refresh the filter view at any time, click the REFRESH icon located to the left of the Filter bar. To clear a Filter, click the RESET button to the right of the REFRESH button.

Status filter : All	Time filter : All since today				
<input type="checkbox"/>  	id	name	contact name	phone number	number
		Pineside			



3 Properties

3.1 Aims and objectives

After working through this section you should be able to

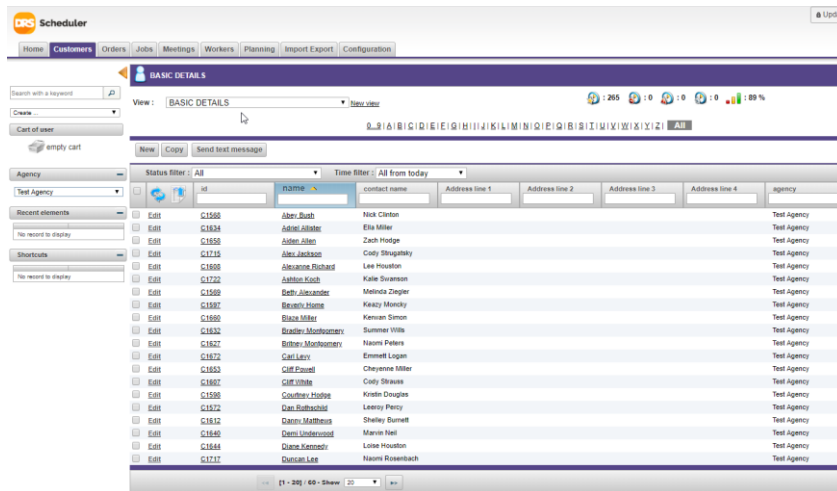
- Quickly find a Property on the system
- View Property Details
- Edit and Amend Property Records
- Navigate around the various screens within Property details

3.2 Finding a Property

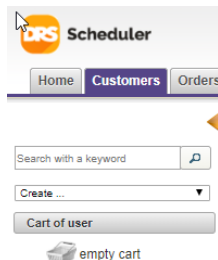
Select

Properties Tab

From the available Tabs along the top of the screen



Enter search criteria in the search field – e.g. Postcode or Street Name



When you are ready, press ENTER or click on the Magnifying Glass icon to search.

Your results will be displayed in the details pane to the right.

Note: The results returned when searching for an Order are based on the Search View configuration. If your search returns no results, you may not have permission to view this detail.

New Copy Send text message

Status filter: All Time filter: All from today

	id	name	contact name	Address line 1	Address line 2
<input type="checkbox"/> Edit	C1568	Abeey Bush	Nick Clinton		
<input type="checkbox"/> Edit	C1634	Adriel Allister	Ella Miller		
<input type="checkbox"/> Edit	C1658	Aiden Allen	Zach Hodge		
<input type="checkbox"/> Edit	C1715	Alex Jackson	Cody Strugatsky		
<input type="checkbox"/> Edit	C1808	Alexanne Richard	Lee Houston		
<input type="checkbox"/> Edit	C1722	Ashlon Koch	Kalie Swanson		
<input type="checkbox"/> Edit	C1589	Betty Alexander	Melinda Ziegler		
<input type="checkbox"/> Edit	C1597	Beverly Home	Keazy Moncky		
<input type="checkbox"/> Edit	C1660	Blaze Miller	Kervan Simon		
<input type="checkbox"/> Edit	C1632	Bradley Montgomery	Summer Willis		
<input type="checkbox"/> Edit	C1627	Britney Montgomery	Naomi Peters		
<input type="checkbox"/> Edit	C1872	Carl Levy	Emmett Logan		
<input type="checkbox"/> Edit	C1853	Cliff Powell	Cheyenne Miller		
<input type="checkbox"/> Edit	C1607	Cliff White	Cody Strauss		
<input type="checkbox"/> Edit	C1598	Courtney Hodge	Kristin Douglas		
<input type="checkbox"/> Edit	C1572	Dan Rothschild	Leeroy Percy		
<input type="checkbox"/> Edit	C1612	Danny Matthews	Shelley Burnett		
<input type="checkbox"/> Edit	C1640	Demi Underwood	Marvin Neil		
<input type="checkbox"/> Edit	C1644	Diane Kennedy	Loise Houston		
<input type="checkbox"/> Edit	C1717	Duncan Lee	Naomi Rosenbach		

<< [1 - 20] / 60 - Show 20 >>

If there are more results than the current selection will display, you can show more results by clicking the dropdown and selecting an appropriate value.

If you have found the property you are looking for, Left Click any value within the result to display the Property Details.

3.3 Viewing Property Details

The first pane within the Property Details shows the current configured and validated address and details for the Property.

Edit Send text message Cancel

<p>Customer</p> <p>Temporary: Unsub</p> <p>id: C1024</p> <p>Name: Adam C. Babin</p> <p>Email:</p> <p>Contact name: Eric Miller</p> <p>Phone number: 5754791240</p> <p>Agency: Test Agency</p> <p>Created: 25/04/2018 13:01:31</p>	<p>Address</p> <p>Address: 27 Elm Lane</p> <p>5750 RCP Allen Springs</p> <p>Opening hours</p> <p>No opening hours defined</p> <p>Closing days calendar</p> <p>Calendar</p> <p>Prefored workers</p> <p></p> <p>Mandatory workers</p> <p></p> <p>Forbidden workers</p> <p></p>
---	--

Edit Send text message Cancel

In the Panes below the Property Details pane, you can view other important related information about the Property, such as Raised Orders, Raised Jobs and Scheduled Unavailability's.

Send text message Cancel

Customer

Template: **Default**

Id: **17183**

Name: **John F. Doe**

Phone: **555-555-5555**

Contact name: **John Doe**

Phone number: **555-555-5555**

Agency: **Test Agency**

Meeting: **no**

Last action date: **2019-01-01 10:00:00**

Address

Address: **21 Park Lane**

City: **210 KOT Hill Drive**

Opening hours

No opening hours defined

Closing days calendar

Calendar

Preferred workers

Mandatory workers

Forbidden workers

EDR Send text message Cancel

Orders New Delete Send text message

Status filter: **All** Time filter: **All from today**

Id	Order No.	Time window start	Time window end	Assignment start	Assignment end	Order Comments	Address	Postcode	Id	Template name	Last action date	Last action login	Agency	Contact name	TASKS DATE
1	17183	02/05/2019 02:00 PM	02/05/2019 03:30 PM	02/05/2019 03:30 PM	02/05/2019 04:30 PM	Vehicle position at arrival point to be used as reference for the task	21 Park Lane	210 KOT Hill Drive	17183	Default	02/05/2019 11:51 PM	john.doe@test	Test Agency	John Doe	02/05/2019 12:00 AM

Send contact text message Send worker text message

Jobs New Copy Change template Delete Show scheduler Suspect View planning Schedule now! Lock Manual assignment Reassign Add to cart User Queue Create Follow Up Update Task Status Update Comments Update Contact Details Send Operative Job

Status filter: **All** Time filter: **All from today**

Id	PRIMARY ORDER NUM	Id	Status	Time window start	Time window end	Assignment start	Address	Assigned workers	Template name	TASK_COMPLETION_STAT
1	17183	17183	planned	02/05/2019 02:00 PM	02/05/2019 03:30 PM	02/05/2019 03:30 PM	21 Park Lane	John Doe	Default	02/05/2019 12:00 AM

These items you will learn about in future sections. For more details now, click the hyperlink below.

[Learn more about ORDERS Now](#)

[Learn more about JOBS Now](#)

4 Orders

4.1 Aims and objectives

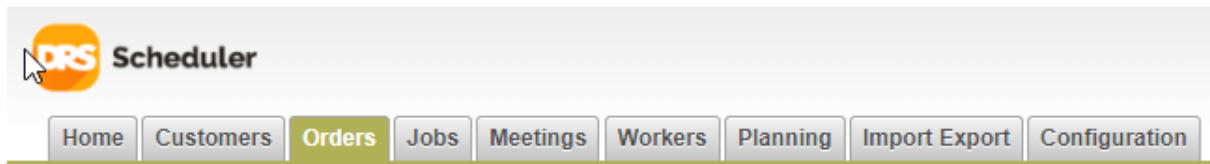
After working through this section you should be able to

- Quickly find an Order on the system
- View Order Details
- Navigate around the various screens within Orders

4.2 Getting Started with Orders

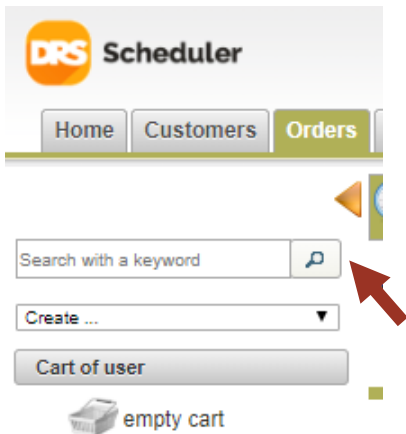
Orders are what DRS uses as a Parent Object to group related Jobs. An Order can consist of one or many Jobs or Job Types.

To view the Orders Screen click on the ORDERS Tab.



4.3 Searching for an Order

Enter search criteria in the search field – e.g. Order Number or Property ID



When you are ready, press ENTER or click on the Magnifying Glass icon to search.

Your search results will be displayed in the details pane to the right.

Note: The results returned when searching for an Order are based on the Search View configuration. If your search returns no results, you may not have permission to view this detail.

<div> <div>New</div> <div>Delete</div> <div>Send text message</div> </div>							
Status filter: All		Time filter: All from today					
<input type="checkbox"/>	id	Order No.	time window start	time window end	assignment start	assignment end	ORDER COMMENTS
<input type="checkbox"/>	Edit Del	S1025	30/03/2019 11:00 PM	06/04/2019 11:00 PM			Morbi gravida turpis orci ut sit sed enim orci et tristique. Est sed dolor.
<input type="checkbox"/>	Edit Del	S1026	30/03/2019 11:00 PM	06/04/2019 11:00 PM	04/04/2019 01:29 PM	04/04/2019 03:07 PM	Eu eu egestas eu auctor eros ante. At arcu enim. Convallis nisi maecenas.
<input type="checkbox"/>	Edit Del	S1027	30/03/2019 11:00 PM	06/04/2019 11:00 PM	02/04/2019 10:50 AM	02/04/2019 12:47 PM	Luctus facilisis aliquam quis bibendum suspendisse. Leo euismod. Sed dui.
<input type="checkbox"/>	Edit Del	S1028	30/03/2019 11:00 PM	06/04/2019 11:00 PM	01/04/2019 01:33 PM	01/04/2019 02:32 PM	Consequat at aliquam sed ante hendrerit ut ac dignissim adipiscing fringilla.
<input type="checkbox"/>	Edit Del	S1029	30/03/2019 11:00 PM	06/04/2019 11:00 PM	05/04/2019 09:40 AM	05/04/2019 11:16 AM	Imperdiet ut purus imperdiet et posuere faucibus tempus quis egestas pellentesque.
<input type="checkbox"/>	Edit Del	S1030	30/03/2019 11:00 PM	06/04/2019 11:00 PM	01/04/2019 02:50 PM	01/04/2019 04:13 PM	Auctor neque vestibulum convallis vitae primis luctus diam aliquam orci.
<input type="checkbox"/>	Edit Del	S1031	30/03/2019 11:00 PM	06/04/2019 11:00 PM	01/04/2019 09:23 AM	01/04/2019 11:13 AM	Maecenas posuere velit donec risus cubilla convallis. Imperdiet erat velit.
<input type="checkbox"/>	Edit Del	S1032	30/03/2019 11:00 PM	06/04/2019 11:00 PM	01/04/2019 11:04 AM	01/04/2019 11:45 AM	Quis laoreet facilisis ornare in gravida aliquam maximus consequat eleifend.
<input type="checkbox"/>	Edit Del	S1033	30/03/2019 11:00 PM	06/04/2019 11:00 PM	01/04/2019 09:37 AM	01/04/2019 10:32 AM	Fames pulvinar egestas nisi malesuada elit nec. Morbi cursus. Velit. Tellus.
<input type="checkbox"/>	Edit Del	S1034	30/03/2019 11:00 PM	06/04/2019 11:00 PM	04/04/2019 10:28 AM	04/04/2019 12:01 PM	Amet efficitur facilisis aliquam aliquam ante. Ut. In massa nam gravida.
<input type="checkbox"/>	Edit Del	S1035	30/03/2019 11:00 PM	06/04/2019 11:00 PM	03/04/2019 02:23 PM	03/04/2019 03:23 PM	Nisi dolor lectus velit in id a adipiscing laoreet. Egestas mauris pretium.
<input type="checkbox"/>	Edit Del	S1036	30/03/2019 11:00 PM	06/04/2019 11:00 PM	02/04/2019 10:58 AM	02/04/2019 12:27 PM	Pretium sed vestibulum enim sodales erat neque aliquam. Sit fermentum praesent.
<input type="checkbox"/>	Edit Del	S1037	30/03/2019 11:00 PM	06/04/2019 11:00 PM	02/04/2019 01:00 PM	02/04/2019 02:45 PM	Sed cursus dolor ut aenean magna vitae suspendisse enim cursus ac scelerisque.
<input type="checkbox"/>	Edit Del	S1038	30/03/2019 11:00 PM	06/04/2019 11:00 PM	03/04/2019 01:23 PM	03/04/2019 02:24 PM	Diam consectetur urna laoreet vel ex. Vitae placerat amet nunc mauris mi.
<input type="checkbox"/>	Edit Del	S1039	30/03/2019 11:00 PM	06/04/2019 11:00 PM	04/04/2019 10:07 AM	04/04/2019 10:59 AM	A laoreet ultrices faucibus tincidunt nisi ac risus convallis ut elementum.
<input type="checkbox"/>	Edit Del	S1040	30/03/2019 11:00 PM	06/04/2019 11:00 PM	01/04/2019 09:19 AM	01/04/2019 10:49 AM	Ultricies ex quam commodo leo turpis et. Ligula turpis sed vel lorem quis.
<input type="checkbox"/>	Edit Del	S1041	30/03/2019 11:00 PM	06/04/2019 11:00 PM	03/04/2019 08:08 AM	03/04/2019 09:22 AM	Sed sed id tortor interdum nisi volutpat. Odio eget. Purus laoreet ut odio.
<input type="checkbox"/>	Edit Del	S1042	30/03/2019 11:00 PM	06/04/2019 11:00 PM	04/04/2019 03:43 PM	04/04/2019 05:11 PM	Rutrum nisi nisi adipiscing et pellentesque eu a hendrerit mollis dolor.
<input type="checkbox"/>	Edit Del	S1043	30/03/2019 11:00 PM	06/04/2019 11:00 PM	04/04/2019 10:44 AM	04/04/2019 12:41 PM	Netus egestas nec volutpat ut posuere est. Eit praesent nisi euismod fusce.
<input type="checkbox"/>	Edit Del	S1044	30/03/2019 11:00 PM	06/04/2019 11:00 PM	02/04/2019 01:13 PM	02/04/2019 02:33 PM	Dapibus luctus erat faucibus ut tortor volutpat velit tempus tincidunt.

If there are more results than the current selection will display, you can show more results by clicking the dropdown and selecting an appropriate value.

If you have found the property you are looking for, Left Click any value within the result to display the Order Details.

4.4 Viewing Order Details

The first pane within the Order Details shows header information for the Task received from the Parent System.

<div> <div>Edit</div> <div>Schedule the order</div> <div>Unlock and schedule the order</div> <div>Cancel</div> </div>	
<div>Order</div> <div> <div>Template: No template</div> <div>Id: S1028</div> <div>Name:</div> <div>Contact name: Karl Travis</div> <div>Phone number: 07401598318</div> <div>Agency: Test Agency</div> <div>Same worker in sequence: <input type="checkbox"/></div> <div>Last action date: created - DataGenerator - Rydegh Adams - 30/03/2019 23:00:45</div> </div>	<div>Customer</div> <div> <div>Customer Id: S1001</div> <div>Customer name: Fanny Sampson</div> </div>
<div>Properties</div> <div> <div>MESSAGE: NOT SET</div> <div>PRIMARY_ORDER_NUM: C990-530</div> <div>TARGET_DATE: 06/04/2019 00:00</div> <div>ORDER_COMMENTS: Eu eu egestas eu auctor eros ante. At arcu enim. Convallis nisi maecenas.</div> <div>PRIORITY: PRIORITY: 1</div> <div>STATUS: PLANNED</div> </div>	<div>Address</div> <div>Address: 20 San Carlos Street 1987 2444 Perth</div>
	<div>Opening hours</div> <div>No opening hours defined</div>
	<div>Preferred workers</div>
	<div>Mandatory workers</div>
	<div>Forbidden workers</div>

In the Panes below the Order Details pane, you can view other important related information about the Order, such as associated Jobs.

[Edit](#)
[Schedule the order](#)
[Unlock and schedule the order](#)
[Cancel](#)

Order

Template: No template
M: 8100
Name:
Contact name: Paul Terry
Phone number: 0745 855110
Agency: Test Agency
Same worker in sequence: ☐
Last update date: created: DataGenerator_BldgApp Adams_2019/09/19 12:30:45

Customer

Customer ID: 63301
Customer name: Pirey Bortoni
Address:
Address: 20 Rue Garbo, Street
Tel: 2044 Pirey

Properties

MESSAGE: NOT SET
PRIMARY_ORDER_NUM: 000290
INVOIC_DATE: 09/04/19 00:00
ORDER_COMMENT: Suivi agencier au sujet d'un site. Aider en m. Comptable et mesurer.
PRIORITY: PRIORITY
STATUS: PLANNED

Opening hours

No opening hours defined

Preferred workers

Mandatory workers

Forbidden workers

[Edit](#)
[Schedule the order](#)
[Unlock and schedule the order](#)
[Cancel](#)

[New](#)
[Copy](#)
[Change template](#)
[Delete](#)
[Show scheduler](#)
[Suspend](#)
[View planning](#)
[Schedule now](#)
[Lock](#)
[Manual assignment](#)
[Reassign](#)
[Add to cart](#)
[Clear Queue](#)
[Create Follow On](#)
[Update Task Status](#)
[Update Comments](#)
[Update Contact Details](#)

[Send Operator Job](#)
[Send contact text message](#)
[Send worker text message](#)

Status filter: All Time filter: All from today

	PRIMARY_ORDER_NUM	id	status	time window start	time window end	assignment start	Address	assigned workers	template name	TASK_COMPLETION_STAT
No record to display										

[New](#)
[Copy](#)
[Change template](#)
[Delete](#)
[Generate instances](#)
[Delete instances](#)
[Manual assignment](#)

	PRIMARY_ORDER_NUM	id	status	time window start	time window end	assignment start	Address	assigned workers	template name	TASK_COMPLETION_STAT
No record to display										

From here you can manage and manipulate the associated Jobs including Scheduling Jobs to Diaries, this you will learn about in future sections. If you would like to know more now, click the hyper link below.

[Learn more about JOBS now](#)

5 Jobs

5.1 Aims and objectives

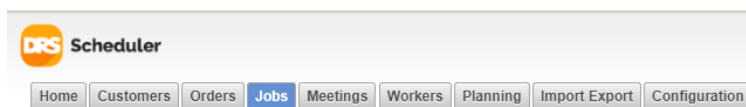
After working through this section you should be able to

- Quickly find a Job on the system
- View Job Details
- Edit and Amend Job Records
- Schedule a Job
- Change a Job Template
- Lock a Job
- Navigate around the various screens within Jobs

5.2 Getting Started with Jobs

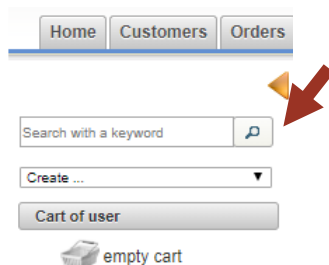
Jobs are the single items that DRS is using to create a Scheduling Solution for the Resource Diaries.

To view the available Jobs, select the JOBS Tab.



5.3 Searching for a Job

Enter search criteria in the search field – e.g. Job Number or Property ID



When you are ready, press ENTER or click on the Magnifying Glass icon to search.

Your search results will be displayed in the details pane to the right.

Note: The results returned when searching for a Job are based on the Search View configuration. If your search returns no results, you may not have permission to view this detail.

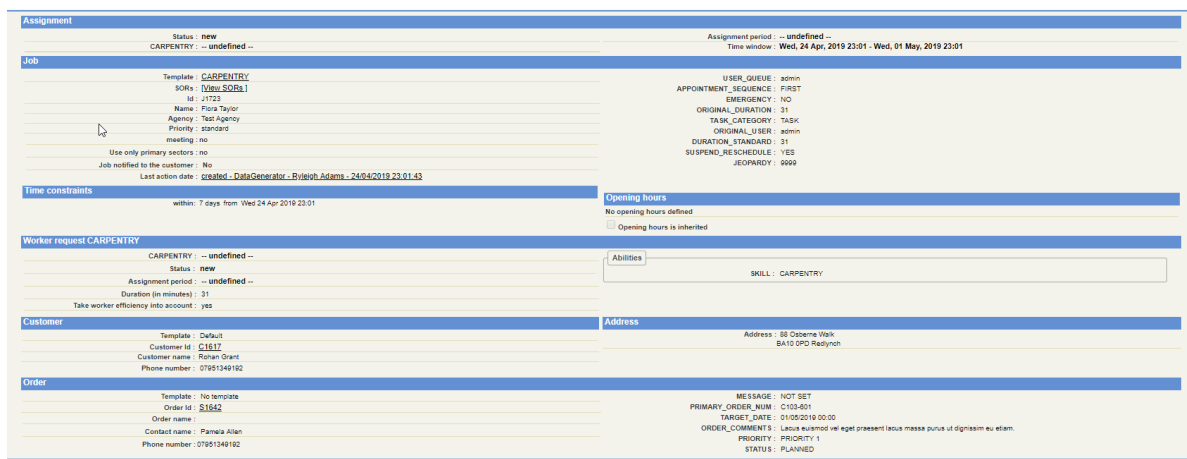
Status filter : All		Time filter : All since today		Operative filter : All			
<input type="checkbox"/>		id	name	status	assignment start	assignment end	postcode
<input type="checkbox"/>	Edit Del	J2343	A001517	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2344	A001518	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2345	A001519	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2347	A001521	new			OX14 2DQ
<input type="checkbox"/>	Edit Del	J2348	A001523	new			RG18 0TX
<input type="checkbox"/>	Edit Del	J2351	A001526	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2352	A001527	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2365	A001542	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2370	A001548	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2371	A001549	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2375	A001553	new			BH1 4HY
<input type="checkbox"/>	Edit Del	J2377	A001556	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2381	A001574	new			BS15 BEG
<input type="checkbox"/>	Edit Del	J2754	A001627	new			BH10 6AJ
<input type="checkbox"/>	Edit Del	J2787	A002150	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2788	A002151	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2789	A002152	new			RG8 7JT
<input type="checkbox"/>	Edit Del	J2800	A002154	new			BH1 4HY
<input type="checkbox"/>	Edit Del	J2791	A002176	planned	05/02/2016 02:19 PM	05/02/2016 03:19 PM	OX7 5DG
<input type="checkbox"/>	Edit Del	J2792	A002182	new			OX7 5GY

If there are more results than the current selection will display, you can show more results by clicking the dropdown and selecting an appropriate value.

