



# DRS V6 Release Notes

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## Revision History

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Version	Description	Date	By
0.1	First Draft	May 2021	KE
0.2	Revised Draft	May 2021	AD
1.0	Final Release	June 2021	AD
1.1	Minor Screenshot Updates	June 2021	AD
1.2	Further minor additions and clarifications	July 2021	AD

## Summary

This document describes the functional changes made to DRS for V6.

V6 sees a rewrite of the entire User Interface of DRS. The fundamental solution and considerations of the Application remain the same.

Certain elements of V6 were pre-released in 5.7 as we needed to remove all Adobe flash programs. These screens were:

1. The diary
2. The booking hub and slots (Show Scheduler)
3. Button functions:
  - a. SMS to the contact
  - b. SMS to the worker
  - c. Update comments
  - d. Follow on
  - e. Possible Workers (5.7 Diary only)
  - f. User Queue
  - g. Update contact details
  - h. Update job status
  - i. Send worker job
  - j. Task Despatch Interface
  - k. Absence Confirmation
  - l. Set Planning fence
  - m. Daily Unavailabilities
4. Import Export
  - a. History
  - b. Services and text messages
5. Configuration
  - a. Contract Management
  - b. Follow On
  - c. Advanced settings
  - d. Text Messaging Parameters
  - e. Text Message Templates
  - f. Scheduled Services

These screens were detailed in the 5.7 Release Notes. A copy of the 5.7 User Guide is included for further guidance on this functionality. This functional detail will not be included in detail in this document unless there is additional change to the functionality, for example, the inclusion of the Gantt on the diary.

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## Change History

There are a total of 947 Jira Tasks associated with this release. For brevity, they are broken down into the following categories.

Priority	Jira Count
Priority 1	9
Priority 2	25
Priority 3	905
Priority 4	7

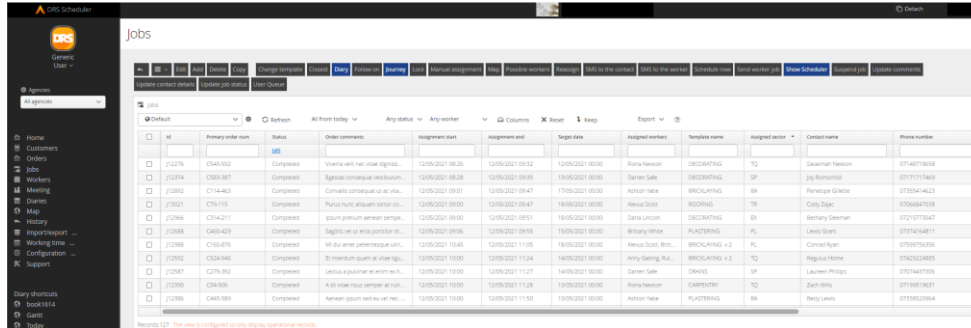
Due to the nature and size of the release, Jiras will not be listed individually.

## Navigation

### Getting Around

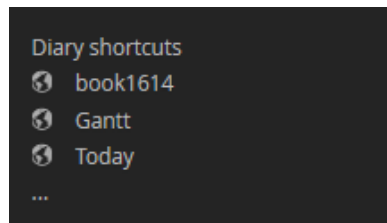
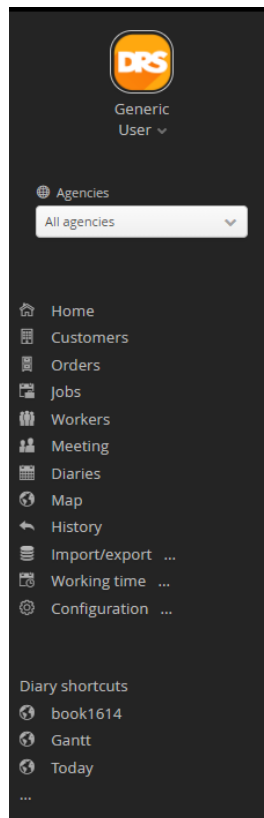
The Navigation of V6 is managed through a series of static buttons and lists.

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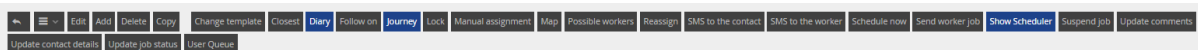


The screenshot shows the 'Jobs' page in the DRS Scheduler application. It features a table with columns for ID, Primary order ref, Status, Order comments, Assignment start, Assignment end, Target date, Assigned workers, Template name, Assigned sector, Contact name, and Phone number. The table contains several rows of job data, including job IDs like 12275, 12274, 12282, 12321, 12346, 12348, 12388, 12392, 12397, 12390, and 12386. Each row shows the job's status (e.g., Completed), order comments, and assignment dates. The interface also includes a left sidebar with navigation options like Home, Customers, Orders, Jobs, Workers, Meeting, Diaries, Map, History, Import/export, Working time, and Configuration. At the bottom of the sidebar, there are 'Diary shortcuts' for 'book1614', 'Gantt', and 'Today'.

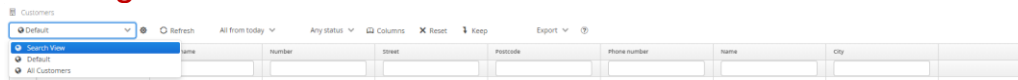
The main application navigation is performed by selecting the appropriate option from the Left Menu. Diary Shortcuts are also found at the bottom of the Left Menu



All screens contain a series of buttons which perform the available functions. The buttons available to you in your solution will be based on your configuration, menu selection and profile security settings.



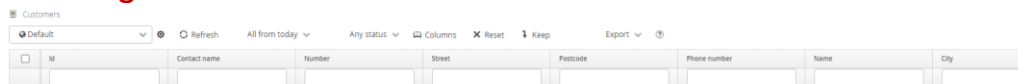
## Viewing Data



Data can be filtered by selecting an option from the VIEW combo box. Other options along the top menu allow you to filter by the Time Period and Status. Selecting the COLUMNS option allow you to modify the columns available within the view for your current session.

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## Filtering Views



Filtering on Views can be achieved by entering your required values in the Filter boxes and pressing Enter.

If you are selecting a value from one of the Static Filters, select the appropriate option and the screen will refresh to show you your selected data.

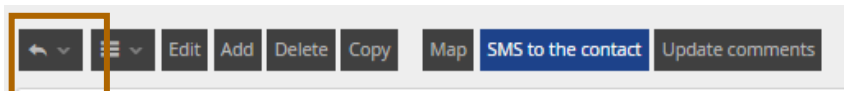
You can refresh your selection at any time by clicking the refresh icon.

## Scrolling vs Pagination

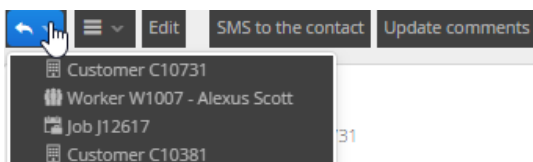
Access to the data not seen on a single screen is now controlled by scroll bars on the right side of the various data tables. There is no pagination in DRS v6. All data returns are limited to 1000 records Maximum but where more detail is available, this can be accessed through filtering or the use of the Export function.

Adding additional Filters to limit your result return can also display any required data.

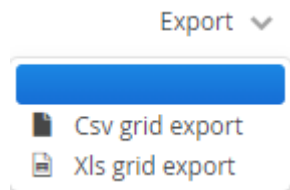
## Back Button



The Back Button can be found on all menus where table data is displayed. You can use this to navigate back through your previous selections. Clicking on the chevron will display the last selected objects. Clicking one will take you to that object.



## Exporting View Data



All views can now be exported by selecting an option from the **EXPORT** dropdown. You can export your views to CSV and XLS format.

**NOTE:** Excel can only open files with a maximum row count of 64,000 when in .xls format. To export more than 64,000 records, use the CSV export option and then either Open or Import this file with a version of excel greater than Excel 2007.

## Object Inheritance

DRS V6 leverages Object Inheritance to a greater extent than previous versions and as such, it is important to have an understanding on this function.

Feature Access is inherited down. As such, the Inheritance for Permissions works as such.

Support > Screens and Features > User Profile

Anything disabled at the Support level will over-ride the provision at the Screens and Features Level. Equally, anything disabled at the Screens and Features Level will disable any provision at the User Profile Level.

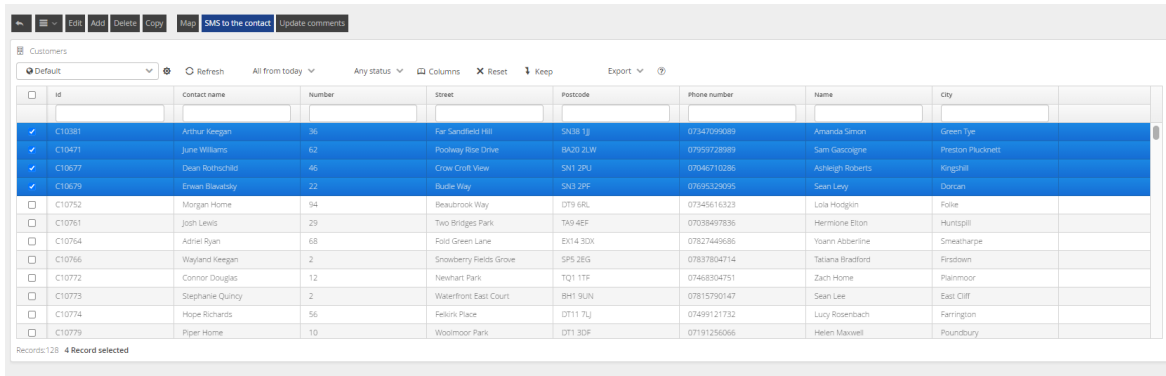
For Object Attributes, configuration is inherited Up, most restrictive to least restrictive. As such, the Inheritance for Attribution is as follows.