If you have found the property you are looking for, Left Click any value within the result to display the Order Details.

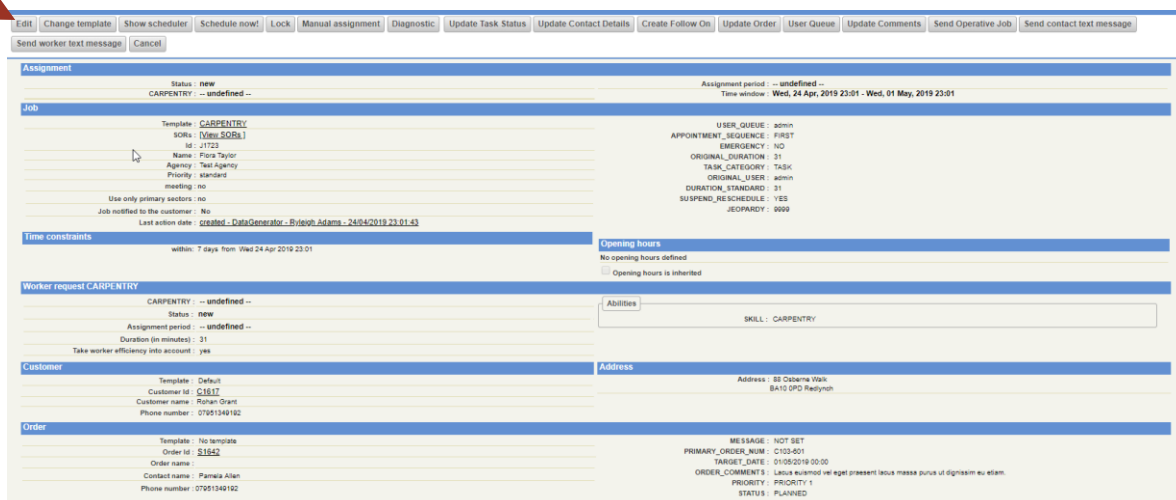
5.4 Viewing Job Details

The Job Details pane is broken up in to many sections each with its own heading. The information displayed on this pane is a combination of details loaded in from the Parent system, such as Property Details and Primary Order Number and system generated data such as Template and Assignment Periods.

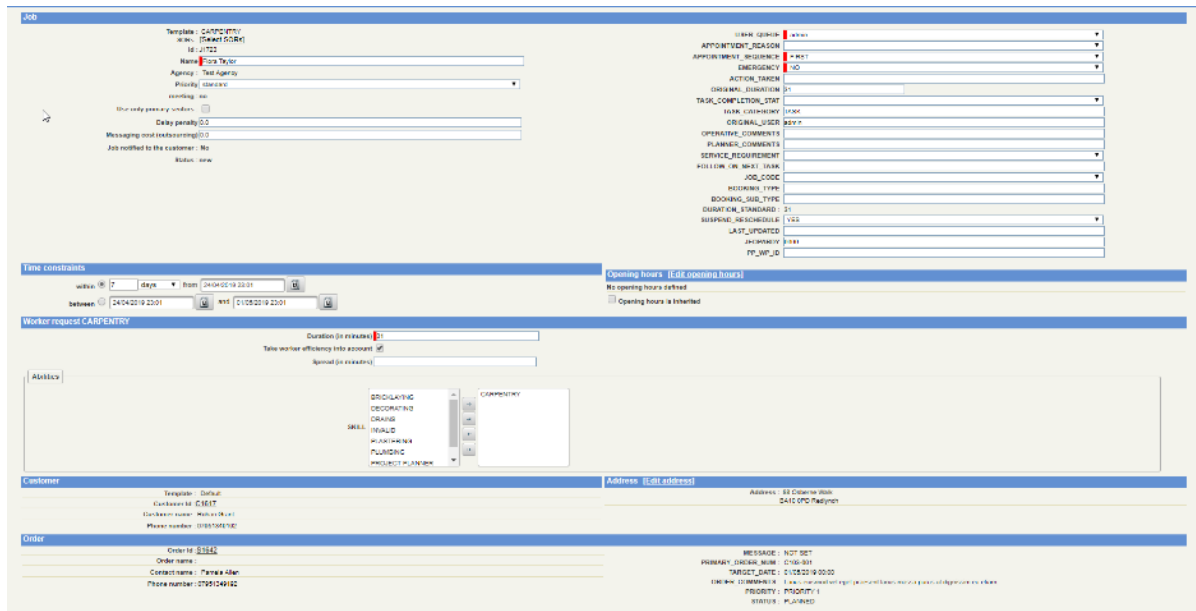


5.5 Editing Job Details

Click on the EDIT button to unlock the fields for editing.



From here, you can edit the available fields as required. You may not have permissions to edit all fields; your System Administrator will determine what your Order role requires.



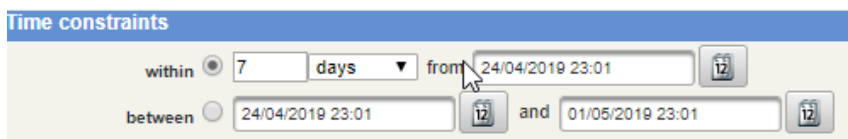
Note: All fields marked with a RED Collar are MANDATORY.

Once you have completed your changes, click SAVE to commit, SAVE AND SCHEDULE to commit and schedule your Job, or, if you would like to revert to previously saved data, click CANCEL.

5.5.1 Amending a Planning Window

DRS uses a concept of a Planning Window when it is performing its Scheduling solution to determine the Time Constraints the Job must conform to.

If you require to extend the Planning Window for any reason, you can do so from the EDIT Job screen.

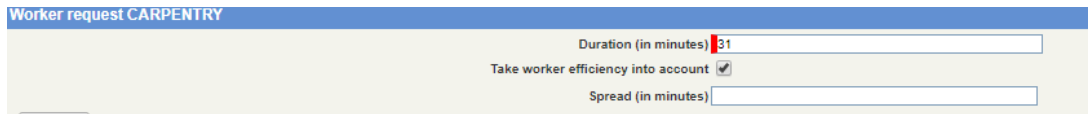


Amend these values to suit your requirements.

NOTE: You may not have access to this functionality. Your System Administrator will determine what access your Job role requires.

5.5.2 Amending Job Duration

Job Duration is the time (in minutes) DRS is using to determine the available Planning Slots during the Scheduling solution. To increase or decrease Duration of the Job, amend the Duration (in minutes) value within the Job Edit screen.



NOTE: You may not have access to this functionality. Your System Administrator will determine what access your Job role requires.

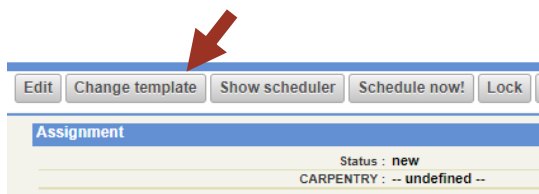
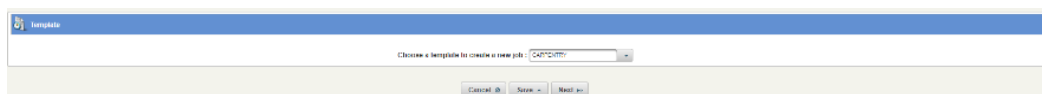
5.6 Amending the Job Template

A Job Template is assigned to a single Job when it is loaded in from the Parent System. The Job Template is derived from a series of Parameters held within the Configuration Tab.

The Job Template determines which Resources can be assigned to the Job during the Scheduling Solution.

The Job Template can be modified, providing the Scheduling Solution with a new resource group if required.

To Amend the Job template, Click CHANGE TEMPLATE.

Select your Template using the Dropdown Menu and then click SAVE to return to the Job Details screen for Scheduling, NEXT to enter the JOB EDIT screen or CANCEL to revert your changes and return to the Job Details screen.

5.7 Scheduling a Job

There are three options when scheduling a Job. You can either select **SHOW SCHEDULER** which will display the appointment pads showing availability, this will constrain the Job to the date and timeslot chosen for completion, but not necessarily the resource initially selected.

You can select **SCHEDULE NOW!** This schedules the Job as a “Floating Job” and will appoint the Job in the best known position initially; however, it will give the Job the opportunity to be replanned if a more efficient Scheduling Solution presents itself.

The final option is to select **Manual Schedule** and assign the scheduling result to your set requirements. This can be used to negate the preset scheduling solution.

5.7.1 Show Scheduler

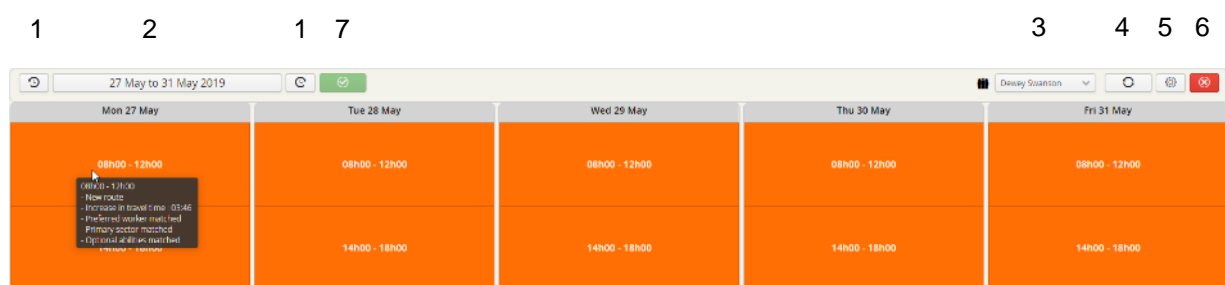
The Show Scheduler option will display Appointment Pads which will allow you to make the best decision when booking in the appointment.

Each Appointment Pad will have a colour corresponding to the total travel time increase incurred by selecting each slot. DRS will determine the best possible choice and this Appointment Pad will flash.

The Colours of the Appointment Pads relate to the increase in Travel Time related to the current Appointment. Green is a negligible or no increase in Global Travel time to complete the Appointment.

Hovering over each Appointment Pad will give you more information regarding the Appointment Slot.

There are several options on the Show Scheduler



Screen.

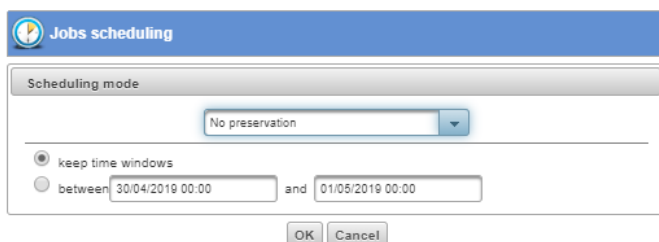
- 1) Move the date period forward or back 1 period (in this case, 5 days)
- 2) Select a specific period by clicking here and choosing your start day. This will show dates based on the number of viewable dates within the period.
- 3) Select a specific worker and then select the Recompute button (4) to refresh the slot selections

- 4) Recompute your selection by changing parameters and selecting this button
- 5) Change your slot selection by selecting this option
- 6) Cancel and return to the Job Detail screen by selecting this option
- 7) Once you have selected your appointment, click on this button to commit the selection.

5.7.2 SCHEDULE NOW!

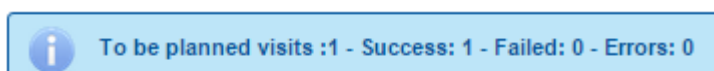
The SCHEDULE NOW! option is best used for floating appointments or appointments where there is no need to specify a timeframe for its completion beyond target date and time of the raised Order.

If you are happy with the Time Windows that is dictated by the priority the Order was raised with, simply click OK and this Order will be scheduled into the best available slot. If you wish to amend the time windows, click the BETWEEN radio button and enter your new values. These values MUST be within the original Time Windows the Order was raised with.



The screenshot shows a 'Jobs scheduling' dialog box. It has a title bar with a gear icon and the text 'Jobs scheduling'. Below the title bar is a 'Scheduling mode' section with a dropdown menu currently set to 'No preservation'. Underneath, there are two radio buttons: 'keep time windows' (which is selected) and 'between'. The 'between' option has two text input fields: the first contains '30/04/2019 00:00' and the second contains '01/05/2019 00:00'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

NOTE: As this will be seen as a Floating Task by DRS, DRS may replan this several times before the Job is finally completed. DRS will always move the Job further towards the End of the Job's Time Window to ensure efficiency but will never bring the Job back towards the Start of the Job's Time Window. DRS will always schedule this work to be completed BEFORE the End of the Order's Time Window.

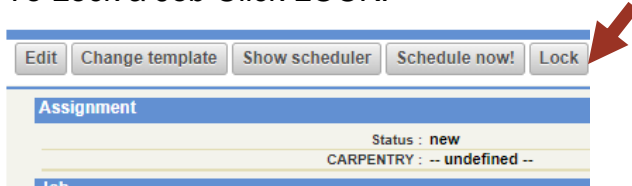


Once the Scheduling has completed, it will indicate its success at the top of the screen.

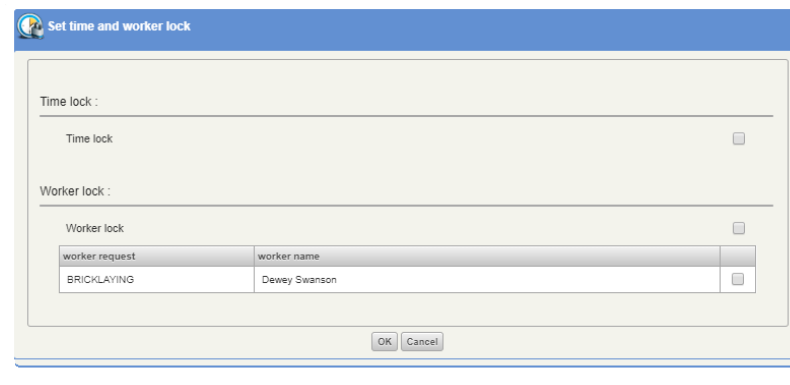
5.8 Locking a Job

Locking a Job is the process of ensuring the Job Scheduling Details are fixed and are not Dynamically Scheduled. You can lock a Job's Resource Allocation or Time Slot, or both.

To Lock a Job Click LOCK.



From here, choose to Time Lock and or Resource Lock by checking the appropriate Check Boxes. You can also amend the Worker Selection by selecting the EDIT link in the WORKER NAME field.

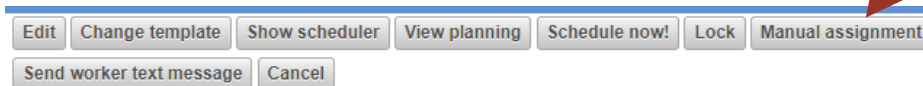


Once you are done, click OK to save your selection of CANCEL to revert back to the previous selection.

5.9 Manual Assignment

Manually Assigning Jobs to Resources allows the Planner to manually select both the Resource and Time Slot for the Job to be completed. This option overrides the Scheduling Solution and manually forces the Job into a Diary.

To Manually Assign a Job, click MANUAL ASSIGNMENT



Three booking modes are available when using Manual Schedule;

- **Free Time Slot setting:** Selecting this will set the value for Time Slot and Appointment Time but not update the Planning Windows. This can allow for replanning via the Scheduling Pads to the original planning window in the future.
- **Slot Setting from Configuration:** Select a Time Window from the Slot Settings assigned to the Job Template
- **Update Planning Window:** Selecting this will set the value for Time Slot, Appointment Time and Update the Planning Window. The result of

this will be that in future reappointment attempts via the Show Scheduler function, you will only be offered availability within the window that you select at this time.

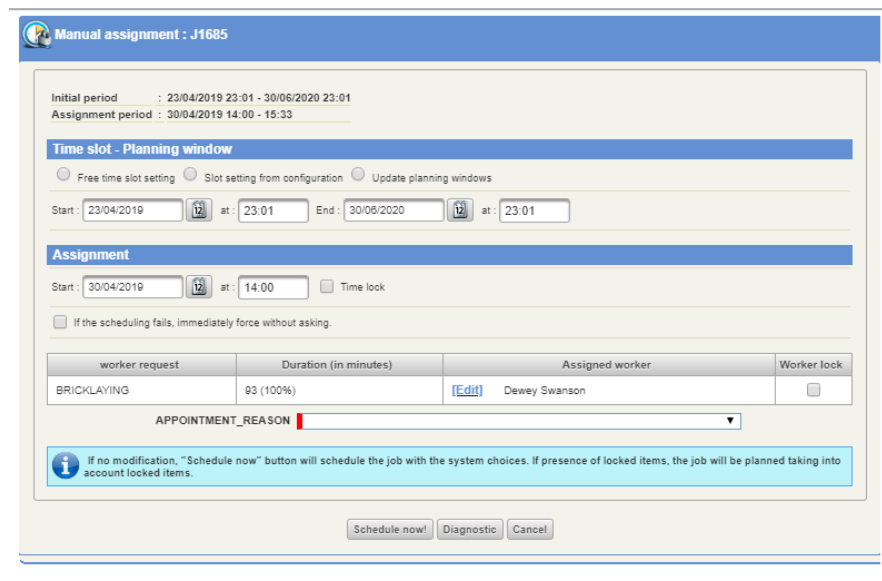
Once your option is selected, select your Time Slot Start and End, this will be used if DRS needs to move your Job to ensure maximum efficiency.

Select your Assignment Start Date and Time, this will be the appointment time for the Job within the Diary. You can also lock the Job to this time at this point.

Bypass the warning messages for Force Scheduling by selecting the option *'If the scheduling fails, immediately force without asking'*

Select your Resource using the EDIT link in the ASSIGNED WORKER field. If left Blank, DRS will assign the most appropriate Worker for this task. If NOT left blank, you can LOCK this Job to the resource by checking the WORKER LOCK check box.

You can also select your APPOINTMENT REASON from this window by selecting a value from the Dropdown box.



Manual assignment : J1685

Initial period : 23/04/2019 23:01 - 30/06/2020 23:01
Assignment period : 30/04/2019 14:00 - 15:33

Time slot - Planning window

☐ Free time slot setting ☐ Slot setting from configuration ☐ Update planning windows

Start : 23/04/2019 at 23:01 End : 30/06/2020 at 23:01

Assignment

Start : 30/04/2019 at 14:00 ☐ Time lock

☐ If the scheduling fails, immediately force without asking.

worker request	Duration (in minutes)	Assigned worker	Worker lock
BRICKLAYING	93 (100%)	[Edit] Dewey Swanson	<input type="checkbox"/>

APPOINTMENT_REASON ▼

! If no modification, "Schedule now" button will schedule the job with the system choices. If presence of locked items, the job will be planned taking into account locked items.

[Schedule now!](#) [Diagnostic](#) [Cancel](#)

To complete the Manual Assignment, select SCHEDULE NOW. This will confirm the Manual Assignment and place the Job within a Diary. Click CANCEL to revert all your changes.

5.10 Progressing a Job

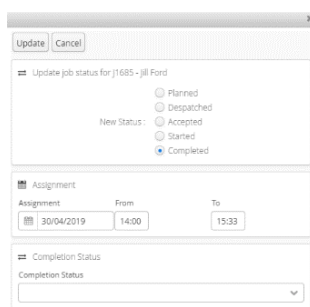
DRS uses Status's to monitor the progress of Jobs. This is called a Lifecycle.

Jobs will naturally move through the Lifecycle to complete throughout the day as they are completed by your Mobile Working Solution.

You can also manually progress a Job through the Lifecycle by clicking UPDATE TASK STATUS.



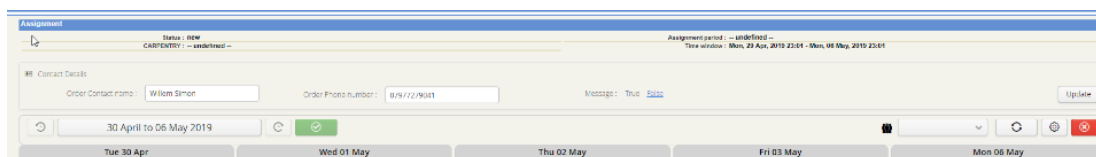
On the following screen, select your required Status, complete any other required information such as Status Change Time and Completion Reason and then click Update. To make no changes, click Cancel.



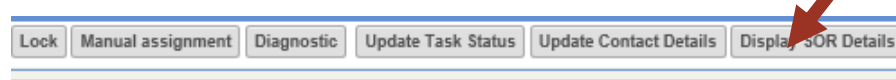
You can now view this Job in the Diary and see the colour change, or, view the status change in the Job Details screen.

5.11 Update Contact Details

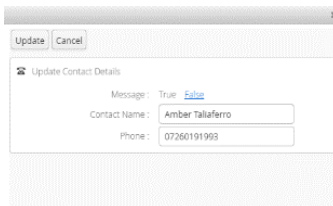
Contact Details can now be amended and Text Messaging can be set at point of scheduling by updating the fields and selecting the appropriate options above the Show Scheduler Scheduling pads



You can also amend the Contact Details and set Text Messaging by clicking the UPDATE CONTACT DETAILS button.



Complete the required fields and select the most appropriate options before clicking UPDATE.



Update Contact Details

Message: ☐ True ☒ False

Contact Name:

Phone:

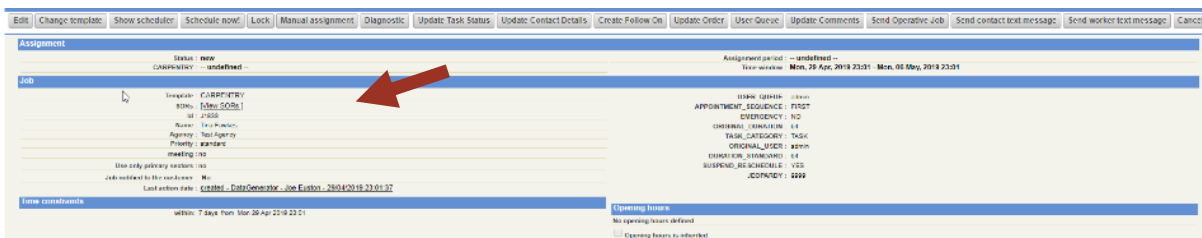
Update Cancel

This will amend the Contact Details displayed on your Mobile Solution, or, printed Run Sheets.

5.12 Display SOR Details

When a Job is loaded into DRS, it is supplied with SOR details from the Parent System. The SOR determines the Template, Duration and Resource allocation for the Scheduling Solution.

To view the Job SOR Details, click VIEW SOR's within the Job Details screen.



Assignment

Status: NEW

Assignment period: -- undefined --

Time window: Mon, 29 Apr, 2019 23:01 - Mon, 05 May, 2019 23:01

Job

Integration: CARPENTRY

Room: [Job SORs]

At: 11:00

Room: 1st Floor

Agency: Test Agency

Priority: standard

meeting: no

Use only primary resources: no

Job added to the schedule: No

Last action date: created - DataConnector - Joe Fulton - 26/04/2019 23:01:37

Time constraints

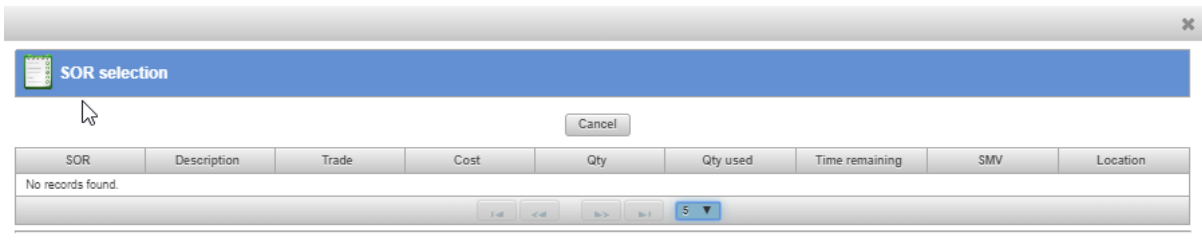
within: 7 days from Mon 29 Apr 23:01:37

Opening hours

No opening hours defined

☐ Opening hours to inherit

Once done, click Cancel



SOR selection

Cancel

SOR	Description	Trade	Cost	Qty	Qty used	Time remaining	SMV	Location
No records found.								

1 of 1 << >> 5

5.13 Follow On's

Follow On's are the function within DRS which allows Users to create child Jobs of existing Jobs. This function is commonly used to manage No Access events within DRS. Your Business Process will dictate whether you raise Follow On's in DRS or your Parent System.

To Create a Follow On click the CREATE FOLLOW ON button.

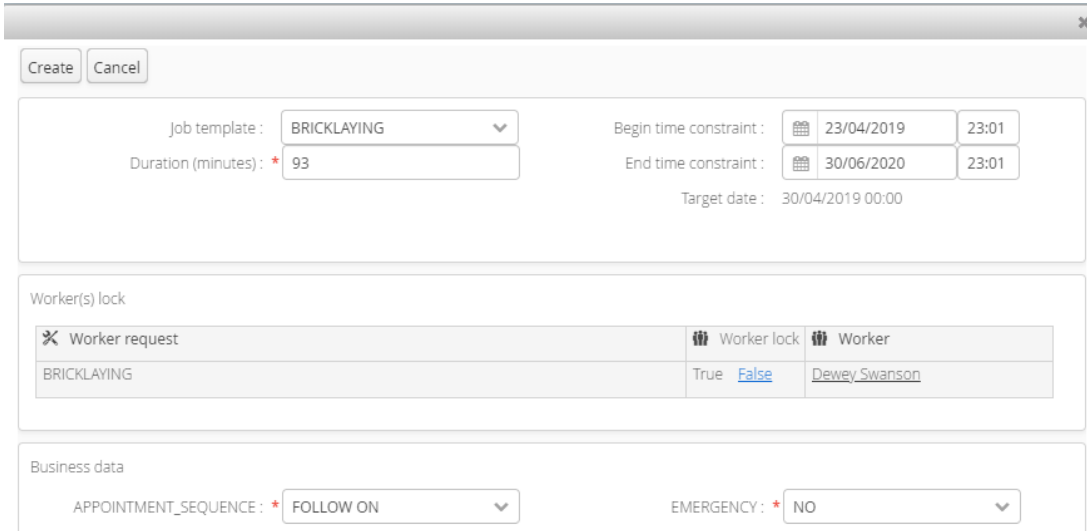


New Copy Change template Delete Show schedules Suspend View planning Schedule now Lock Manual assignment Reassign Add to cart User Queue Create Follow On Update Task Status Update Comments Update Contact Details

Send Operative Job Send contact text message Send worker text message

The selectable fields in this screen are configurable within the Configurations menu.

Complete the fields as required. If you would like the same Worker to return, ensure to select the LOCK option within the Worker pane.



The screenshot shows a job creation form with the following fields and values:

- Job template:** BRICKLAYING (dropdown)
- Duration (minutes):** 93 (text input)
- Begin time constraint:** 23/04/2019 23:01 (calendar and time picker)
- End time constraint:** 30/06/2020 23:01 (calendar and time picker)
- Target date:** 30/04/2019 00:00 (text input)
- Worker(s) lock:**

Worker request	Worker lock	Worker
BRICKLAYING	True False	Dewey Swanson
- Business data:**
 - APPOINTMENT_SEQUENCE:** FOLLOW ON (dropdown)
 - EMERGENCY:** NO (dropdown)

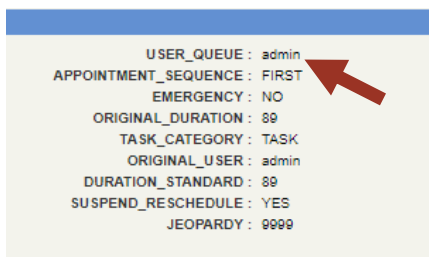
Once complete, select CREATE to create and schedule the follow on. If you would like to back out of your changes, click CANCEL.

5.14 User Queues

User Queues within DRS are used to organise Jobs into containers that can be filtered on or viewed directly through a configured View. Commonly, Queues will be used to organise Jobs by Planner or Trade, but this is not the exclusive case.

User Queues are now a configurable attribute within the Object Attribute configuration within DRS. It is also modifiable and will update as new values are passed into it.

You can view the current User Queue for a Job within the Job Details Pane.

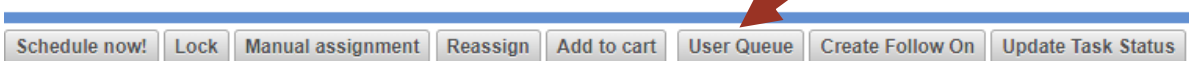


The screenshot shows the Job Details Pane with the following information:

- USER_QUEUE : admin
- APPOINTMENT_SEQUENCE : FIRST
- EMERGENCY : NO
- ORIGINAL_DURATION : 89
- TASK_CATEGORY : TASK
- ORIGINAL_USER : admin
- DURATION_STANDARD : 89
- SUSPEND_RESCHEDULE : YES
- JEOPARDY : 0000

A red arrow points to the USER_QUEUE value.

To change the User Queue, click USER QUEUE

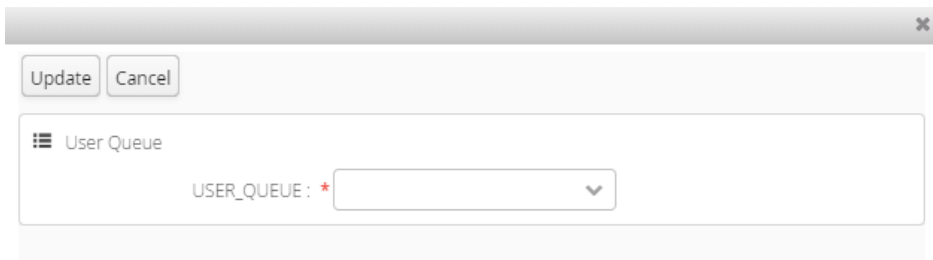


The screenshot shows the Job Details Pane with the following buttons:

- Schedule now!
- Lock
- Manual assignment
- Reassign
- Add to cart
- User Queue
- Create Follow On
- Update Task Status

A red arrow points to the User Queue button.

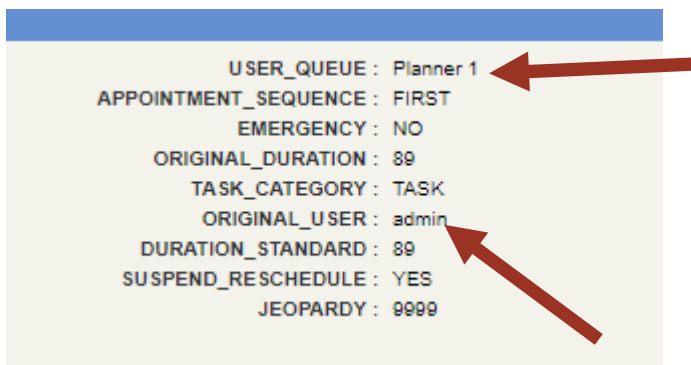
Select the required Queue from the Dropdown List



The screenshot shows a dialog box titled "User Queue" with a close button (X) in the top right corner. At the top left are "Update" and "Cancel" buttons. Below them is a label "User Queue" next to a list icon. The main field is labeled "USER_QUEUE : *" and contains a dropdown menu with a downward arrow.

Select Update to commit the change or CANCEL to revert to previous selections.

You can now see that the Job has been configured to the New Queue.



The screenshot displays job configuration details. A red arrow points to the line "USER_QUEUE : Planner 1", indicating the new queue. Another red arrow points to the line "ORIGINAL_USER : admin", which is the old queue name.

```
USER_QUEUE : Planner 1
APPOINTMENT_SEQUENCE : FIRST
EMERGENCY : NO
ORIGINAL_DURATION : 89
TASK_CATEGORY : TASK
ORIGINAL_USER : admin
DURATION_STANDARD : 89
SUSPEND_RESCHEDULE : YES
JEOPARDY : 9999
```

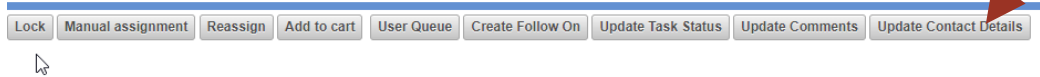
The Old Queue can be seen here.

5.15 Job Comments

From within the Job Details tab, you can place comments on the Job which can be seen by all those with access to DRS, Mobile Workers and Run Sheet users.

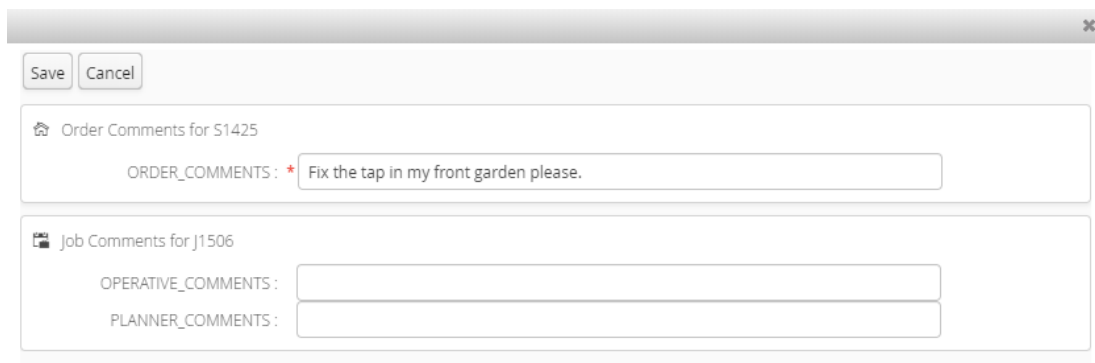
Any field can now be marked as a Comments field and updatable using this function by setting the appropriate configuration within the Object Attribute.

To review and update Comments on a Job, Select **UPDATE COMMENTS**



Order Comments will be populated with any comments loaded from your Parent System.

Planner and Operator comments can be added for further information. If configured, these comments will be delivered to your Mobile Devices.

A screenshot of a web form titled 'Job Comments for J1506'. At the top, there are 'Save' and 'Cancel' buttons. Below them, there are three sections for comments. The first section is 'Order Comments for S1425' and contains a text input field with the value 'Fix the tap in my front garden please.' The second section is 'Job Comments for J1506' and contains two text input fields, one for 'OPERATIVE_COMMENTS' and one for 'PLANNER_COMMENTS'.

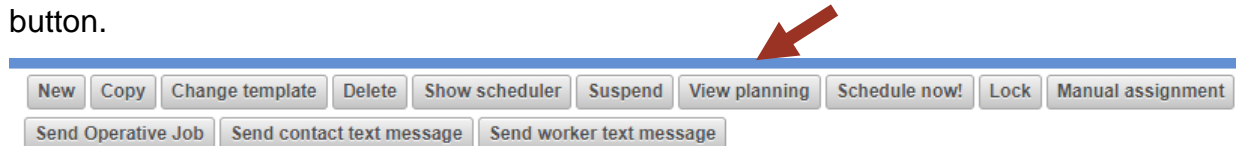
Once done, click **SAVE** to save your comments, or **CANCEL** to exit without saving.

5.16 Other Jobs Functions

5.16.1 Suspend Jobs

Suspending a Job will place the selected Job on hold until released. Suspended Jobs will not schedule until actioned. Suspended Jobs are still counted in the “New” Job count.

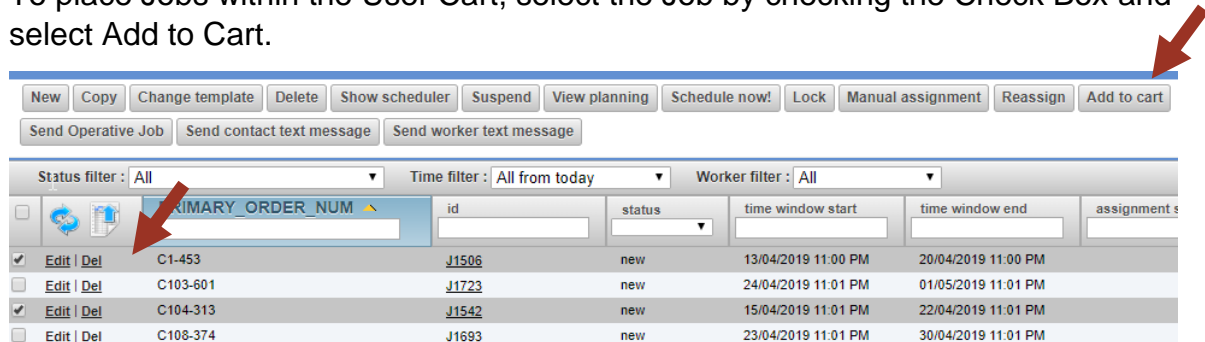
Suspend a Job by selecting the job from the details pane and clicking the SUSPEND button.



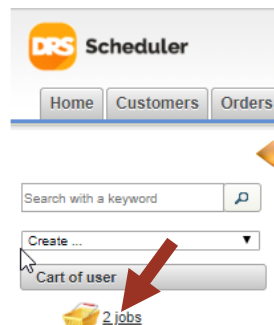
5.16.2 Add to Cart

The User Cart is an area where the user can place bookmarks Jobs that they may need to action at a later date. All actions that can normally be completed on a Job can be completed using the bookmark within the User Cart. Once the user no longer needs the Job within their Cart it can be removed.

To place Jobs within the User Cart, select the Job by checking the Check Box and select Add to Cart.

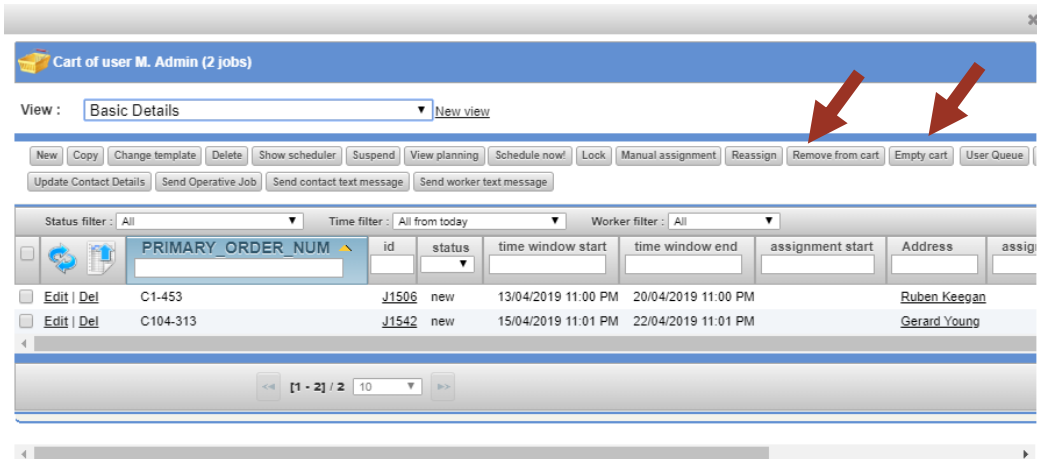


This will update the User Cart accordingly.



To access the detail within the User Cart click on the link by the icon.

From within the Cart you can action Jobs as you would normally. When you no longer need sight of the Jobs, use the Remove from Cart button to clear them from your Cart. If you would like to remove all Jobs from your Cart, select Empty Cart.



PRIMARY ORDER NUM	id	status	time window start	time window end	assignment start	Address	assign
C1-453	J1506	new	13/04/2019 11:00 PM	20/04/2019 11:00 PM		Ruben Keegan	
C104-313	J1542	new	15/04/2019 11:01 PM	22/04/2019 11:01 PM		Gerard Young	

Note: You may need to change the view within your Cart to see your Jobs.

6 Workers

6.1 Aims and objectives

After working through this section you should be able to

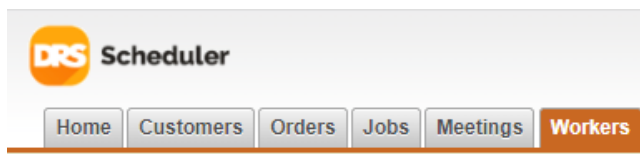
- Quickly find an Worker on the system
- View Worker Details
- Edit and Amend Worker Details
- Navigate around the various screens within Worker Details

6.2 Getting Started with Workers

Workers or Resources are the assets that DRS uses within its Scheduling Solution to plan and allocate Jobs to. A Worker or Resource can have one or many Attributes and these Attributes dictate the availability for the Scheduling Solution to allocate Jobs to the Worker.

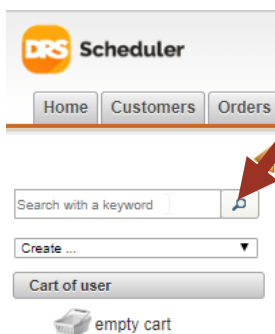
Select

Workers Tab



6.3 Finding a Worker

Enter search criteria in the search field – e.g. First Name, Last Name



When you are ready, press ENTER or click on the Magnifying Glass icon to search.

Your results will be displayed in the details pane to the right.

Note: The results returned when searching for an Order are based on the Search View configuration. If your search returns no results, you may not have permission to view this detail.

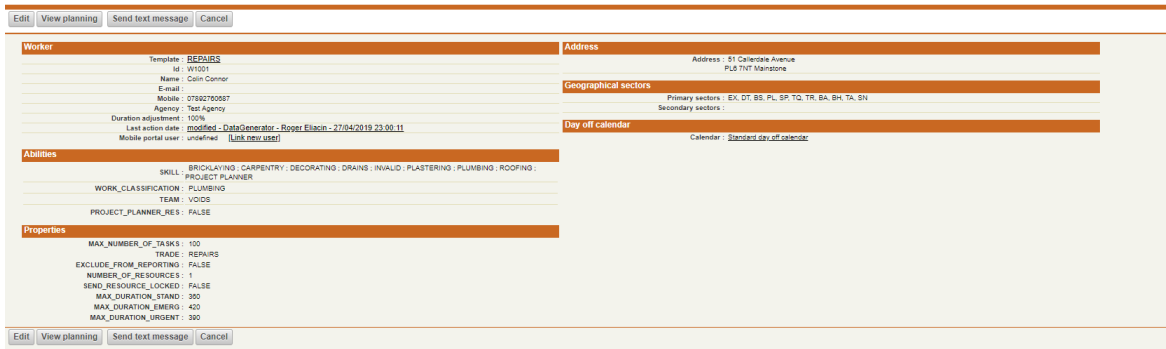
New Copy Delete View planning 30/04/2019 Reports Task Despatch Interface Absence Confirmation Set Planning Fence Daily Unavailabilities Send text message							
	id	name	TRADE	mobile phone	MOBILE_DEVICE_TYPE	MOBILE_PHONE_TYPE	EMPLOYEE_CODE
<input type="checkbox"/>							
<input type="checkbox"/> Edit Del	W1004	Andrew Dotto	test for andrew				
<input type="checkbox"/> Edit Del	W1001	Colin Connor	REPAIRS	07892760687			
<input type="checkbox"/> Edit Del	W1003	Dewey Swanson	REPAIRS	07918946445			
<input type="checkbox"/> Edit Del	W1002	Fergus Lloyd	REPAIRS	07335862457			
<input type="checkbox"/> Edit Del	W1000	Roger Keivnes	REPAIRS	07440542588			
<input type="checkbox"/> Edit Del	W203	XMBRACETEST	BRICKLAYING		MESSAGING		

If there are more results than the current selection will display, you can show more results by clicking the dropdown and selecting an appropriate value.

If you have found the Worker you are looking for, Left Click any value within the result to display the Worker Details.

6.4 Viewing Worker Details

The first pane within the Worker Details shows the Attributes for the selected Worker.