Users > Profile > Template > Object > Global

Therefore, anything that is configured at the User level will over-ride any other configuration set at any other level. In this way, different users can have a differing user experience.

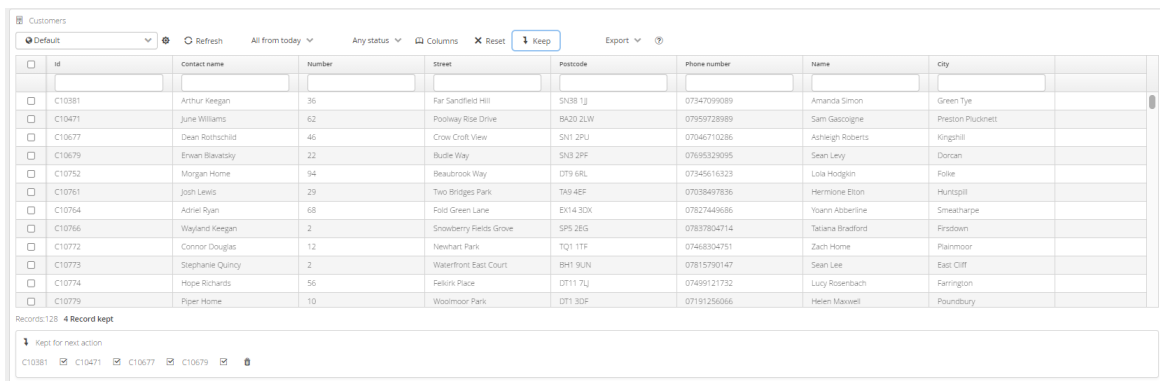
## Keep

The keep function allows you to place items within a held list while you work within the categories DRS v6.



id	Contact name	number	street	Postcode	Phone number	Name	City
C10381	Arthur Keegan	36	Far Sandfield Hill	SN38 1J	07547099089	Amanda Simon	Green Tyne
C10471	June Williams	62	Poolway Rise Drive	BA20 2LW	07559728989	Sam Gascoigne	Preston Pucknett
C10677	Dean Rothschild	46	Crow Croft View	SN1 2PU	07046710286	Ashleigh Roberts	Kingshill
C10679	Erwen Blawatsky	22	Buckle Way	SN3 2PF	07695329095	Sean Levy	Dorcan
C10752	Morgan Home	94	Beaubrook Way	DT9 6RL	07545616323	Lola Hodgkin	Folke
C10761	Josh Lewis	29	Two Bridges Park	TA9 4EF	07038497836	Hermione Elton	Huntspill
C10764	Adriel Ryan	68	Fold Green Lane	EX14 3DX	07827449686	Yoann Abberline	Smeatharpe
C10766	Wayland Keegan	2	Snowberry Fields Grove	SP5 2EG	07837804714	Tatiana Bradford	Firsdawn
C10772	Connor Douglas	12	Newhart Park	TQ1 1TF	07468304751	Zach Home	Plainmoor
C10773	Stephanie Quincy	2	Waterfront East Court	BH1 9UN	07815790147	Sean Lee	East Cliff
C10774	Hope Richards	56	Felink Place	DT11 7UJ	07499121732	Lucy Rosenbach	Farrington
C10779	Piper Home	10	Woolmoor Park	DT1 3DF	07191256066	Helem Maxwell	Poundbury

Selecting your objects and then clicking KEEP from the top menu will put the values within the Keep List to allow you to make changes, send Text Messages, Schedule, and other bulk selection functions.



id	Contact name	number	street	Postcode	Phone number	Name	City
C10381	Arthur Keegan	36	Far Sandfield Hill	SN38 1J	07547099089	Amanda Simon	Green Tyne
C10471	June Williams	62	Poolway Rise Drive	BA20 2LW	07559728989	Sam Gascoigne	Preston Pucknett
C10677	Dean Rothschild	46	Crow Croft View	SN1 2PU	07046710286	Ashleigh Roberts	Kingshill
C10679	Erwen Blawatsky	22	Buckle Way	SN3 2PF	07695329095	Sean Levy	Dorcan
C10752	Morgan Home	94	Beaubrook Way	DT9 6RL	07545616323	Lola Hodgkin	Folke
C10761	Josh Lewis	29	Two Bridges Park	TA9 4EF	07038497836	Hermione Elton	Huntspill
C10764	Adriel Ryan	68	Fold Green Lane	EX14 3DX	07827449686	Yoann Abberline	Smeatharpe
C10766	Wayland Keegan	2	Snowberry Fields Grove	SP5 2EG	07837804714	Tatiana Bradford	Firsdawn
C10772	Connor Douglas	12	Newhart Park	TQ1 1TF	07468304751	Zach Home	Plainmoor
C10773	Stephanie Quincy	2	Waterfront East Court	BH1 9UN	07815790147	Sean Lee	East Cliff
C10774	Hope Richards	56	Felink Place	DT11 7UJ	07499121732	Lucy Rosenbach	Farrington
C10779	Piper Home	10	Woolmoor Park	DT1 3DF	07191256066	Helem Maxwell	Poundbury

Records 128 4 Record kept

Kept for next action

C10381 C10471 C10677 C10679

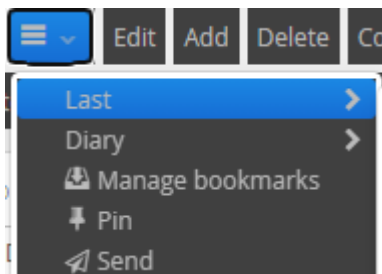
The Keep List can be cleared by clicking the Trash Can or individual items can be removed by clicking on the individual ticks next to the items in the list.

This function works largely in the same way for all screens where it appears.

These items can be used to interact with other functions such as Maps, Filtering, Schedule Now, Lock etc.

## Navigation Menu

The Navigation Menu contains the following options:



**Last:** Detail of the last items selected within the system. Navigate to these items by selecting one.

**Diary:** List of all available Diary Bookmarks

**Manage Bookmarks:** You can use this to edit or remove bookmarks, where your permissions allow.

**Pin:** Pin allows you to create a Bookmark of single or groups of items. More information on this function can be found in the BOOKMARKS section of this document.

**Send:** Selecting a single or number of items will allow you to send those items to other Users. When they are sent, they will appear within the other Users Bookmark list and a new item icon will be displayed to let them know it is available.



## Home

The DRS Home Screen now contains charts that can highlight important detail within your solution. If you are an Advanced Infosuite customer, charts can also be displayed within DRS from Infosuite.

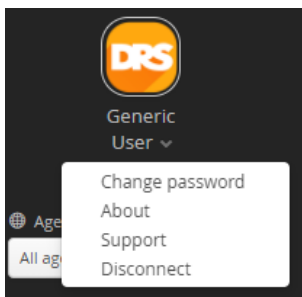
Configuration of this can be found in the CONFIGURATION section of this document.

Home



## Change Password

Changing your password is now done by clicking the chevron and selecting Change Password.



Once changed, Click Update.

Change password + x

Cancel

Update

Password

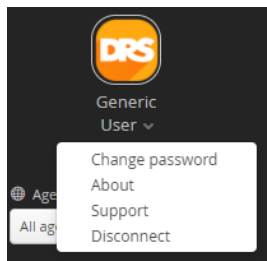
\*\*\*\*\*

Confirm password

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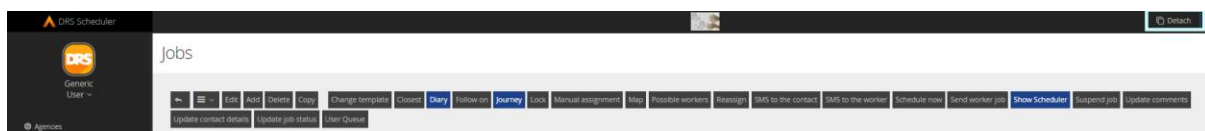
## Logging Off

Logging off can be achieved by clicking on the chevron below your User Name and selecting Disconnect.




## Detach


Using the Detach button will take DRS out into a new tab within your browser. This is a full instance of DRS and can be used independently for both read and modify tasks.