The screenshot shows the 'Worker Details' form for worker 'BEPUBS'. The form is divided into several sections:

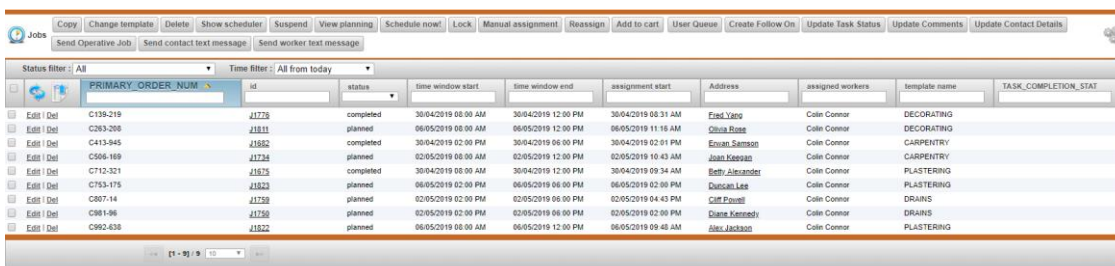
- Worker Information:** Template: BEPUBS, Id: WH001, Name: Colin Connor, E-mail: , Mobile: 0789270057, Agency: Test Agency, Duration adjustment: 100%, Last action date: modified - DataGenerator - Rover Elain - 27/04/2019 23:05:11, Mobile portal user: undefined, [Link new user].
- Address:** Address: 51 Canetide Avenue, PL8 7UT Mansford.
- Geographical sectors:** Primary sectors: EX, DT, BS, PL, SP, TO, TR, BA, BH, TA, SN; Secondary sectors: .
- Day off calendar:** Calendar: Standard day off calendar.
- Abilities:** SKILL: BRICKLAYING, CARPENTRY, DECORATING, DRAINS, INVALID, PLASTERING, PLUMBING, ROOFING; WORK_CLASSIFICATION: PLUMBING; TEAM: VOICE; PROJECT_PLANNER_RE: FALSE.
- Properties:** MAX_NUMBER_OF_TASKS: 100; TRADE: REPAIRS; EXCLUDE_FROM_REPORTING: FALSE; NUMBER_OF_RESOURCES: 1; SEND_RESOURCE_LOCKED: FALSE; MAX_DURATION_STAND: 300; MAX_DURATION_EMERG: 420; MAX_DURATION_URGENT: 300.

The Lower display panes show any Jobs allocated to the Worker, current or past, the configured Working Hours Calendar and any Unavailability's that the Worker may currently have.

From here you can perform various tasks associated with Jobs and Unavailability's. Each task is covered in more detail elsewhere in the document. Please follow the hyperlinks if you wish to learn more now.

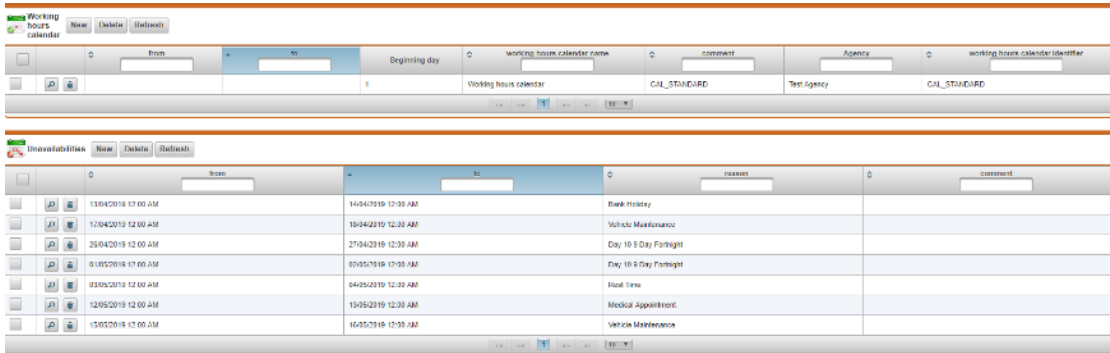
[Learn more about Worker Planning Now](#)

[Learn more about Worker Unavailability's Now](#)



The screenshot shows a table of jobs allocated to the worker. The table has columns for PRIMARY_ORDER_NUM, id, status, time window start, time window end, assignment start, Address, assigned workers, template name, and TASK_COMPLETION_STAT.

PRIMARY_ORDER_NUM	id	status	time window start	time window end	assignment start	Address	assigned workers	template name	TASK_COMPLETION_STAT
C135-219	417726	completed	30/04/2019 08:00 AM	30/04/2019 12:00 PM	30/04/2019 08:31 AM	East View	Colin Connor	DECORATING	
C263-205	418111	planned	06/05/2019 08:00 AM	06/05/2019 12:00 PM	06/05/2019 11:16 AM	Oliver Road	Colin Connor	DECORATING	
C413-845	418582	completed	30/04/2019 08:00 PM	30/04/2019 06:00 PM	30/04/2019 02:01 PM	Evans Samson	Colin Connor	CARPENTRY	
C566-169	417734	planned	02/05/2019 08:00 AM	02/05/2019 12:00 PM	02/05/2019 10:43 AM	Joan Knapton	Colin Connor	CARPENTRY	
C712-321	418625	completed	30/04/2019 08:00 AM	30/04/2019 12:00 PM	30/04/2019 09:34 AM	Beth Alexander	Colin Connor	PLASTERING	
C753-175	418623	planned	06/05/2019 08:00 PM	06/05/2019 06:00 PM	06/05/2019 02:00 PM	Duncan Lee	Colin Connor	PLASTERING	
C807-14	417738	planned	02/05/2019 02:00 PM	02/05/2019 06:00 PM	02/05/2019 04:43 PM	Cliff Proust	Colin Connor	DRAINS	
C981-96	417738	planned	02/05/2019 02:00 PM	02/05/2019 06:00 PM	02/05/2019 02:00 PM	Diane Kennedy	Colin Connor	DRAINS	
C982-638	418622	planned	06/05/2019 08:00 AM	06/05/2019 12:00 PM	06/05/2019 09:45 AM	Alan Jackson	Colin Connor	PLASTERING	



The screenshot shows two sections of the DRS interface. The top section is titled 'Working hours calendar' and contains a table with columns for 'from', 'to', 'beginning day', 'working hours calendar name', 'comment', 'Agency', and 'working hours calendar identifier'. The bottom section is titled 'Unavailability' and contains a table with columns for 'from', 'to', 'reason', and 'comment'. Both tables have a list of dates and times in the 'from' column, and the 'reason' column in the 'Unavailability' section contains various entries like 'Bank Holiday', 'Vehicle Maintenance', 'Day 10 9 Day Forfeit', 'Play 10 9 Day Forfeit', 'Hool time', 'Medical Appointment', and 'Vehicle Maintenance'.

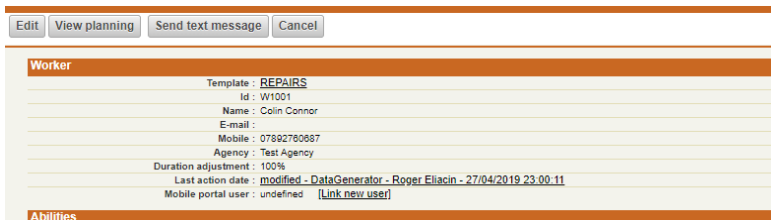
6.5 Editing Worker Attributes

A Worker can consist of one or many Attributes. These Attributes provide DRS with the parameters it needs to successfully complete a Scheduling Solution on a Job.

The Attributes that can be configured to a Worker are determined by those which are configured within the Configuration Menu. While some of these Attributes are System Attributes, many can be created or configured to be tailored to your business needs.

To Edit Worker Attributes, click EDIT within the Worker Details screen.

NOTE: You may not have access to this functionality. Your System Administrator will determine what access your Order role requires



The screenshot shows the 'Worker Details' screen. At the top, there are four buttons: 'Edit', 'View planning', 'Send text message', and 'Cancel'. The 'Edit' button is highlighted with a red arrow. Below the buttons, the 'Worker' section displays the following information: Template: REPAIRS, Id: W1001, Name: Colin Connor, E-mail: 07992790697, Mobile: 07992790697, Agency: Test Agency, Duration adjustment: 100%, Last action date: modified - DataGenerator - Roger Eliacin - 27/04/2019 23:00:11, and Mobile portal user: undefined. There is a link '(Link new user)' next to the mobile portal user field. Below the Worker section is the 'Abilities' section.

6.5.1 Worker Details and Sectors

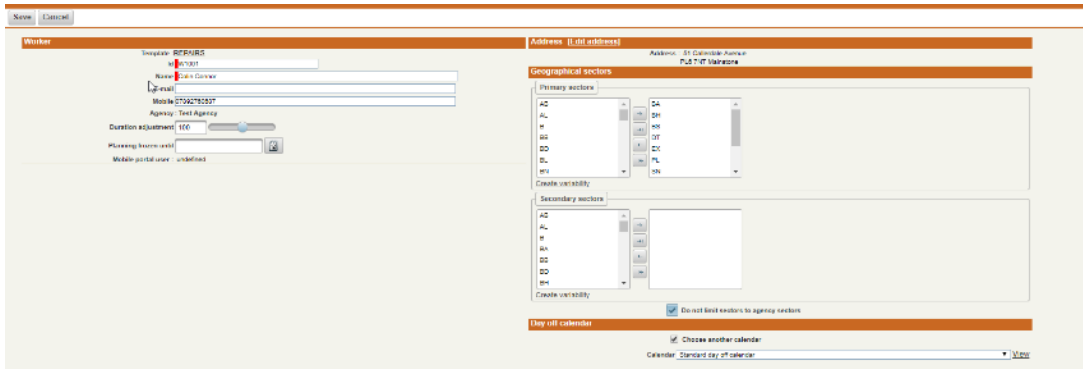
The first details pane contains basic Worker details including the Worker ID and Name. Once the Worker ID is set, this should not be modified without contacting Kirona Support.

Duration Adjustment is an efficiency modifier which will increase or decrease the total length of any Planned Job to the Worker based on their competency to complete the tasks they are given.


The Address Postcode is the location at which DRS will attempt to Start and End the Worker on a given Work Day. It is recommended that this is an outlying postcode for a Sector the Worker has assigned to them which is closest to their Home Address.

The Geographical Sectors options dictate which areas Planned Jobs will be allocated to the Worker from.

In the case of Multi-Agency configurations, operatives can now be assigned sectors which are configured to other agencies if required. This option should only be selected after consulting your Kirona Account Manager or Kirona Consultant.



Worker

Image:  Name: Mobile: Agency: Duration adjustment: Planning resource: Mobile portal user:

Address (Edit address)

Address: **Geographical sectors**

Primary sectors

AC	SA
AL	SH
AT	ST
AS	SC
AD	SL
DL	SN
BT	

Secondary sectors

AC	
AL	
AT	
AS	
AD	
DL	
BT	

☐ Do not send workers to agency sectors

Choose another calendar

☒ Choose another calendar

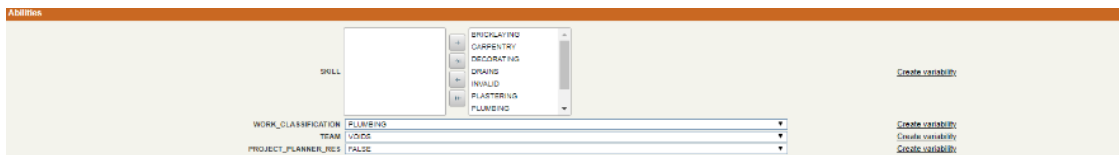
Calendar: [View](#)

6.5.2 Abilities

Attributes configured within the Abilities pane dictate which SOR codes can be allocated to the Worker. SOR codes are attached to Templates within DRS which are assigned Attributes configured within your Worker Template.

For a Job to be allocated to a Worker, the configuration Template matched to the Schedulable SOR must match the configuration of the Worker.

Your configuration may have more or less options within this section.

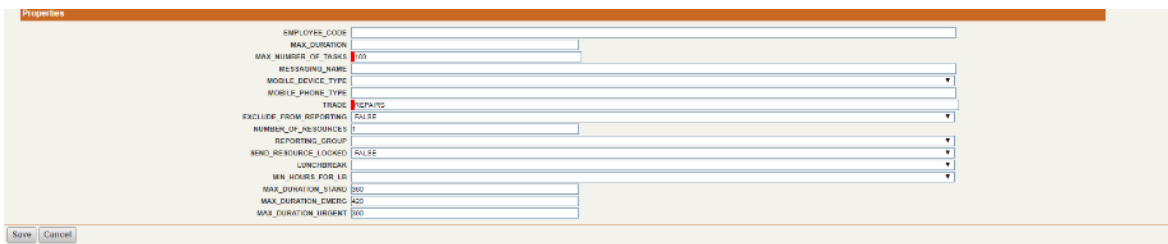


6.5.3 Properties

The Properties Pane holds values which will be used in both Planning and Filtering of the Worker. These values control many aspects of how your Worker will react to certain Planning and Searching or Viewing tasks.

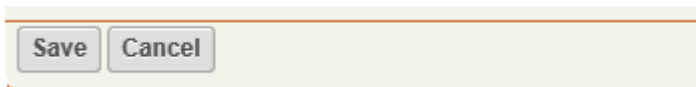
As this list is heavily customisable, your list may not look like the list below. It is advisable that you understand the configured options for your Worker Properties before making any major changes.

Please contact Support if you are in any doubt before making any changes.



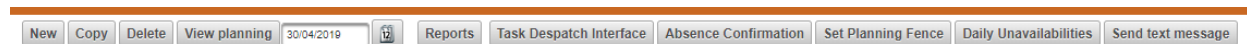
6.5.4 Save or Cancel

Once you have completed your changes, click SAVE to retain them. All other selections including CANCEL will revert all changes to previously saved values.



6.6 Worker Functionality

Within the Worker Tab there are many functions you can perform to one or many Workers or Resources. These are accessed through the buttons along the top of the Worker Details Pane.



6.6.1 New, Copy, Delete

These buttons perform the tasks as they are named. They will allow you to create a New Worker, which is a similar task to Editing and existing Worker, to Copy an existing Worker to a New Worker Resource or to Delete one, or more, Workers.

Workers should ONLY be deleted if the scheduling data, historic, present and future is no longer needed. This function is NON-RECOVERABLE.

6.6.2 View Planning

This buttons will allow you to view Planning Diary for the date selected to the right of the button for one or more Workers. Planning Diaries are discussed in more detail elsewhere in the document. To learn more now, follow the hyperlink below.

[Viewing Planning](#)

6.6.3 Reports

Worker Reports will allow you to produce Run Sheets and other useful reports for a single date or date range. Reports are discussed in more detail elsewhere in the document. To learn more now, follow the hyperlink below.

[Worker Reports](#)

6.6.4 Task Dispatch Interface

The Task Dispatch Interface will progress a single or many Jobs to Dispatched, thereby locking the Job to both Time and Resource at the time of execution. This function will also commonly export an Allocation File or WebServices Call to the Parent system. This allows the Parent System to know which resource is allocated to a given Job.

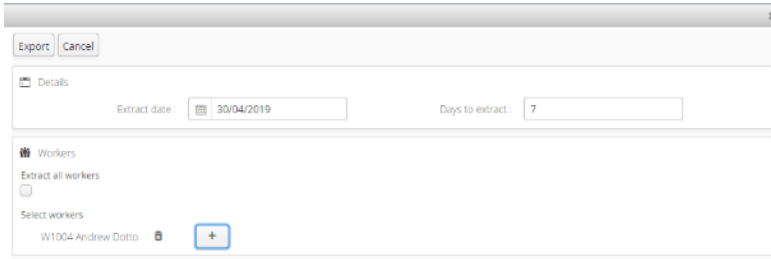
The Task Dispatch Interface is discussed in more detail elsewhere in the document. To learn more now, follow the hyperlink below.

[Task Dispatch Interface](#)

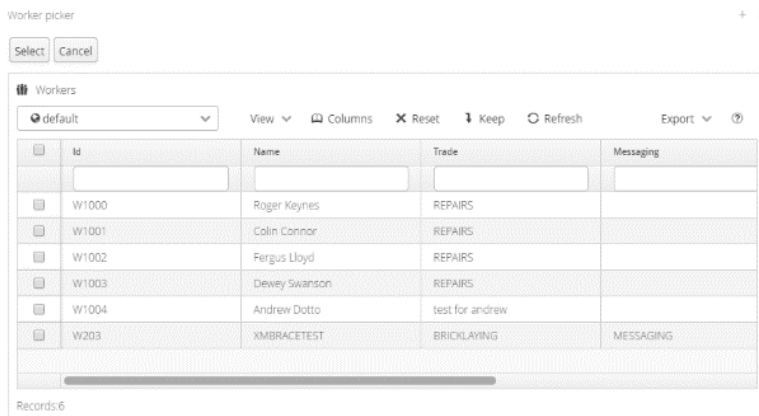
6.6.5 Absence Confirmation

The Absence Confirmation option allows you to export the unavailability for a single, multiple or defined group of Workers for a given period.

To create this report, select a WORKER and then click ABSENCE CONFIRMATION.

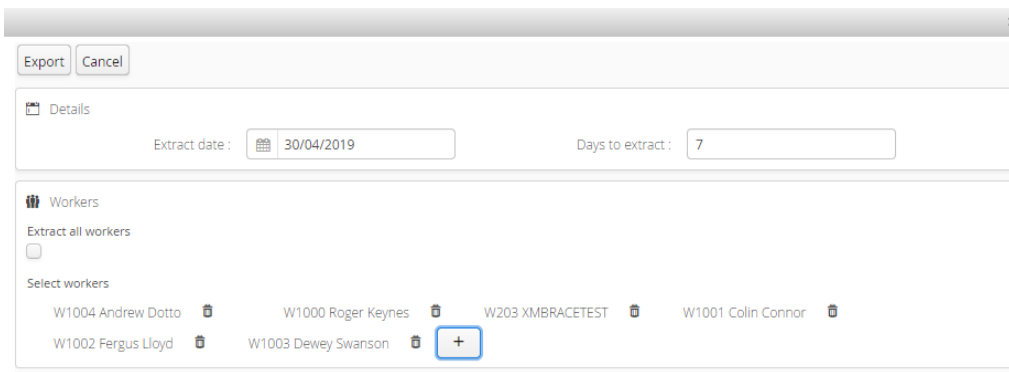


Add further workers by clicking the + button



Id	Name	Trade	Messaging
W1000	Roger Keynes	REPAIRS	
W1001	Colin Connor	REPAIRS	
W1002	Fergus Lloyd	REPAIRS	
W1003	Dewey Swanson	REPAIRS	
W1004	Andrew Dotto	test for andrew	
W203	XMBRACETEST	BRICKLAYING	MESSAGING

Select your workers and then click the SELECT button.



Set your Criteria on the following screen and then select EXPORT. To exit from the window without committing, select CANCEL.

6.6.6 Set Planning Fence

Setting the Planning Fence for a given date will stop DRS from appointing any New jobs or dynamically re-scheduling Jobs which occur prior to the selected date. This function is commonly used in conjunction with Run Sheets and the Task Dispatch

Interface where selected Jobs are handed out ahead of their Scheduling Window and cannot be moved for business reasons.

The Planning Fence is discussed in more detail elsewhere in the document. To learn more now, follow the hyperlink below.

[Setting a Planning Fence](#)

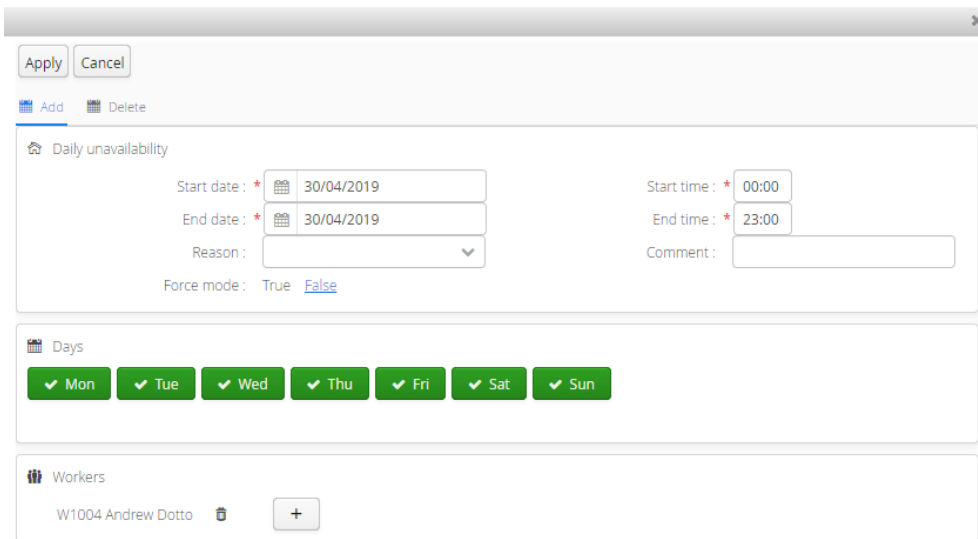
6.6.7 Daily Unavailability's

The Daily Unavailability's function allows you to put in multiple unavailability's for multiple resources with a single function.

Selecting Add or Delete will change the options available to complete.

Add workers to be edited by clicking the + button and then set your options before selecting APPLY.

If you enter details in the COMMENTS field, this will show when hovering over the Unavailability in the Diary view.



The screenshot shows a web form titled "Daily unavailability" with a close button (X) in the top right corner. At the top are "Apply" and "Cancel" buttons. Below these are "Add" and "Delete" tabs, with "Add" currently selected. The form contains several input fields: "Start date" and "End date" (both set to 30/04/2019), "Start time" (00:00) and "End time" (23:00), a "Reason" dropdown menu, and a "Comment" text area. There is also a "Force mode" section with "True" and "False" options, where "False" is highlighted. Below the main form is a "Days" section with buttons for each day of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun), all of which have a checkmark. At the bottom is a "Workers" section showing a list of workers, currently displaying "W1004 Andrew Dotto" with a trash icon and a "+" button to add more workers.

If you wish to cancel this task at any time, click CANCEL.

7 Planning

7.1 Aims and objectives

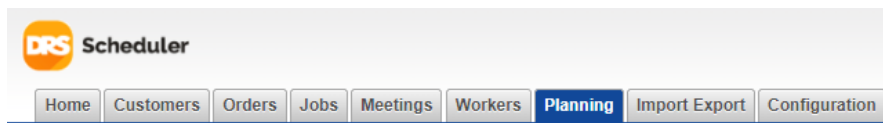
After working through this section you should be able to

- Quickly view Worker Diaries in DRS
- Create Shortcuts to your regularly viewed diaries
- Use tools such as the Planning Fence and Task Dispatch Interface
- Manage, Edit and Modify Diaries
- Run Worker Reports
- Navigate around the various screens within Planning

7.2 Getting Started with Planning

The Planning Tab in DRS shares many of the same functions with the Workers Tab, with the difference that the information derived from the Planning Tab will help you understand Worker Load on a single or multiple basis by viewing the Planning Diaries.