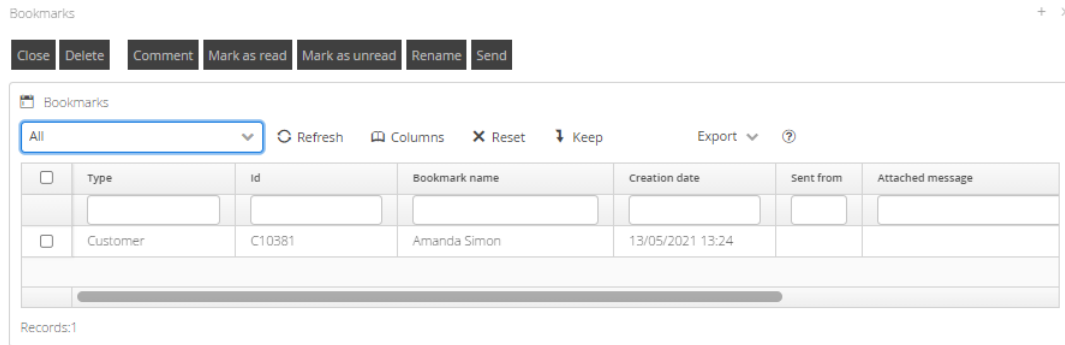


## Bookmarks

Bookmarks can be used in all objects in DRS V6 to mark and hold onto items which you wish to review or use later.

To add items to the Bookmark menu, on each of the possible menus a PIN option will be available in the Navigation menu . This will add all selected items into the Bookmark menu.

To view your Bookmarks, access the Navigation Menu  and select Manage Bookmarks.



From here you can access the items you have selected to Bookmark.

Using the Delete button will remove the item from your Bookmark menu, not from the DRS system.

## Version

The Version of DRS you are currently running can be found in the top right hand corner of your screen.

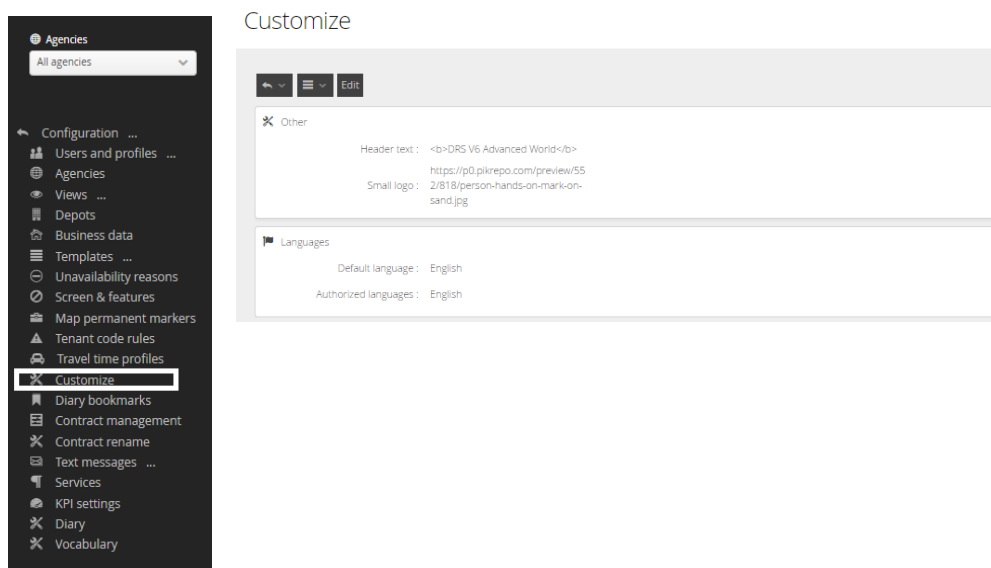


## Icon

The Icon and Header Text can be configured to allow you to customize the product to better match your business branding.

To do this, head to the Configuration option in the left menu and select Customize.

On the following screen, provide a network available link for your image and your preferred Header text. You can also amend the Languages available in this screen.



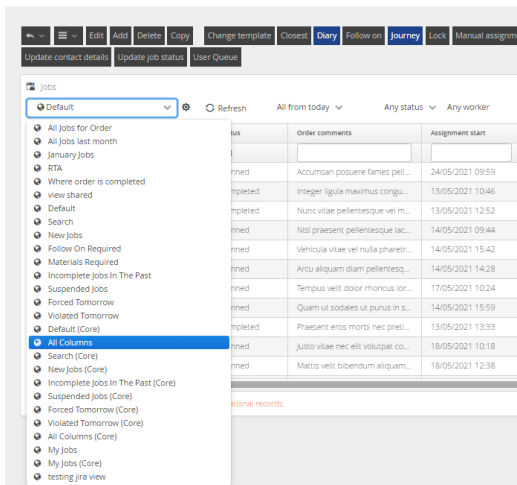
## User Auditing

The last user to schedule a task is now logged along with a timestamp of that scheduling within the database.


## Views

Views in DRS V6 perform same function as previous versions. Selecting the dropdown on any of the detail menus will display the available views for that menu.

Jobs



## User Defined Views

If your profile allows, clicking the COG icon  next to the Views dropdown will allow you to save any changes to the views you have made. This will allow you to create User Defined Views by completing the options on the resulting screen.

View editor

Save

View

Name:

Search view: Yes [No](#)

Editor

Schedule:

Schedule:

Visible columns Available columns Sort Filters

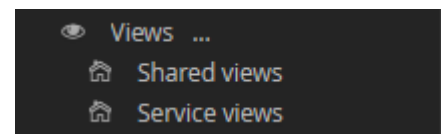
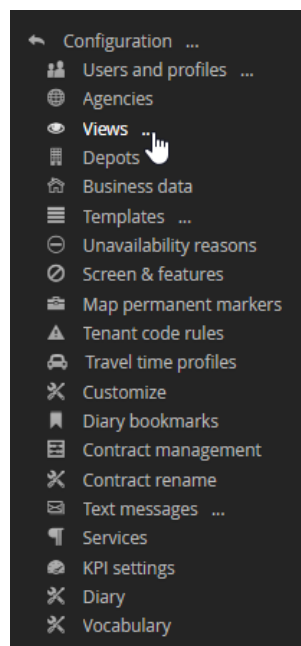
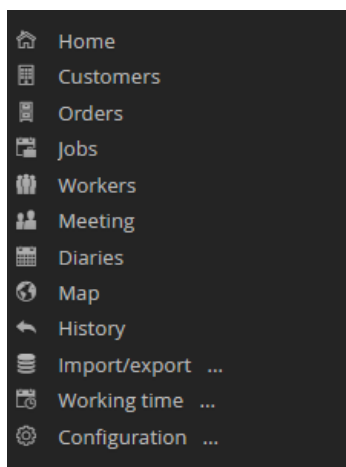
Filter Sort Hide

Index	Column	Caption	Size
0	Job - USERID	Id	85
1	ServiceOrder - BD_PRIMARY_ORDER_NUM	Primary order num	141
2	Job - STATUS	Status	115
3	ServiceOrder - BD_ORDER_COMMENTS	Order comments	200
4	Job - CURRENTASSIGNMENT_START	Assignment start	150
5	Job - CURRENTASSIGNMENT_END	Assignment end	150
6	ServiceOrder - BD_TARGET_DATE	Target date	150
7	Job - ASSIGNEDWORKERS	Assigned workers	131
8	Job - MODELNAME	Template name	134
9	Job - ASSIGNEDSECTOR	Assigned sector	121
10	ServiceOrder - CONTACTNAME	Contact name	200
11	ServiceOrder - PHONE	Phone number	200
12	Customer - ADDRESS_STREET	Street	200

Make your changes and enter a new Name for your view, then click Save. For more detail on configuring views, see the Configuring Views section.

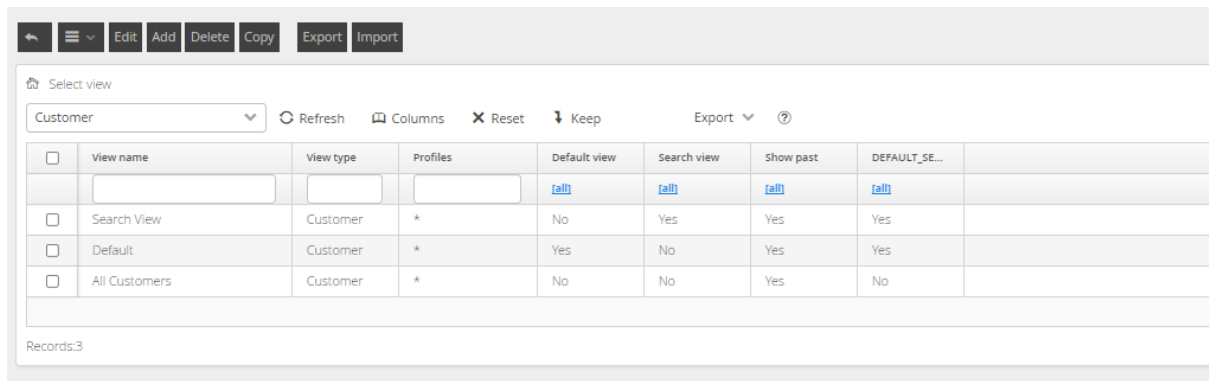
## Configuring Views

Configuring shared views is still done within the Configuration menu. Within this menu you can create both Shared Views for Object views (customer/job/worker) and also for Scheduled Services.