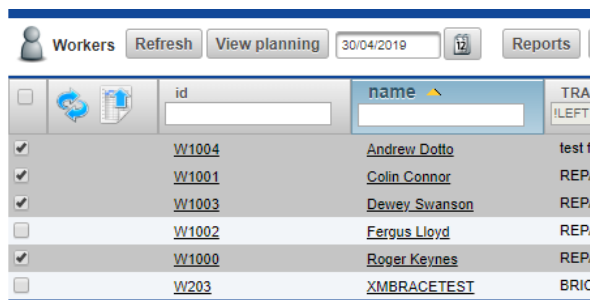
To access the Planning Tab,
Click the PLANNING tab.



7.3 Viewing the Diaries

Viewing the Diaries allows you to see a visual representation of the Scheduling Solution as at the date you select.

To view the Diaries, first select the resources you wish to view and then click VIEW PLANNING.



7.4 Diary Elements

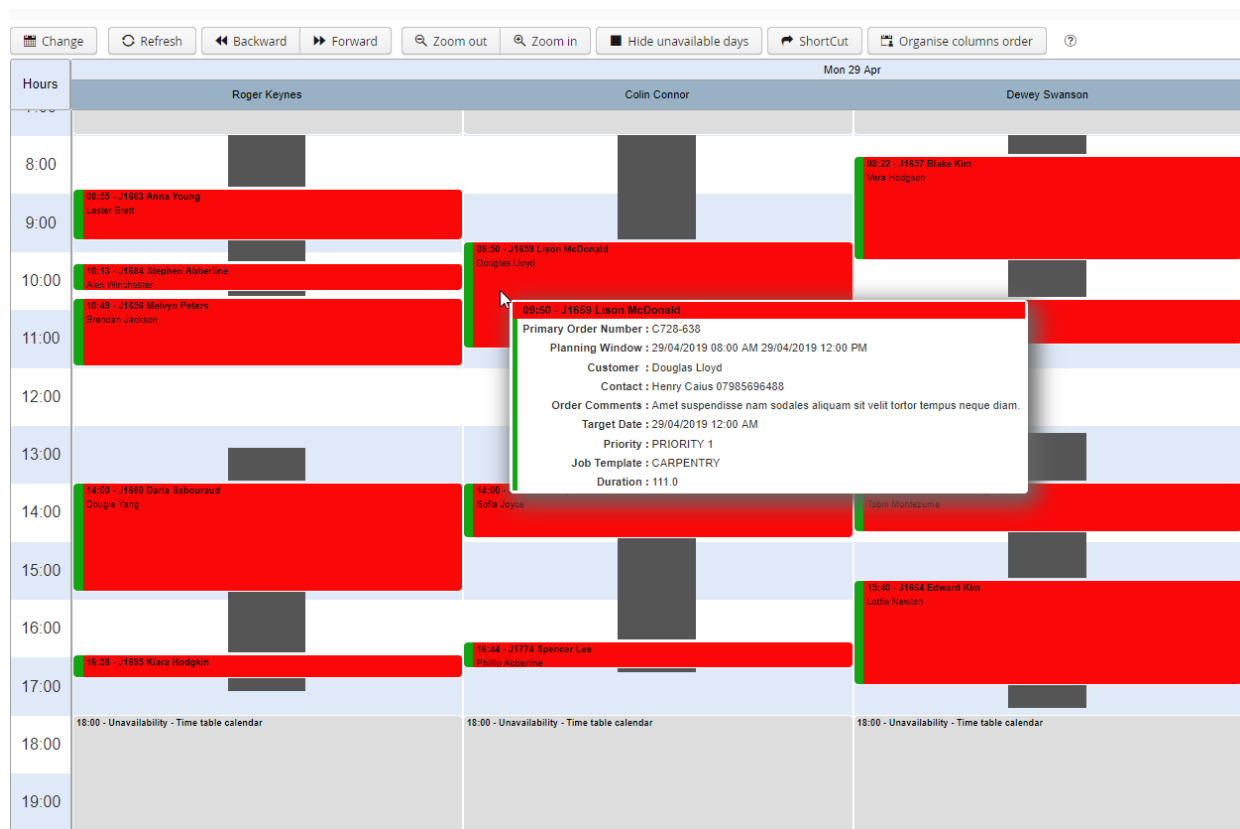
7.4.1 Diary View

The main element of the Diary View are the Diaries. They consist of many pieces of information that together provide a representation of the current availability or Worker Load across the selected Diary View.

The Diaries will contain Jobs, which will be coloured based on the Status of the Job and Unavailability Blocks, which by default, will be grey. Hovering over any item within the Diary will display a block of information relevant to the item Hovered over.

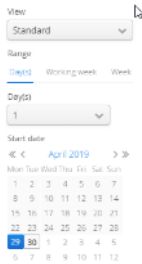
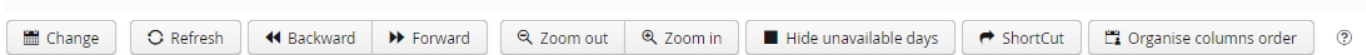
Travel time is depicted by a dark black line between tasks.

At the top of the Diary pane are the control mechanisms for the viewed diaries. You have the ability to move forward and back from the selected date, Hide unavailable days, create a shortcut and organise the order of the columns.



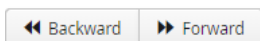
7.4.2 Diary Controls

Above the Diaries are the Diary Controls.

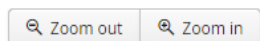


Selecting the CHANGE button will allow you to change your Planning configuration, set your Time Windows or choose a number of days to view and set your dates accordingly.

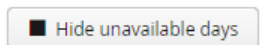
Refreshing will update your selection as required.



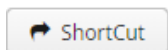
The Backward and Forward buttons will move the diaries in their respective direction based on your period selection above.



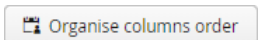
The Zoom buttons will change the number of hours of the day displayed on your diary selection.



The Hide Unavailable Days button will hide any days where there is no availability within your selection. It will only remove days which are fully unavailable.



The Shortcut button will allow you to save your current diary state to access quickly next time. This is discussed in greater detail below.



The Organise Columns Order button allows you to set the order of your diaries as you prefer. Used in conjunction with the Shortcut button, you can save a custom static state to return to quickly next time if it is required. This will be discussed in greater detail below.

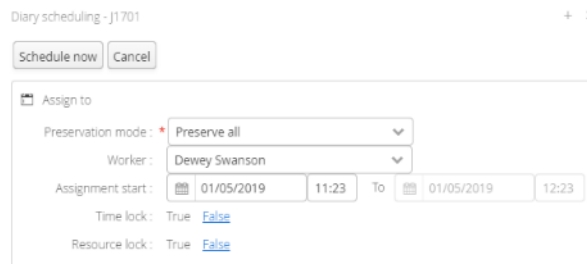


The Help icon can provide some useful assistance in regards to Drag and Drop, Unavailability's and Job Detail.

7.4.3 Drag and Drop

Drag and Drop works using the Jobs within the Diaries themselves. If you have the profile right, you can directly drag & drop jobs within the diary. Simply select a job by left clicking and drag into the desired position. You can only drag and drop jobs which are at a status of Planned.

Once dropped, a popup will open and present you with further scheduling options.



Update the required detail and click SCHEDULE NOW to complete the move. Within PRESERVATION MODE you may need to select other options, such as Force Schedule to allow DRS to confirm the decision.

7.5 Planning Shortcuts

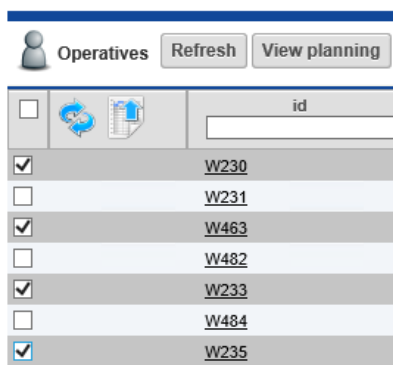
Shortcuts in DRS are a powerful way to navigate through several sets of Diary Views without having to reselect the View Parameters every time.

They are displayed towards the bottom left of every Tab you view.

Shortcuts	
	All Plumbers
	Breakers
	Marks Men
	Steve's Crew

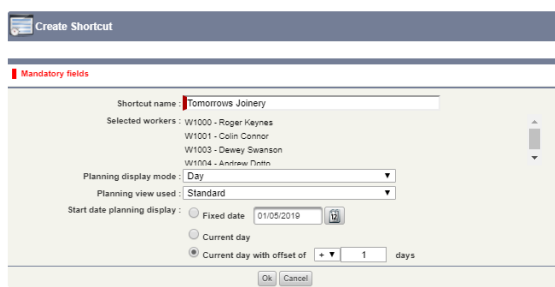
To Save a Shortcut, first, select the Diaries you would like to save the Shortcut for and Select VIEW PLANNING.



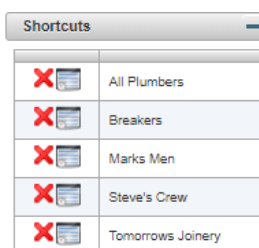


Once you have your selected diaries in view, click on the Shortcut button within the Diary Controls.

This will give you the option to configure your Shortcut in a meaningful way. Complete all the relevant fields and select OK.



Your Shortcut will now appear in the Shortcut Window and can be clicked at any time to return you to the configured Diary View.



7.6 Organise Columns Order

The Organise Columns Order allows you to arrange the diaries in a way that is meaningful and useful to you.

Start by clicking the Organise Columns Order in the Diary Controls.



Within the provided window, move the workers in to a more meaningful order by dragging and dropping and select Apply.

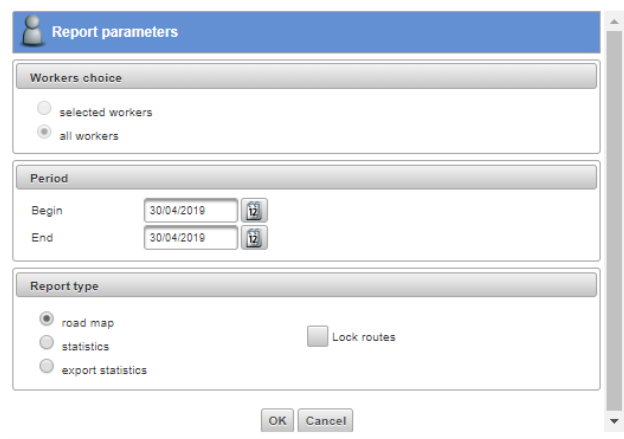


This will arrange your viewed diaries in the amended order. Saving a shortcut will preserve the order you have set.

7.7 Reports

Reports within the Planning and Worker view allow you to information about the Worker and his workload. These reports are commonly referred to as Run Sheets.

To access this, select your Worker and click REPORTS.



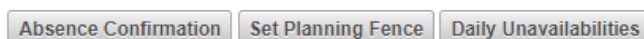
Selecting Road Map will provide you with a Manual Sheet of the selected Workers workload for the selected Time Period.

Statistics and Export Statistics will provide you with analysable data for the selected Worker based on the Time Period.

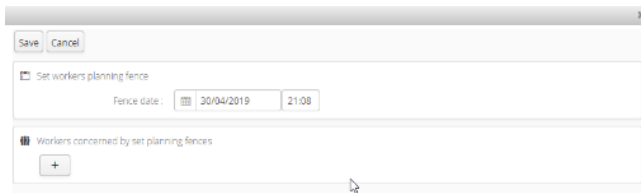
7.8 Planning Fence

Setting the Planning Fence for a given date will stop DRS from Dynamically Scheduling Jobs which occur prior to the selected date. This function is commonly used in conjunction with Route Maps and the Task Dispatch Interface where selected Jobs are handed out ahead of their Scheduling Window and cannot be moved for business reasons.

To set the Planning Fence, select a single Resource and click SET PLANNING FENCE



Set the required workers by clicking the + button, set your date and time as needed and click Save.

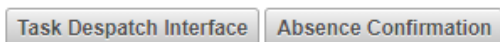


When complete, you will be informed of the success.

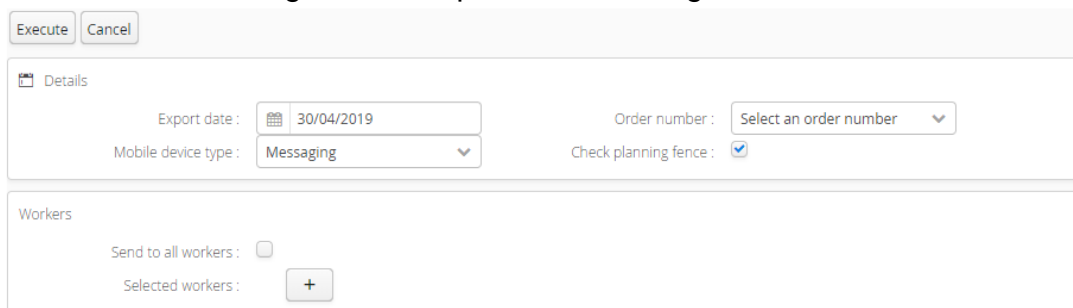
7.9 Task Dispatch Interface

The Task Dispatch Interface will progress a single or many Jobs to Dispatched Status, thereby locking the Job to both Time and Resource. This function will also commonly export an Allocation File or WebServices Call to the Parent system. This allows the Parent System to know which resource is allocated to a given Job.

To use the Task Dispatch Interface, Select a single Worker and click TASK DISPATCH INTERFACE.



From here, select your Date, Resources, Mobile Device Type or Order number. You can also choose to ignore or respect the Planning Fence.

The form is titled 'Task Dispatch Interface' and contains two main sections. The top section, labeled 'Details', includes fields for 'Export date' (set to 30/04/2019), 'Mobile device type' (set to Messaging), 'Order number' (a dropdown menu with 'Select an order number'), and 'Check planning fence' (a checked checkbox). The bottom section, labeled 'Workers', includes a 'Send to all workers' checkbox and a 'Selected workers' field with a '+' button.

When you have completed your selections, click Execute. If you would like to back out of your Selections, select CANCEL.

7.10 Other Planning Functionality

As Planning shares many common elements of Functionality with the Worker Tab, discussion of other Functionality can be found by following the hyperlink below.

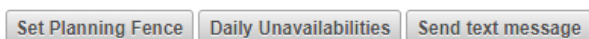
[Workers](#)

8 Text Messaging

DRS v5.7 includes a powerful Text Messaging solution available to customers who also subscribe to the Kirona Text Messaging portal.

Text messages can be sent direct to Customers and Operatives alike using pre-set Message Templates or Custom one off messaging content.

To send a Text message, click the Send Text Message button wherever you find it.



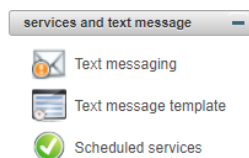
From within, select your Message Template, set your phone number and edit the Message as required.



When complete, click Send and your message will be sent directly through the Kirona SMS portal.

8.1 Text Message Templates

Text Message Templates are configured within the Configuration Tab. You will need permissions on your profile to gain access to this functionality.



To configure a Text Message Template, click on Text Message Template in the Services and Text Message section of the Configuration Panel.

Add, Edit or Delete templates by using the buttons at the top of the screen.

Add Edit Delete

Templates

Columns X Reset Keep Refresh Export ?

<input type="checkbox"/>	Name	Origin
<input type="checkbox"/>	<input type="text"/>	[edit]
<input type="checkbox"/>	Update	From selected job sent to its a...
<input type="checkbox"/>	Someones Knocking	From selected customer
<input type="checkbox"/>	Knock Knock	From selected job sent to the ...
<input type="checkbox"/>	Gimme a call	From selected worker

Records:4

8.1.1 Adding and Editing

Name your template appropriately and then select the mode which best applies to the message you wish to preset.

Details

Name :

Mode

Selection and sending mode

☒ From selected customer
☐ From selected order
☐ From selected job sent to its assigned worker
☐ From selected job sent to the order contact details
☐ From selected worker

Set your preset message. Note the tags below the Message Template field that can be used to dynamically populate your text message. Where the tag refers to NAME, this is the Object Attribute Name that you wish to populate into the message. This Object Attribute must be associated with your chosen mode.

Message template

Message template *

<RES> : worker name
 <SLOT> : jobs slot
 <ED-CUS-NAME> : value of customer's business data NAME
 <ED-SO-NAME> : value of order's Business data NAME
 <ED-JOB-NAME> : value of job's business data NAME
 <ED-WOR-NAME> : value of worker's business data NAME
 <ADDRESS> : address of the job
 <ORD> : primary order number
 <RESCAT> : trade

Once satisfied, select SAVE and your template will be available for selection.

<input type="checkbox"/>	Name	Origin
<input type="checkbox"/>	<input type="text"/>	[edit]
<input type="checkbox"/>	Update	From selected job sent to its a...
<input type="checkbox"/>	Someones Knocking	From selected customer
<input type="checkbox"/>	Knock Knock	From selected job sent to the ...
<input type="checkbox"/>	Gimme a call	From selected worker
<input type="checkbox"/>	Message for Operatives	From selected job sent to its a...

9 Import and Export

9.1 Aims and objectives

After working through this section you should be able to

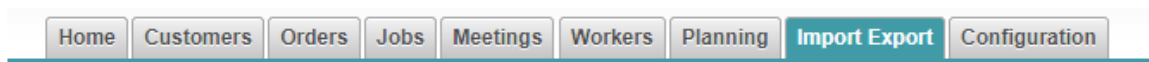
- Understand the function of the Object Tab
- Understand the function of the History Tab
- Access and Export History Information

9.2 Getting Started with Import and Export

The Import/Export Tab allows you to Upload and Download data to DRS which can quickly allow you to configure and re-configure datasets critical to the Scheduling Solution.

To access Import/Export,

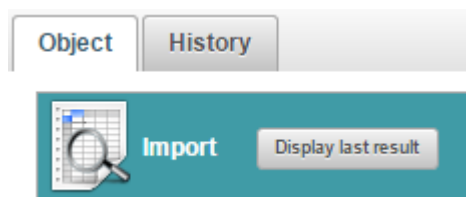
Click the IMPORT/EXPORT tab



There are three sub-tabs within Import/Export, Object, History and Services and text messages.

9.3 Object

9.3.1 Import



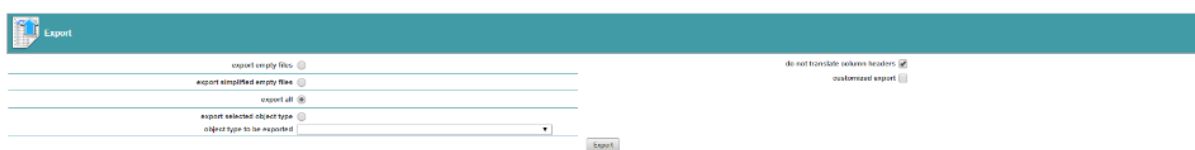
Improper use of the Import options within the Object Tab can cause significant damage to your DRS Installation and is not recommended without direct or prior instruction from your Kirona Project Manager or Kirona Support. Any damage resulting from incorrect use of the Import function may not be warrantable by your support contract.

As a result of this, separate training can be provided on request to Key Personnel within your organisation on the use of this function.

9.3.2 Export

The Export function can be used to export data from the DRS database into a readable CSV file.

To use, select the most appropriate option from either the radio buttons or dropdown list and select EXPORT.



NOTE: repeated or excessive exporting of large amounts of data using this function may impact overall system performance.

9.4 History

History provides you with the ability to analyse changes within DRS Elements as well as viewing and analysing Historical Scheduling Actions.

To use the History Export function, select the Object Type you wish to analyse and use the available filters to limit the return of results to your required dataset. Then choose your export file type using the buttons at the bottom of the pane.

This will gather the requested information together and provide it to you in a file which should automatically download within your browser.

NOTE: Some IT Policies will limit this functionality. Any issues should in the first instance be directed at your ICT Support Desk.

object type to be exported : property

Date	Type	Action	Id	Name	Username	Email
03/02/2016 12:27 PM	property	modified	0000913123	123E Bourne Road Pangbourne Reading	M. Admin	admin@sovereign
27/01/2016 12:18 PM	property	modified	0241001100	11 Coles Close Sturminster Newton Dorset	M. Admin	admin@sovereign
27/01/2016 11:07 AM	property	modified	0854000800	6 Baily Avenue Thatcham Newbury	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F021000900	10 Hoopers Yard Briscoe Ebley	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F019001800	18 Fitzwaryn Place Wantage Oxfordshire	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F021000400	2A Willow Road Kings Stanley Stonehouse	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F021000500	8 Nasse Court Gloucestershire	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F021001200	13 Bridgeside Cainscross Stroud	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F021000800	23 Albert Road Briscoe Stroud	M. Admin	admin@sovereign
26/01/2016 02:54 PM	property	modified	F019003000	30 Fitzwaryn Place Wantage Oxfordshire	M. Admin	admin@sovereign

Export (csv) Export (Excel) 181556 elements

NOTE: Attempting to export significant amounts of data will take a notable time. Due to this, data set export limits are imposed at 20,000 elements.

9.5 Services and text messaging

This tab provides a searchable history of text messages sent via the DRS application. Enter your parameters and select SEARCH when you are ready. Columns are configurable via the COLUMNS button. Use the EXPORT dropdown to select your chosen Export file type.

Object History Services and text messages

History

SMS (search) Search Columns Reset Export

Sent	Phone	Sender	Message	Error	Status	Origin	Object ID
					sent		

10 Configuration

10.1 Aims and objectives

After working through this section you should be able to

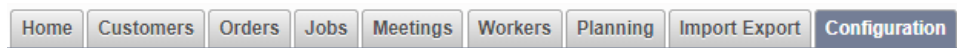
- Know the different functions of the Configuration Menu
- Configure Users, Contracts, Profiles and Agencies
- Modify and Review Planning Display Screens
- Understand and Configure Object Attributes and their functions
- Understand and Configure Calendars
- Understand and Configure Quotas
- Understand and Configure Slots
- Understand, Configure and Assign Views

10.2 Getting Started with Configuration

The Configuration Tab within DRS is the location for all the configurable Elements within DRS. Your profile must have Administration Access to view this tab.