## Shared Views

From within the Shared Views menu, you can create a new view (Add), Delete an existing view (Delete), Copy an Existing view (Copy) and Edit an Existing View (Edit)



<input type="checkbox"/>	View name	View type	Profiles	Default view	Search view	Show past	DEFAULT_SE...
<input type="checkbox"/>	Search View	Customer	*	No	Yes	Yes	Yes
<input type="checkbox"/>	Default	Customer	*	Yes	No	Yes	Yes
<input type="checkbox"/>	All Customers	Customer	*	No	No	Yes	No

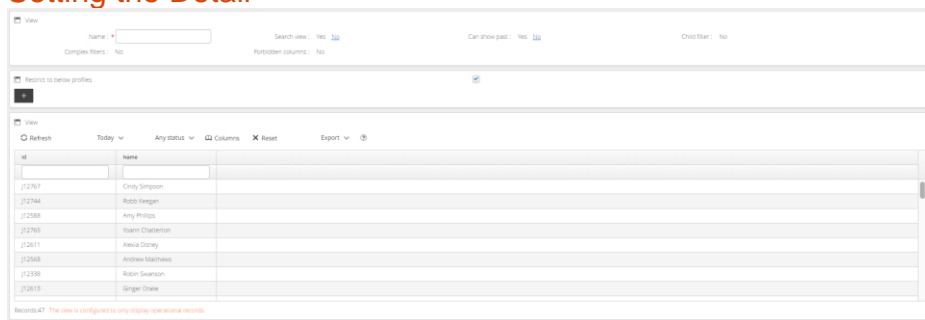
Records:3

You can also Export and Import view configurations from other instances of DRS, for example, transferring View configuration from Test into Live.

## Adding and Editing Views

Adding and Editing Views share a similar function set. To create a new view, click Add. To edit an existing view, select one from the list by checking the box and click Edit. In both cases, the following screen will be displayed.

### Setting the Detail



id	name	
12767	Emily Simpson	
12768	Bobb Keegan	
12769	Amy Phillips	
12770	Sarah Charleston	
12771	Anna Dorsey	
12772	Andrew Blackwell	
12773	Robin Swanson	
12774	Ginger Drake	

Records:47 The view is configured to only display operational records.

In the Edit function, the Name field will be pre-populated and will not be editable.

In the Add function, name your view by populating the Name field.

Setting the Can Show Past function to 'Yes' will allow the view to be an Anytime view. Without setting this, the view will only be allowed to display up to 30 days in the past.

### Setting the Profile Security

You can set views to be secured to each profile by enabling this function. Checking the box will enable this function. Leaving the Profile list blank will stop this view from being available to any users. To allow all users access to this View, leave the box unchecked.

Restrict to below profiles

+

To add a profile, click the  button.

Page | 23

Profiles

Cancel

Select

Profiles

Refresh

Columns

Reset

Keep

Export

<input type="checkbox"/>	ID	Name
<input type="checkbox"/>	Administrator	To be used for administrators
<input type="checkbox"/>	Call Centre	Call Centre
<input type="checkbox"/>	Jump	Jump
<input type="checkbox"/>	KT	KT
<input type="checkbox"/>	Planner	Planner
<input type="checkbox"/>	Read Only	Read Only
<input type="checkbox"/>	Reduced	Reduced
<input type="checkbox"/>	RO2	RO2
<input type="checkbox"/>	Role1	Test Profile for test role
<input type="checkbox"/>	Test	Test
<input type="checkbox"/>	User	To be used for standard users

Records:11

Check the profiles you would like to add and click Select.

Restrict to below profiles

+

To be used for administrators

☐

Call Centre

☐

Jump

☐

KT

☐


Planner

☐

+

You can remove profiles at any time by selecting the trash can.

## Setting the Columns

Setting the columns on a view is now done by clicking on the  **Columns** option in the header to open the Column Selector.

View

Refresh

Today

Any status

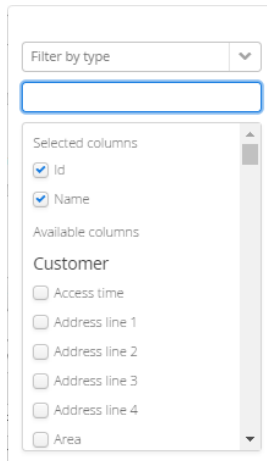
Columns

Reset

Export

ID	Name
J12767	Cindy Simpson
J12744	Robb Keegan
J12588	Amy Phillips
J12765	Yoann Chatterton
J12611	Alexia Disney
J12568	Andrew Matthews
J12338	Robin Swanson
J12613	Ginger Drake

Records:47 The view is configured to only display operational records.



When clicking the columns button, you can filter for the required columns by searching for values within the search box at the time.

Checking the values within the Available Columns section will select the column for view.

Unchecking the values from the Selected Columns section will remove the column from view.

## Column sorting

To set Sorts on your columns, click on the Column Header to display the sort icon.

<input type="checkbox"/>	Id	Primary order num	Status	<input checked="" type="checkbox"/>	Order comments	Assignment start	Assignment end	Target date	Assigned workers	Template name	Assigned sector	Contact name
--------------------------	----	-------------------	--------	-------------------------------------	----------------	------------------	----------------	-------------	------------------	---------------	-----------------	--------------

You can set multiple sorts by holding the SHIFT key and then selecting your Sort Columns. The sort will be applied in the order of your selection.