To access the Configuration Tab,

Click the CONFIGURATION tab

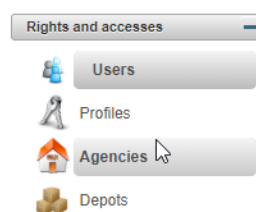


10.3 Configuration Menu

On entering the Configuration Tab, you will be viewing the Configuration Menu pane. Functions are accessed by clicking on the relevant menu item.



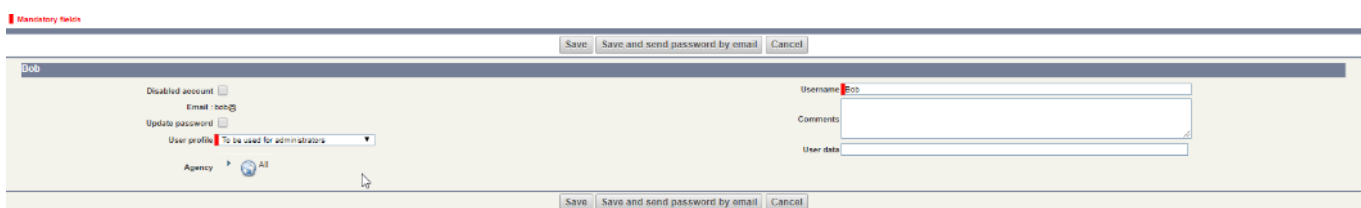
10.4 Rights and Accesses



10.4.1 Users

Users are those who are configured to access the system. User access is controlled by associating the User with a configured User Profile.

User access can be linked to one or multiple agencies.

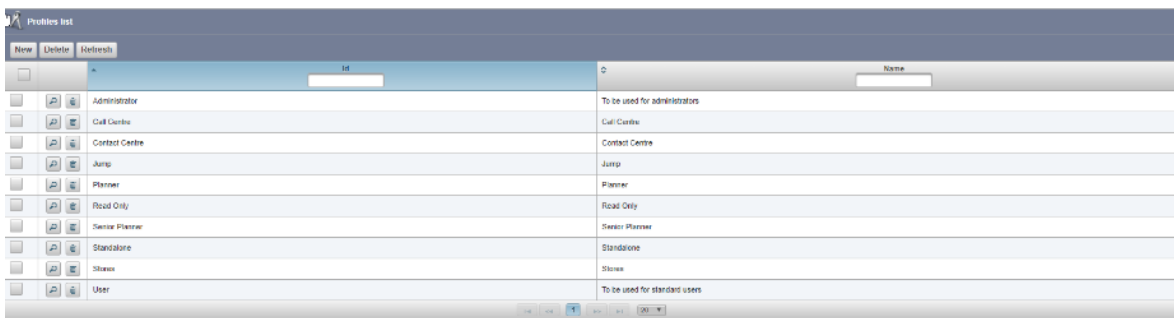

 A form titled 'Bob' for user configuration. It includes checkboxes for 'Disabled account' and 'Update password', a dropdown for 'User profile' (set to 'To be used for administrators'), and a dropdown for 'Agency' (set to 'All'). On the right, there are input fields for 'Username' (containing 'Bob'), 'Comments', and 'User date'. At the top and bottom are buttons: 'Save', 'Save and send password by email', and 'Cancel'. A red 'Mandatory field' indicator is at the top left.

10.4.2 Profiles

Profiles are used within DRS to provide the correct access for the different Order roles. Through Profiles you can limit access to:

- Tabs
- Options
- Functionality
- Buttons

Clicking on the Profiles link will list the currently configured Profiles within DRS.



ID	Name
Administrator	To be used for administrators
Call Centre	Call Centre
Contact Centre	Contact Centre
Jump	Jump
Planner	Planner
Road Only	Road Only
Service Planner	Service Planner
Standalone	Standalone
Store	Store
User	To be used for standard users

You can create your own Profile by clicking NEW, Delete a profile by selecting it and clicking DELETE and refresh the list after changes by clicking REFRESH.

To view any configured profile, click the MAGNIFYING GLASS associated with the profile name.

The various panes within the Profile View provide granular functionality to control the access for the associated User.

User profile

Id : Administrator
Name : To be used for administrators
Slots template : default
Level of importance : 100

Administration rights

- ☒ Administration
- ☒ Manage calendars
- ☒ Manage modelling
- ☒ Manage personalisation
- ☒ Manage rights and accesses

Rights

Customer

- ☐ Deletion
- ☒ Modification
- ☒ Unavailability modification
- ☒ creation

Job

- ☒ Creation
- ☒ Remove jobs from group
- ☒ Deletion
- ☒ Job closing
- ☒ Modification

Order

- ☒ Creation
- ☒ Sequences management
- ☒ Deletion
- ☒ Modification

Worker

- ☒ Creation
- ☒ Deletion
- ☒ Manage panic mode
- ☒ Modification

Planification

- ☒ Change jobs status to completed or from completed to another status
- ☒ Change jobs status to planned
- ☒ Change jobs status to started/despached/accepted
- ☒ Change jobs status to suspended
- ☒ Force scheduling
- ☒ Immediately force when manual assignment fails
- ☒ Lock/unlock the jobs
- ☒ Reschedule non "planned" jobs
- ☒ Scheduling failure diagnostic
- ☐ Scheduling out of the time window
- ☒ Time window begin modification
- ☒ Time window end modification

Planning

- ☒ Drag and drop
- ☒ Show slot template list
- ☒ Modify shared planning shortcuts
- ☒ No planning preservation
- ☒ Planning preservation
- ☒ Show possible worker on slot

Others

- ☒ Batch export
- ☐ Cart management of other users
- ☒ Export auditing
- ☒ Show all slot
- ☒ Batch import
- ☒ Complete batch restoration
- ☒ Modify optimization parameter

Jobs management

Access and visibility restrictions on certain objects

- ☐ Restrict access to the customers according to an object attribute
- ☐ Restrict access to the orders
- ☐ Restrict access to the jobs according to an object attribute
- ☐ Restrict access to certain job templates
- ☐ Restrict access to certain customer templates

Visibility

- ☒ See all my agencies at once
- ☒ See the Customer tab
- ☒ See the Job tab
- ☒ See the Meeting tab
- ☒ See the Planning tab
- ☒ See the concepts order
- ☒ See the concepts worker and of assignment

Archiving objects

Warning : deleting archived objects can cause inconsistencies in the planning archives.

- ☐ Delete all archived objects
- ☐ Delete unassigned archived objects
- ☒ Edit past objects
- ☒ View past objects

Views management

- ☒ Create, edit and delete own views
- ☒ See "Standard", "Research" and "All" views

Planning fence data

- ☐ Customize planning fence date

Custom rights module

- ☒ View Utility Admin Functions

Associate planning configuration

Default planning configuration : Standard

You can control the visibility and availability of buttons to profiles by maintaining the **CUSTOMIZED BUTTONS BY SCREEN** list.

Screen ID	Customized buttons ID
<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Scheduler First view	
<input checked="" type="checkbox"/> Worker List view	
<input checked="" type="checkbox"/> Scheduler List	
<input checked="" type="checkbox"/> Planning Menu List	
<input checked="" type="checkbox"/> Customer First view	
<input checked="" type="checkbox"/> Scheduler List view	
<input checked="" type="checkbox"/> Worker List	
<input checked="" type="checkbox"/> Job List	
<input checked="" type="checkbox"/> Customer List	
<input checked="" type="checkbox"/> Planning Menu View Start	
<input checked="" type="checkbox"/> Planning List	
<input checked="" type="checkbox"/> Planning Menu JobList	
<input checked="" type="checkbox"/> Planning Menu Diagnostic	
<input checked="" type="checkbox"/> Job Edit view	

NOTE: Your DRS system will be pre-configured with many useful profiles. Review the available accessibility before creating additional profiles.

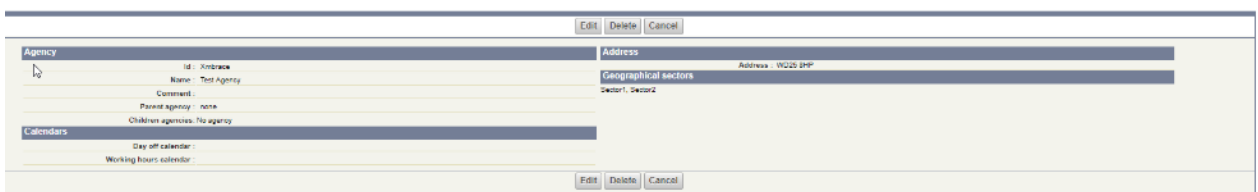
10.4.3 Agencies

An Agency is your Organisation. Please note the following important details regarding Agencies.

- Your DRS system can have single or multiple Agencies
- An Agency can have multiple Contracts
- Properties can ONLY be in ONE Agency
- Resources can ONLY be in ONE Agency
- Sectors are linked to an Agency
- Sectors are linked to Resources

- Sectors Control where a Worker is assigned Work
- Sectors are defined by Post-Code
- Changing Sector to Agency relationships require careful management of linked resources
- Sectors can belong to multiple agencies

Your Agency should be configured and any changes should be discussed with your Kirona Project Manager or Kirona Support before progressing. Your configuration may differ from below.



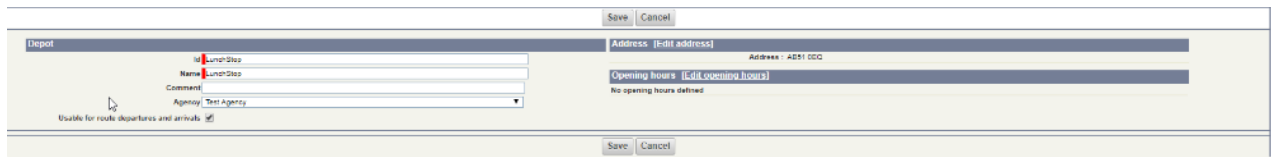
The screenshot shows a web-based form for configuring an Agency. At the top right are buttons for 'Edit', 'Delete', and 'Cancel'. The form is divided into several sections:

- Agency**: Contains fields for 'Id' (value: Xmbace), 'Name' (value: Test Agency), 'Comment', 'Parent agency' (value: none), and 'Children agencies' (value: No agency).
- Address**: Contains a field for 'Address' (value: WU25 8HP).
- Geographical sectors**: A section with a 'Sector 1' dropdown menu currently set to 'Sector2'.
- Calendars**: Contains fields for 'Day off calendar' and 'Working hours calendar'.

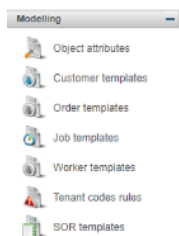
At the bottom right of the form are buttons for 'Edit', 'Delete', and 'Cancel'.

10.4.4 Depots

Depots can be used to identify Static locations of reference for DRS Scheduling Solution. They can be used in conjunction with the Working Hours Calendar when attempting to Schedule Jobs to best understand the impact of Travel across your Sectors.



10.5 Modelling

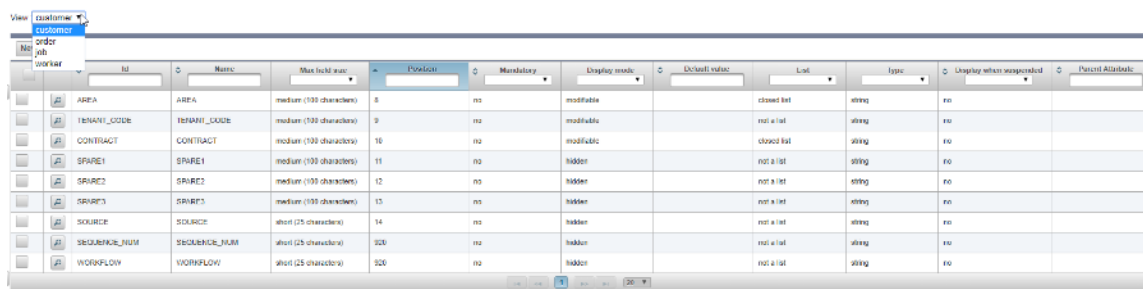


10.5.1 Object Attributes

Object Attributes are the building blocks DRS uses to resolve Scheduling Solutions and viewing requests. Objects can either have a Set of Fixed Characteristics, a Closed List of options to select from or Free Text.

NOTE: It is important when adding Object Attributes that you consult with your Kirona Project Manager or Kirona Support. Attributes cannot be removed from the Schema once added.

You can select what Object Type you wish to view the attributes of by using the VIEW dropdown.

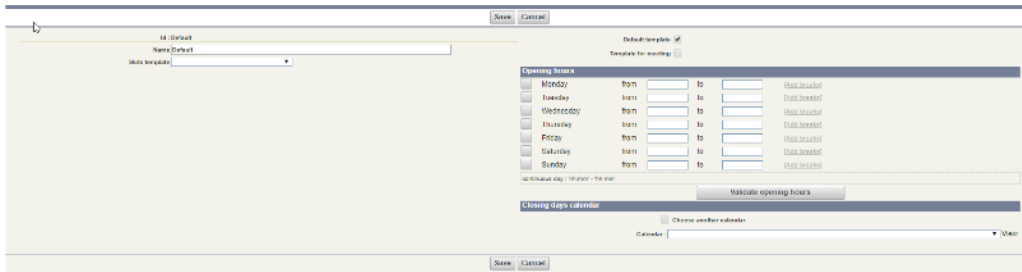


ID	Name	Max length	Position	Mandatory	Display mode	Display when suspended	Percent Allowed
AREA	AREA	medium (100 characters)	8	no	modifiable	closed list	string
TENANT_CODE	TENANT_CODE	medium (100 characters)	9	no	modifiable	not a list	string
CONTRACT	CONTRACT	medium (100 characters)	10	no	modifiable	closed list	string
SPARE1	SPARE1	medium (100 characters)	11	no	hidden	not a list	string
SPARE2	SPARE2	medium (100 characters)	12	no	hidden	not a list	string
SPARE3	SPARE3	medium (100 characters)	13	no	hidden	not a list	string
SOURCE	SOURCE	short (25 characters)	14	no	hidden	not a list	string
SEQUENCE_NUM	SEQUENCE_NUM	short (25 characters)	15	no	hidden	not a list	string
WORKFLOW	WORKFLOW	short (25 characters)	16	no	hidden	not a list	string

When reviewing Object Attributes it is important that you consult your Kirona Project Manager or Kirona Support before committing any changes. Changes to Object Attributes without proper consideration can have significant effect on any given Scheduling Solution.

10.5.2 Customer Templates

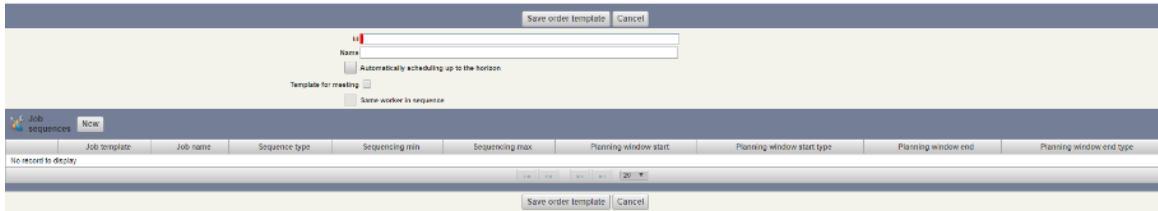
Customer Templates can be used to define available and unavailable time for Customers or set specific locations as Meeting sites. Slot Templates can also be set to allow for a different appointment offering. This can be useful in locations where access during the standard working day is difficult to gain, for example.



10.5.3 Order Templates

Order Templates are used to define Meeting configuration or Sequenced Tasks. Sequenced Tasks are Orders which create a specific order of events when requested via the Core API, or manually created through the DRS Orders Tab.

Please consult your Kirona Project Manager for more information on this functionality.



10.5.4 Worker Templates

The Worker Templates define the list of Attributes that can be configured against a Worker Resource. Commonly this will be a SKILL or associated TRADE but can be anything that can be used to define the required abilities to complete the task at hand.

Inspect, Add, Edit and Delete using the available buttons.

NOTE: Editing or Deleting options from this menu may significantly affect your scheduling performance and solution. If you are unsure, consult your Kirona Project Manager or Kirona Support.

Mandatory fields

Id: REPAIRS
Name: REPAIRS
Default template: yes

Customized object attributes

Name	Position	Display mode	Mandatory	Default value	Allowed values
No record to display					

Abilities

Id	Name	Position	Mandatory	Default value	List	Type	Attribute
SKILL	SKILL	1	no		closed list	string	
WORK_CLASSIFICATION	WORK_CLASSIFICATION	2	no		closed list	string	
TEAM	TEAM	3	no		closed list	string	
PROJECT_PLANNER_RES	PROJECT_PLANNER_RES	4	no		closed list	string	

10.5.5 Job Templates

Job Templates maintain the parameters a Job will be assigned when loaded in from your Parent System. Individual SOR's will be mapped to Job Templates which will dictate which Worker Resource can be assigned any given Job.

Job Templates can be created from NEW, Copied from an existing Template or Deleted if no longer necessary. Deleting a Job Template should be done with Caution as any active Job currently identifying against a Job Template which is deleted will no longer be resolvable by the Scheduling Solution.

Management of job templates

New Delete Refresh Copy

Id	Name	Default template	Planning window duration	Unit	Threshold	Synchronous requests	Priority	Attraction	Preventive maintenance	Duration modifiers
BRICKLAYING	BRICKLAYING	no	7	days	0	no	standard	none	no	no
CARPENTRY	CARPENTRY	no	7	days	0	no	standard	none	no	no
DECORATING	DECORATING	no	7	days	0	no	standard	none	no	no
DRAINS	DRAINS	no	7	days	0	no	standard	none	no	no
INVALID	INVALID	no	7	days	0	no	standard	none	no	no
PLASTERING	PLASTERING	no	7	days	0	no	standard	none	no	no
PLUMBING	PLUMBING	no	7	days	0	no	standard	none	no	no
ROOFING	ROOFING	no	7	days	0	no	standard	none	no	no

Job Templates can be viewed by selecting the Magnifying Glass associated with the Job Template

Id: BRICKLAYING
Name: BRICKLAYING
Template for meeting: no
Planning window duration: 7 days
Start template: default
Synchronous requests: no
Default template: no
Modification customer: no
Worker Category:

Priority: standard
Attraction: none
Preventive maintenance: no
Geolocated job: yes
Use only primary resources: no
Duration modifiers: no
Opening hours is inherited: no

Opening hours
No opening hours defined

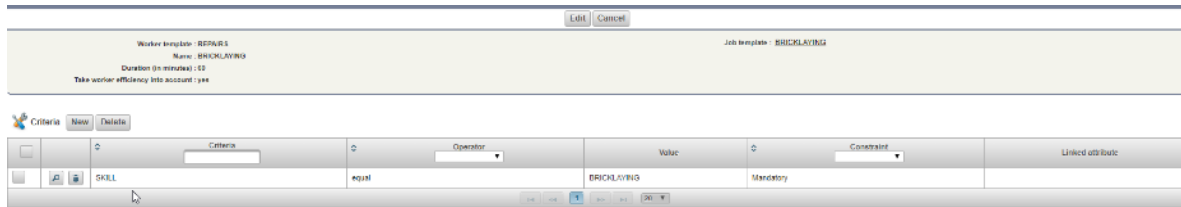
Customized object attributes

Name	Position	Display mode	Mandatory	Default value	Allowed values
No record to display					

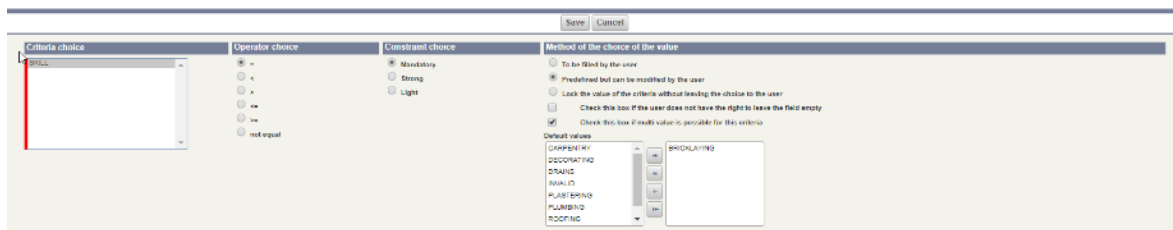
Worker requests

Worker template	Name	Duration (in minutes)	Spread (in minutes)	Association type
REPAIRS	BRICKLAYING	50.0	0.0	occasional

By clicking on the WORKER REQUESTS magnifying glass, you can inspect the associated Worker Template with the Job Template

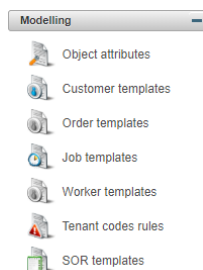


By Editing the Job Template, you can modify the Criteria used to resolve a Scheduling Solution



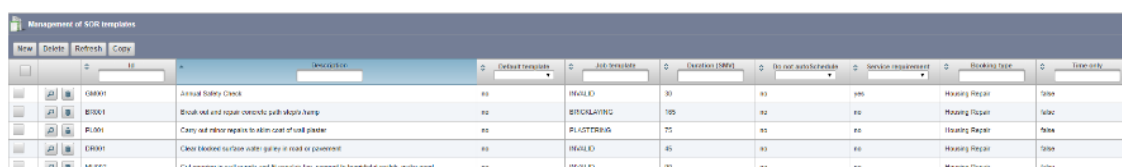
NOTE: Mandatory Constraints should be used by default. Strong and Light preferences should only be applied after consulting your Kirona Project Manager or Kirona Support.

10.5.6 SOR Templates



SOR Codes are now managed through the Configuration Tab by selecting the SOR Templates option.

From here, you can create New SOR's by selecting NEW, Delete SOR's by selecting the appropriate SOR and clicking DELETE or Copy an existing SOR by selecting a SOR and clicking the COPY button.

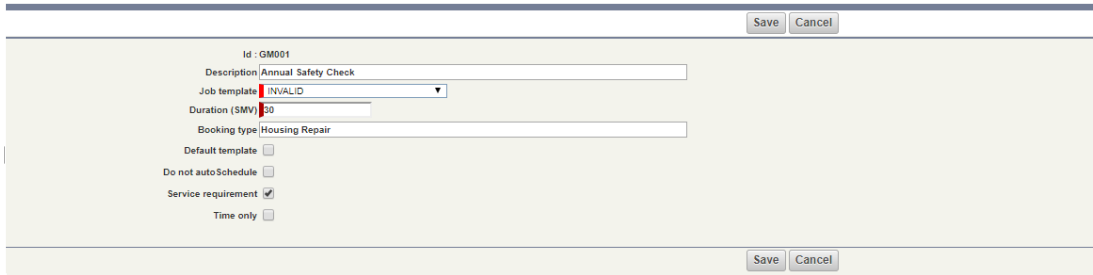


SOR code	Description	Default template	Job template	Duration (min)	Is not auto scheduled	Service requirement	Working type	User only
00001	Annual Safety Check	no	INVALID	30	no	no	Working Repair	Yes
00002	Break out and repair concrete path/driveway	no	BRICKLAYING	105	no	no	Working Repair	Yes
00003	Carry out minor repairs to stone coast of wall garden	no	PLASTERING	75	no	no	Working Repair	Yes
00004	Clear blocked or close outside gutter or road or pavement	no	INVALID	45	no	no	Working Repair	Yes
00005	Call opening in wall supply and install fan, connect to horizontal switch, install good	no	INVALID	30	no	no	Working Repair	Yes

This screen allows you to search for existing SOR's using the filter options at the top of each column. To review the setup of a given SOR, click the Spyglass icon to the left of the selected SOR.

10.5.6.1 New or Edit SOR's

To create a New SOR, select the New button. To edit a SOR select the spyglass icon to the left of your SOR and then select EDIT. In both cases, you will be presented with the following screen,

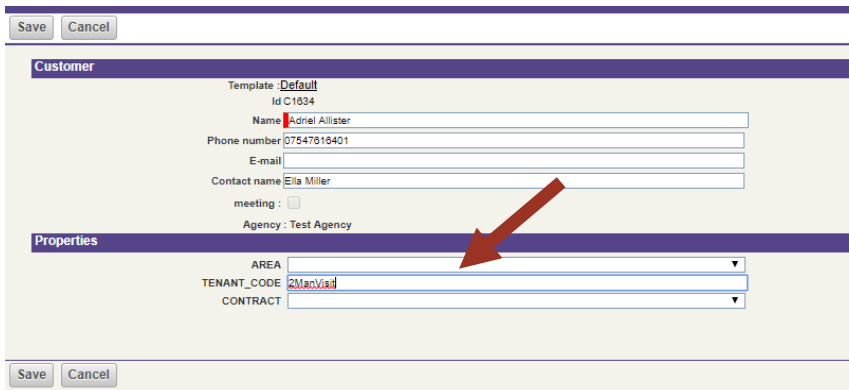


- The ID field is your SOR.
- The Description Field is the SOR description
- The Job Template must be created in the JOB TEMPLATE screens before you are able to apply it to the Job Template field.
- The Duration is the SOR's SMV
- The Booking Type is always 'Housing Repair' unless otherwise instructed by your Kirona Project Manager.
- The Service requirement field is used for the Cyclical Servicing module.
- Other options have special use cases and can be discussed with your Kirona Project Manager.

10.6 Tenant Code Rules

Tenant Codes Rules can be configured to monitor the inbound tasks where they are raised against locations which have Tenant Codes configured.

The Tenant Code Rules use the value mapped to Tenant Code on the Customer (below) to re-direct the Job Template assignment from the default job template to one that is alternatively defined. This is commonly used to identify customers which have previously been identified to require more than one operative to attend.



Save Cancel

Customer

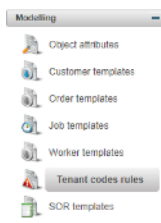
Template: Default
Id: C1034

Name: Adriel Allister
Phone number: 07547016401
E-mail:
Contact name: Ella Miller
meeting: ☐
Agency: Test Agency

Properties

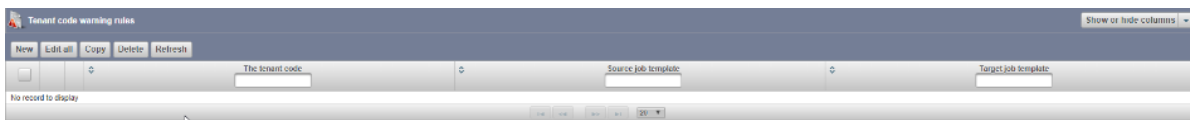
AREA:
TENANT_CODE: ManVat
CONTRACT:

Save Cancel



To access Tenant Code Rules, from the Configuration tab, select Tenant Code Rules within the Modelling section.

On the following screen you can create New Tenant code rules, inspect, copy and delete existing rules.



Tenant code warning rules

New Edit all Copy Delete Refresh

Show or hide columns

	The tenant code	Source job template	Target job template
No record to display			

When creating new Tenant code rules, there are 2 options. You can identify the specific Job Template and what that template will be mapped to.



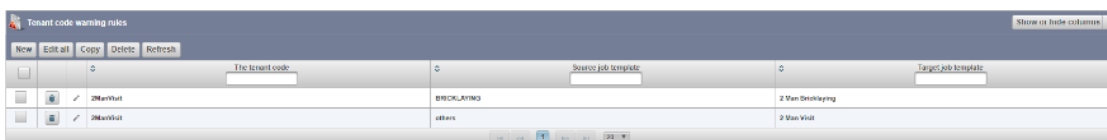
Tenant code warning rules (You are in creation mode. Don't forget to save changes.)

New Copy Delete Cancel Save

Show or hide columns

	The tenant code	Source job template	Target job template
<input checked="" type="checkbox"/>	ManVat	BASICLAYSING	2 Man Viscaying

You can also select all 'Other' templates and map them to an alternative template.



Tenant code warning rules

New Edit all Copy Delete Refresh

Show or hide columns

	The tenant code	Source job template	Target job template
<input checked="" type="checkbox"/>	ManVat	Other	2 Man Viscaying
<input checked="" type="checkbox"/>	ManVat	Other	2 Man Visc

Selecting 'Other' will result in any job which is mapped to a customer which contains the selected Tenant Code Rule will be mapped to the Target Job Template rather than the Default Job template.

10.7 Calendars

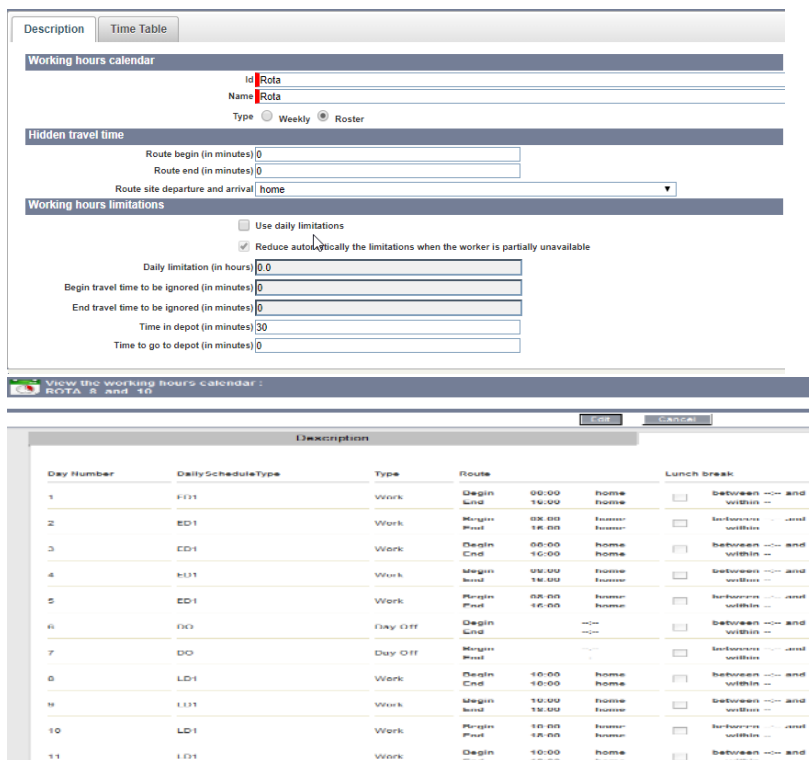
There are two types of Calendars. Rosters, for cyclical working or shifts, and, Weekly, for regular Weekly working. Both calendars have the provision to apply a fixed lunch break however, this is not recommended.

Calendars are linked to Resources and exert control over the Resources availability during the Scheduling Solution calculation.

10.7.1 Rosters

Rosters are typically linked to a Start Date. They are typically cyclical and will dictate the Start and End times for working Days as well as when Non Working days occur. They can include a Start and Finish point, either a Home or Depot location and Quotas.

NOTE: Quotas are discussed in detail later in this section.



The screenshot shows the 'Working hours calendar' configuration window. It includes tabs for 'Description' and 'Time Table'. The 'Description' tab is active, showing fields for 'Id' (Rota), 'Name' (Rota), and 'Type' (Weekly, Roster). Below these are 'Hidden travel time' fields for 'Route begin (in minutes)', 'Route end (in minutes)', and 'Route site departure and arrival' (home). The 'Working hours limitations' section has checkboxes for 'Use daily limitations' and 'Reduce automatically the limitations when the worker is partially unavailable'. Below these are input fields for 'Daily limitation (in hours)', 'Begin travel time to be ignored (in minutes)', 'End travel time to be ignored (in minutes)', 'Time in depot (in minutes)', and 'Time to go to depot (in minutes)'. At the bottom, there is a button to 'View the working hours calendar' and a link to 'ROTA 5 and 10'.

Day Number	DailyScheduleType	Type	Route	Begin	End	Home	Lunch break
1	ED1	Work	Begin	06:00	16:00	home	Between -- and -- within --
2	ED1	Work	Begin	06:00	16:00	home	Between -- and -- within --
3	ED1	Work	Begin	06:00	16:00	home	Between -- and -- within --
4	ED1	Work	Begin	06:00	16:00	home	Between -- and -- within --
5	ED1	Work	Begin	06:00	16:00	home	Between -- and -- within --
6	DO	Day Off	Begin	--	--	--	Between -- and -- within --
7	DO	Day Off	Begin	--	--	--	Between -- and -- within --
8	LD1	Work	Begin	10:00	16:00	home	Between -- and -- within --
9	LD1	Work	Begin	10:00	16:00	home	Between -- and -- within --
10	LD1	Work	Begin	10:00	16:00	home	Between -- and -- within --
11	LD1	Work	Begin	10:00	16:00	home	Between -- and -- within --

10.7.2 Weekly Calendars

Weekly Calendars are used for all Resources which are not working cyclical patterns. You can dictate Working and Non-Working Days, Daily Start and End times as well as Start and End locations.

	day	Begin	End	Route	Lunch break	Lunch break address	Depot on morning	Depot on evening
<input checked="" type="checkbox"/>	Monday	08:00	18:00	home	<input checked="" type="checkbox"/> between 12:00 and 14:00 within 60	undefined	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Tuesday	08:00	18:00	home	<input checked="" type="checkbox"/> between 12:00 and 14:00 within 60	undefined	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Wednesday	08:00	18:00	home	<input checked="" type="checkbox"/> between 12:00 and 14:00 within 60	undefined	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Thursday	08:00	18:00	home	<input checked="" type="checkbox"/> between 12:00 and 14:00 within 60	undefined	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friday	08:00	18:00	home	<input checked="" type="checkbox"/> between 12:00 and 14:00 within 60	undefined	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Saturday	--:--	--:--	home	<input type="checkbox"/> between --:-- and --:-- within --	undefined	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Sunday	--:--	--:--	home	<input type="checkbox"/> between --:-- and --:-- within --	undefined	<input type="checkbox"/>	<input type="checkbox"/>

10.8 Quotas

The objective of Quotas is to switch a green availability button to red once capacity has been filled with non-emergency or non-urgent Jobs, leaving space for emergency and urgent Jobs.

Quotas can be configured to work with New Jobs, Follow On Jobs and DRS Web Service Gateway.

Quotas are not generally used for all trades, or all Workers.

10.8.1 Quota Configuration

Quotas are configured using a standard Working Hours Calendar. Duration Fill levels are set (in minutes) against configured Emergency, Urgent and Routine Jobs using configured Attributes.

You can set Quotas to calculate Weekly or Daily. Daily is the recommended configuration for Quotas.

Quotas

The sum of attributes DURATION_EMERGENCY can not exceed 0 per day

Controlled value

Maximum value

Period

☒ 1st quota

☐ The number of jobs
☐ The sum of jobs duration
☒ The sum of attributes [DURATION_EME] of the jobs

The sum of attributes DURATION_STANDARD can not exceed 0 per day

Controlled value

Maximum value

Period

☒ 2nd quota

☐ The number of jobs
☐ The sum of jobs duration
☒ The sum of attributes [DURATION_STA] of the jobs

The sum of attributes DURATION_URGENT can not exceed 0 per day

Controlled value

Maximum value

Period

☒ 3rd quota

☐ The number of jobs
☐ The sum of jobs duration
☒ The sum of attributes [DURATION_URC] of the jobs

Quotas

The sum of attributes DURATION_EMERGENCY can not exceed 0 per day

Controlled value

Maximum value

Period

☒ 1st quota

☒ daily
☐ weekly

The sum of attributes DURATION_STANDARD can not exceed 0 per day

Controlled value

Maximum value

Period

☒ 2nd quota

☒ daily
☐ weekly

The sum of attributes DURATION_URGENT can not exceed 0 per day

Controlled value

Maximum value

Period

☒ 3rd quota

☒ daily
☐ weekly

NOTE: Quotas require configuration to be completed within the underlying database structure of DRS. Please consult your Kirona Project Manager or Kirona Support before configuring Quotas.

Uncontrolled If Printed

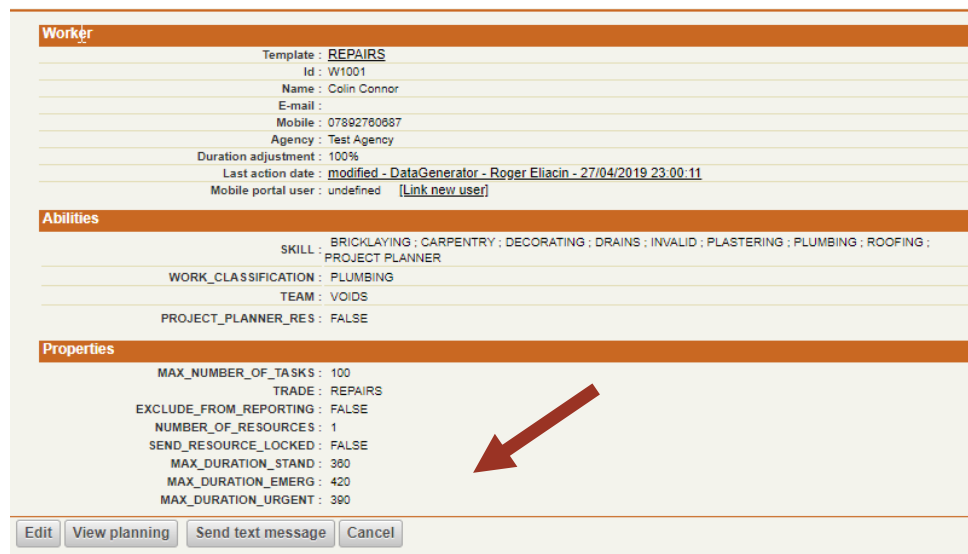
75

Company Confidential

10.8.2 Quotas in Action

Once Quotas are configured, parameters will be recorded against the resources to which the Working Hours Calendar containing the Quotas has been applied.

You can see if a Quota has been correctly applied to a Worker Resource by accessing the Worker Resource Details and reviewing their Properties.



Worker

Template : **REPAIRS**
 Id : W1001
 Name : Colin Connor
 E-mail :
 Mobile : 07892760887
 Agency : Test Agency
 Duration adjustment : 100%
 Last action date : **modified - DataGenerator - Roger Eliacin - 27/04/2019 23:00:11**
 Mobile portal user : undefined ([Link new user](#))

Abilities

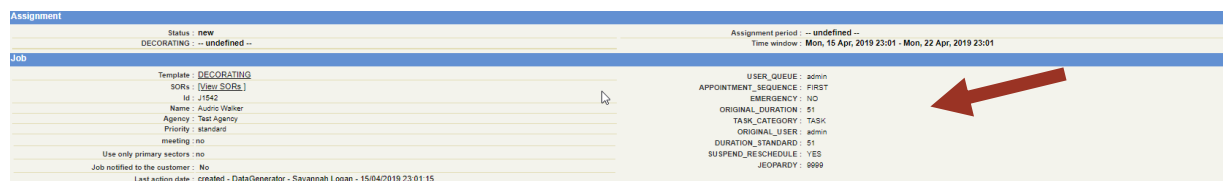
SKILL : BRICKLAYING ; CARPENTRY ; DECORATING ; DRAINS ; INVALID ; PLASTERING ; PLUMBING ; ROOFING ;
 PROJECT_PLANNER
 WORK_CLASSIFICATION : PLUMBING
 TEAM : VOIDS
 PROJECT_PLANNER_RES : FALSE

Properties

MAX_NUMBER_OF_TASKS : 100
 TRADE : REPAIRS
 EXCLUDE_FROM_REPORTING : FALSE
 NUMBER_OF_RESOURCES : 1
 SEND_RESOURCE_LOCKED : FALSE
 MAX_DURATION_STAND : 360
 MAX_DURATION_EMERG : 420
 MAX_DURATION_URGENT : 390

[Edit](#) [View planning](#) [Send text message](#) [Cancel](#)

Quotas will also be applied to Jobs loaded in from your Parent System and recorded against the Job Details.



Assignment

Status : new
 DECORATING : -- undefined --
 Assignment period : -- undefined --
 Time window : Mon, 15 Apr, 2019 23:01 - Mon, 22 Apr, 2019 23:01

Job

Template : **DECORATING**
 SORs : ([View SORs](#))
 Id : 1042
 Name : Andre Walker
 Agency : Test Agency
 Priority : standard
 meeting : no
 Use only primary sectors : no
 Job notified to the customer : No
 Last action date : **created - DataGenerator - Savannah Logan - 15/04/2019 23:01:15**

USER_QUEUE : admin
 APPOINTMENT_SEQUENCE : FIRST
 EMERGENCY : NO
 ORIGINAL_DURATION : 51
 TASK_CATEGORY : TASK
 ORIGINAL_USER : admin
 DURATION_STANDARD : 51
 SUSPEND_RESCHEDULE : YES
 JEOPARDY : 9999

10.9 Unavailability Calendars

Unavailability Calendars are configured in the same way as regular Working Day Calendars, however, they are used to manage periods of time where there may be a limit to a group or all resources, such as Public Holidays.

Unavailability Reasons are used when creating Unavailability's directly on the Worker Resource or Diary View.

11 Personalisation

11.1 KPI Settings

In conjunction with Kirona InfoSuite, DRS can be configured to gather KPI reporting for items such as Appointment Made and Kept and First Time Fix.

View: Appointment Reason

No	Appointment Reason	Completion Status	Priority Group	Resource Group	ID	Is next	Exclude from extract
<input type="checkbox"/>	ABSENT (OTHER)	no					no
<input type="checkbox"/>	BROUGHT FORWARD	yes					no
<input type="checkbox"/>	FIRST	yes					no
<input type="checkbox"/>	FOLLOW-ON	yes					no
<input type="checkbox"/>	HOLIDAY	no					no
<input type="checkbox"/>	PLANNING CHANGED WITH TENANT APPROVAL	yes					no
<input type="checkbox"/>	SICKNESS	no					no
<input type="checkbox"/>	SUPERVISOR	yes					no
<input type="checkbox"/>	TENANT REQUEST	yes					no

For more information on this functionality, speak with your Kirona Account Manager or Kirona Project Manager.

11.2 Slots

Slots are the Scheduling Windows DRS uses during the Scheduling Solution to determine availability for the Resources.

The Scheduling Solution uses the sequence below to determine the possible Scheduling Solution result.

Property/Property Template > Job Template > Profile > Default

Once a Scheduling Solution has been resolved, the Scheduling Window will be displayed and may look something like the image below.

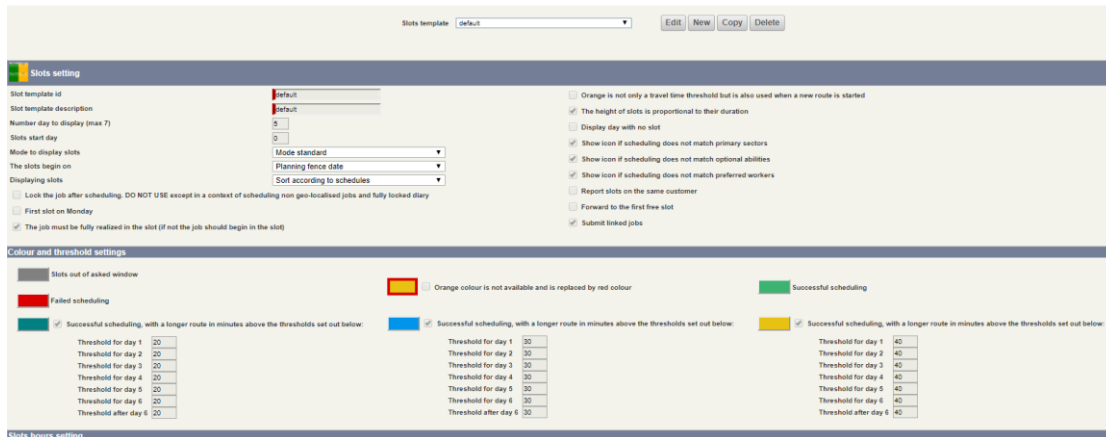


11.2.1 Slot Configuration

There are four configuration panes within the Slot Configuration area.

Slot Setting contains the rules and system constraints that will define how the slots are used in the Scheduling Solution

Colour and Threshold Settings define the colours of the Booking Slots and when they will change colour based on the Scheduling Solution Result. Travel Thresholds are configured in minutes and are compared the calculated travel time between Jobs during the Scheduling Solution.



The screenshot displays the 'Slots setting' pane with various configuration options. The 'Slot template id' is set to 'default'. The 'Slot template description' is 'default'. The 'Number day to display (max 7)' is set to 5. The 'Slots start day' is set to 'Monday'. The 'Mode to display slots' is set to 'Mode standard'. The 'The slots begin on' is set to 'Planning fence date'. The 'Displaying slots' section includes checkboxes for 'Lock the job after scheduling. DO NOT USE except in a context of scheduling non geo-localised jobs and fully locked diary', 'First slot on Monday', and 'The job must be fully realized in the slot (if not the job should begin in the slot)'. The 'Colour and threshold settings' section includes checkboxes for 'Slots out of asked window', 'Failed scheduling', 'Successful scheduling, with a longer route in minutes above the thresholds set out below', 'Orange colour is not available and is replaced by red colour', and 'Successful scheduling, with a longer route in minutes above the thresholds set out below'. The 'Slots hours setting' section includes a table for setting time periods for each day of the week.

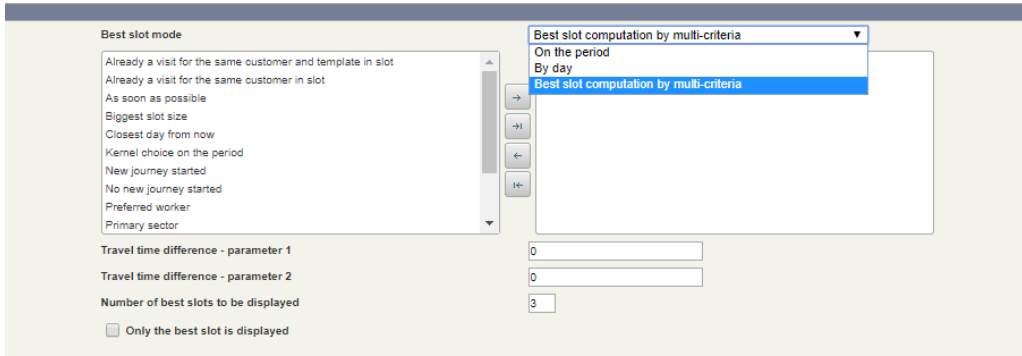
Day	08:00	12:00	14:00	18:00
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Slots Hours Setting determine which slots or time periods will be offered for the Job Booking and which time periods will be used by the Scheduling Solution to determine efficiency and best fit.



Day	08:00	12:00	14:00	18:00
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Best Slot Settings allow you to dictate how DRS will determine which calculated slot will be the best slot.



11.3 Views

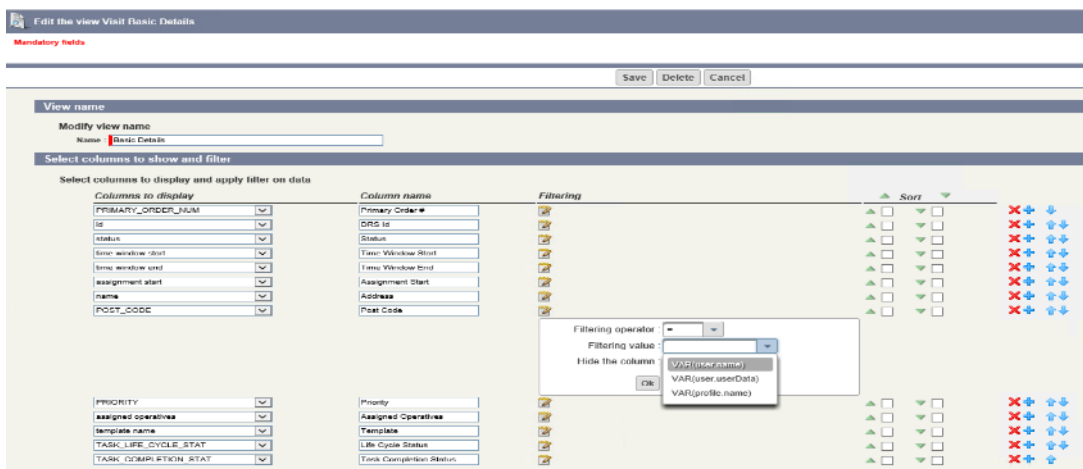
Views are used across most Tabs in DRS to control the level or type of detail displayed in the Detail Pane. Views can be User defined through the Configuration Tab, or, User created through the New View option to the left of the View dropdown, or a combination of both.

Views can be attached to a User or Profile. There are three View types that can be configured, System, Global and User. Each view level can be configured to be accessed as required. There are a number of pre-defined Views within DRS, please take the time to review what is available.

11.3.1 Configuring Views

To create New Views or configure existing Views, click NEW or select the View from the available list.

The first pane within the View configuration screen determines which columns are available for the user when the view is selected. The columns can be renamed from their System name and default filtering options can be put in place. You can also re-Order columns once entered, add or remove columns and sort data by default.



The second pane allows you to set what Status filtering you would like to apply to the View and a timeframe associated with the view.

Elements from visits

Data display, by default, from visits status and assignments

Status filter


Can show status criteria

Can show past

In schedule
Outside schedule
New
Suspended
Manually suspended
Automatically suspended
Suspended after re-optimization


All since today

All

 The usage of see 'all' is not recommended. It should be used carefully.

The third pane allows you to configure Complex Filtering, Default View settings and whether the view will allow Searching on past Jobs.

Complex filtering

Add the elements of complex filtering 

Context of use

Choose the context of use of this view

☐ This view is a search view (allow to view past objects)

☐ Set as default view for main lists

☐ Set as default view for visits sublist on property

☐ Set as default view for visits sublist on job

☐ Set as default view for visits sublist on operative

☐ Set as default view for object selector

☐ Set as default view for search

☐ Show recurrent visit template

The final pane allows you to allocate this view to Profiles. These profiles will be linked to Users and therefore the View will then be available to the User.

<input type="checkbox"/>	Id	Name
<input checked="" type="checkbox"/>	Administrator	To be used for administrators
<input type="checkbox"/>	Call Centre	Call Centre
<input type="checkbox"/>	Contact Centre	Contact Centre
<input type="checkbox"/>	Jump	Jump
<input type="checkbox"/>	Planner	Planner
<input type="checkbox"/>	Read Only	Read Only
<input type="checkbox"/>	Senior Planner	Senior Planner
<input type="checkbox"/>	Standalone	Standalone
<input type="checkbox"/>	Stores	Stores
<input checked="" type="checkbox"/>	User	To be used for standard users

11.4 Planning Shortcuts

Planning shortcuts can now be edited and shared globally by accessing the Planning Shortcuts link within the Configuration tab.

Type: Personal Shortcuts * [show all personal shortcuts: 0]

		Name	Time Period	Start Date	Worker Names
		Steven's Crew	Day	01/05/2019	Roger Keynes, Colin Connor, Dewey Swanson, Andrew Datto
		AP Plankbuck	Day	01/05/2019	Roger Keynes, Colin Connor, Dewey Swanson, Andrew Datto
		Breakers	Day	01/05/2019	Roger Keynes, Colin Connor, Dewey Swanson, Andrew Datto
		Static Men	Day	01/05/2019	Roger Keynes, Colin Connor, Dewey Swanson, Andrew Datto
		Tommy's Journey	Day	10/04/2019	Roger Keynes, Colin Connor, Dewey Swanson, Andrew Datto

Personal shortcuts can be edited or configured as a Global Shortcut by selecting the spyglass and making the appropriate changes.

Shortcut name: Save Cancel

Modify shortcut name

Shortcut Summary

Type: Planning
Time Period: Day
Start Date: 01/05/2019
View: Standard

Selected workers

Select workers for shortcut

	Order	ID	Name
<input checked="" type="checkbox"/>	1	W1000	Roger Keynes
<input checked="" type="checkbox"/>	2	W1001	Colin Connor
<input checked="" type="checkbox"/>	3	W1003	Dewey Swanson
<input checked="" type="checkbox"/>	4	W1004	Andrew Datto
<input type="checkbox"/>		W003	XMBRACETEST
<input type="checkbox"/>		W1002	Percy Lloyd

Shared Details

Modify is shared value

Is Shared: ☐

Save Cancel

If the 'is Shared' option is selected, this will enable the security profiles to share the Global Shortcut with. You can select the appropriate profiles to share the view with and click Save to commit.

Shared Details

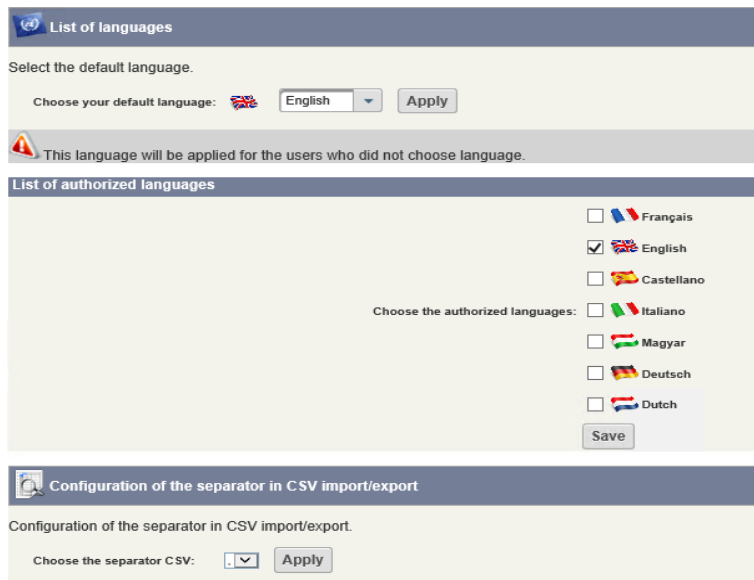
Modify is shared value

Is Shared: ☐

NOTE: If you set any shortcut as 'Shared', this will replace any personal shortcut for any users who have a shortcut of the same name and are within the enabled Profiles for the shared shortcut.

11.5 Language

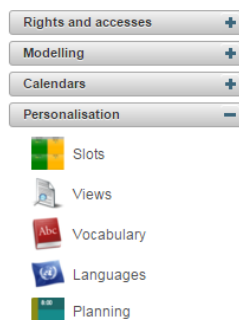
The language for your DRS installation should be configured at time of installation. Please consult your Kirona Project Manager or Kirona Support before making changes to this menu.



12 Planning

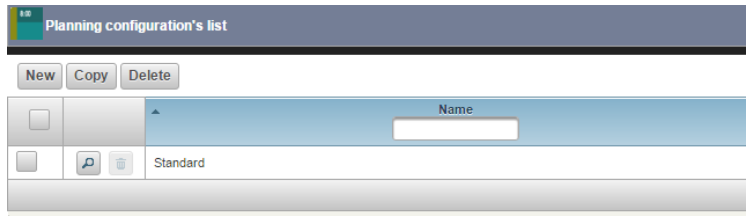
The Planning menu allows you to create Different Planning Views. There are Multiple Data Fields available to configure on.

To begin, Select Planning from the Personalisation Menu.



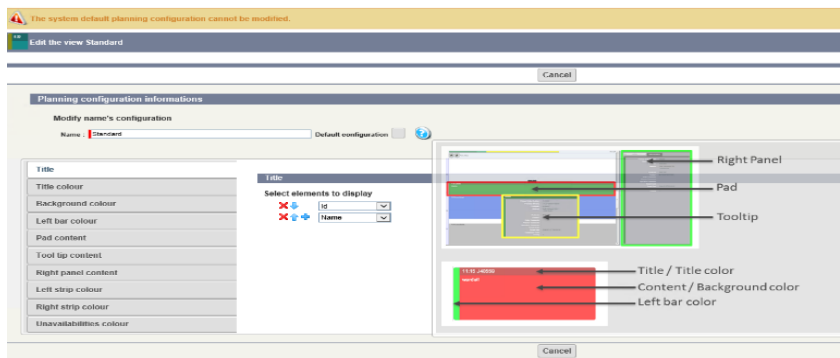
12.1.1 Configuring a view

The Standard Planning View cannot be Edited or Deleted. If you wish to Create or Modify a view, you will need to create a new view by selecting the New option from the top menu.



To view an existing Planning configuration, select the Magnifying glass associated with the Planning configuration.

To copy a configuration, check the select box and select Copy. Name your configuration and select Save.



The Planning Configuration view is made up of multiple Panes. To the left are the options for configuring the view. To the right are the values you can modify within this option. The image above indicates the fields to which the Menu options configure.

12.1.2 Data Sets

You can edit your Planning view to include data from the following data sets

- Customer
- Order
- Job
- Worker
- Worker Request

- Address

12.1.3 Diary View Configuration

You can edit the Collar Colour, Default Title and Information and Status Colour of the Jobs within the Diary view.

To do this, use the Options Title Colour, Background Colour and Left Bar Colour in the menu.

Title

Title colour
Background colour
Left bar colour

Complex filtering can be achieved on Background Colour and Left Bar Colour menus.

The Background Colour menu will allow you to dictate changes based on variables within the Job. In this example, we are modifying the colour of the Background based on the Status of the Order, however, we could also modify this based on many other values by changing the Switch value.




















18 Edit the view VAHT Standard

Save Save and Continue Cancel

Planning configuration informations

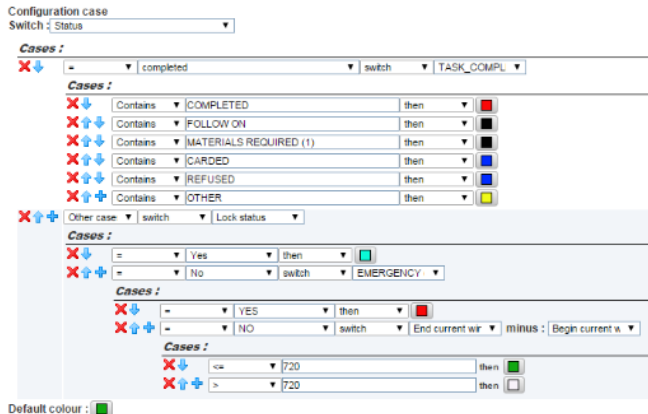
Modify name's configuration

Id VAHT Standard Description VAHT Standard Default configuration ☒ ?

Title	<p>Background colour</p> <p>Configuration case</p> <p>Switch : Status</p> <p>Cases :</p> <table border="1"> <tr> <td>×</td> <td>↓</td> <td>=</td> <td>planned</td> <td>↓</td> <td>then</td> <td>↓</td> <td></td> </tr> <tr> <td>×</td> <td>↓</td> <td>=</td> <td>despatched</td> <td>↓</td> <td>then</td> <td>↓</td> <td></td> </tr> <tr> <td>×</td> <td>↓</td> <td>=</td> <td>accepted</td> <td>↓</td> <td>then</td> <td>↓</td> <td></td> </tr> <tr> <td>×</td> <td>↓</td> <td>=</td> <td>started</td> <td>↓</td> <td>then</td> <td>↓</td> <td></td> </tr> <tr> <td>×</td> <td>↓</td> <td>=</td> <td>completed</td> <td>↓</td> <td>then</td> <td>↓</td> <td></td> </tr> <tr> <td>×</td> <td>↓</td> <td>=</td> <td>undefined</td> <td>↓</td> <td>then</td> <td>↓</td> <td></td> </tr> </table> <p>Default colour : </p>	×	↓	=	planned	↓	then	↓		×	↓	=	despatched	↓	then	↓		×	↓	=	accepted	↓	then	↓		×	↓	=	started	↓	then	↓		×	↓	=	completed	↓	then	↓		×	↓	=	undefined	↓	then	↓	
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Tool tip content																																																	
Right panel content																																																	
Left strip colour																																																	
Right strip colour																																																	
Unavailabilities colour																																																	

Save Save and Continue Cancel

Modifying the Left Bar Colour value allows for further, more complex filtering based on many variables within the Order. In this example we are modifying the colour based on the type of Completion Status DRS has received for the Job. If we wished to display other values, we would change the value in the Switch dropdown menu.



The screenshot shows the 'Configuration case' window with 'Switch : Status' selected. The 'Cases : ' section contains several rules for the 'Left bar colour' based on completion status. The rules are as follows:

Condition	Then
Contains COMPLETED	Red
Contains FOLLOW ON	Black
Contains MATERIALS REQUIRED (1)	Black
Contains CARDED	Blue
Contains REFUSED	Blue
Contains OTHER	Yellow

Below these, there is an 'Other case : ' section with a 'switch' dropdown set to 'Lock status'. This section contains further conditional rules:

Condition	Then
= Yes	Green
= No	Switch to EMERGENCY

The 'EMERGENCY' case further contains rules for 'End current wir' and 'Begin current w' based on YES/NO conditions, leading to 'minus' or 'plus' actions.

12.1.4 Pad Content

The Pad Content option allows you to dictate what will be displayed within the Scheduling Pads during booking.



The 'Pad content' window shows a list of elements to be displayed within the scheduling pads. The elements are:

- Title
- Title colour
- Background colour
- Left bar colour
- Pad content

Below the list, there is a 'Select elements to display' section with a '+' button and a dropdown menu currently showing 'Name'.

12.1.5 Planning Tool Tip

The Planning Tool Tip option allows you to modify and configure the information displayed within the Tool Tip box that displays when you hover over a Job in the Planning Diary.

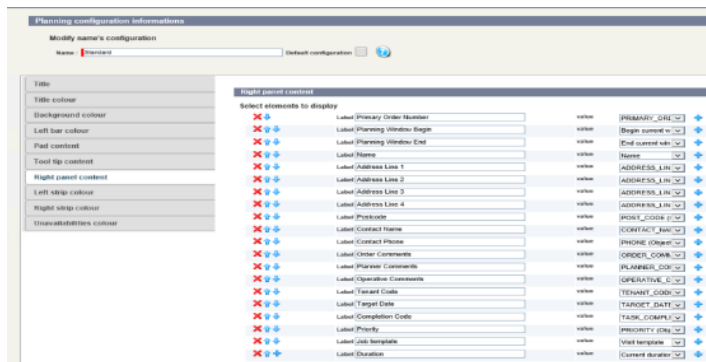
You can modify the Order, Content and Display Names here, similar to configuring a View.

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12.1.6 Planning Right Panel Content

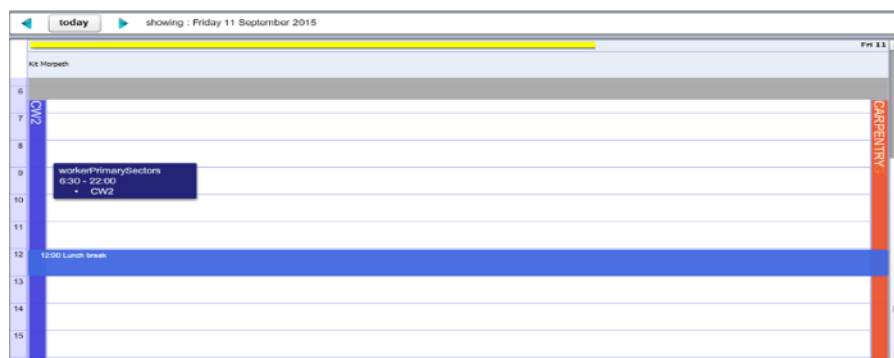
The Planning Right Panel Content option allows you to modify and configure the information displayed within the Right Panel within the Diary Views.

You can modify the Order, Content and Display Names here, similar to configuring a View.



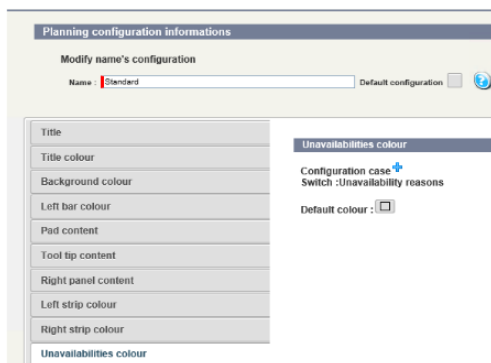
12.1.7 Planning Left Strip and Planning Right Strip Colour

These two options allow you to add a colour bar to the Diary View which will quickly allow you to discern information about the Workers Diary loading without clicking into the diary. Modifying these values would result in a potential Diary view below.



12.1.8 Unavailability's

The Unavailability's Colour will configure the colour of any Unavailability within the Diary View. Like other options, you can add Case values to show different Unavailability Reasons as different colours.



13 Utilities

13.1 Contract Management

Contract Management was previously a database only configuration setting which has been given a front end access point for v5.7.

Contract Management can be used to redirect interface exports, both flat file and webservice, to locations which are different from the default.

Your existing configuration will display in this list if it is available.



For more information, speak with your Kirona Account Manager or Kirona Project Manager.

13.2 Follow On

The Follow On screen can now be customised to include any fields which you would like populated during the Follow On Process.

By selecting the Follow On menu, you can modify your screens by selecting EDIT, making your changes and then selecting SAVE.

Case Detail

Follow on job template

Name: default Allow on completed order: Yes No

Allow on cost on change: Yes No Allow on new item changes: Yes No

Calculation from job status: From parent job _job_status allowed: Accepted, Completed, Engaged, Planned, On Hold

Business data configuration

Item data: Item type:

Columns: X Head: 1 Map: 0 Refresh: Export: 0

ID	Name	Description	Data status	Calendar value	Display mode	Allowed values	Inventory	Position
1	ACTOR_CODE	ACTOR_CODE	Customized		Hidden		Hidden	0
2	APPROVED_BY_REASON	APPROVED_BY_REASON	Customized	FOLLOW ON	Hidden		Hidden	0
3	APPROVED_BY_REASON	APPROVED_BY_REASON	Customized	FOLLOW ON	Visible	FOLLOW ON/NOT	Hidden	1
4	BOOKING_STATUS	BOOKING_STATUS	Hidden		Hidden		Hidden	0
5	BOOKING_TIME	BOOKING_TIME	Hidden		Hidden		Hidden	0
6	BOOKING_TIME	BOOKING_TIME	Hidden		Visible	Hours	Hidden	2
7	FOLLOW_ON_REASON	FOLLOW_ON_REASON	Customized		Hidden		Hidden	0
8	BOOKING	BOOKING	Hidden		Hidden		Hidden	0
9	BOOKING	BOOKING	Hidden		Hidden		Hidden	0
10	LAST_UPDATED	LAST_UPDATED	Customized		Hidden		Hidden	0
11	OFFER_STATUS	OFFER_STATUS	Hidden		Hidden		Hidden	0

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NOTE: changes made will have immediate effect.

13.3 Advanced

The Advanced section of the Utilisation menu allows you to change core visual and Data Gathering settings.

Please ensure before changes are made to this section that you have consulted your Kirona Account or Project Manager.

14 Text Messages and services

14.1 Scheduled Services

Scheduled Services allow you to configure a request which will be executed on a pre-arranged sequence, such as, updating the status of certain tasks on a given type of job template every evening, for operatives who are non mobile.

For more information, speak with your Kirona Account Manager or Project Manager.