<input type="checkbox"/>	Id	↕ 2	Primary order num	Status	↕ 1	Order comments	Assignment start	↕ 3	Assignment end	Target date	↕ 4
--------------------------	----	-----	-------------------	--------	-----	----------------	------------------	-----	----------------	-------------	-----

## Column reorganization

Drag and drop the column to the appropriate position. It is also possible to open the column selector and drag & drop the columns in the order you want.

## View Editor

To set the advanced options for the View, click on the **Switch to editor** button. This will open the Editor screen.

Time and Status filtering defaults can be set using the following options:

To set the Default Time Filter, click on the Schedule : Any time drop down menu.

To set the Default Status shown, click on the Schedule : Any status drop down menu.

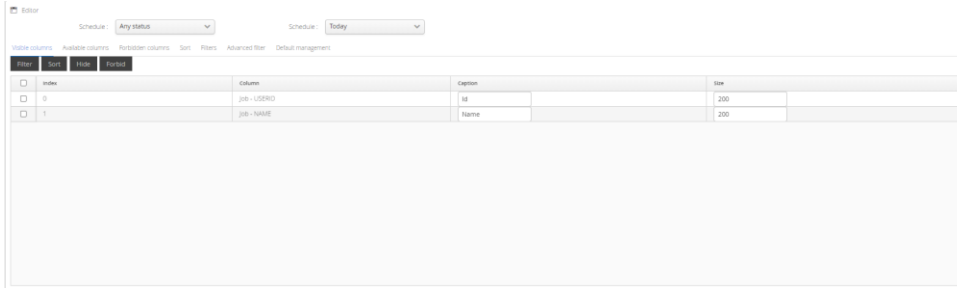
**NOTE:** To enter this screen, your View must have a name.



## Managing Visible Columns

The first tab shows the columns that have been selected in the initial setup screen. Here you can re-label them to your liking by updating the Caption field. Additional columns can be added from the Available Columns field.

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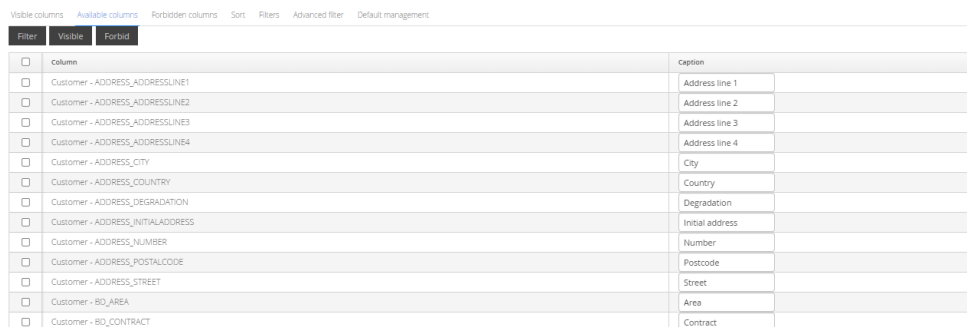


Column	Caption	Size
id	id	200
job-name	Name	200

## Available Columns

From this screen, you can scroll the list of available columns and select by checking the field to:

- 1) Add the column as a Filter Option (by clicking **Filter**)
- 2) Add the column to the Visible column list (by clicking **Visible**)
- 3) Restricting availability to the column (by clicking **Forbid**)

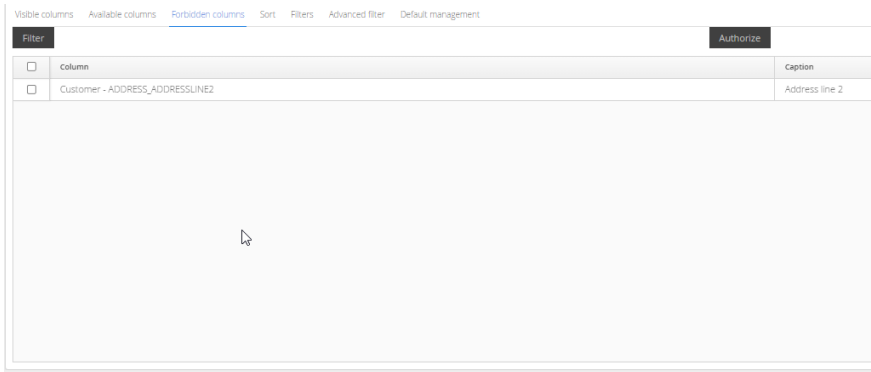


Column	Caption
<input type="checkbox"/> Customer - ADDRESS_ADDRESSLINE1	Address line 1
<input type="checkbox"/> Customer - ADDRESS_ADDRESSLINE2	Address line 2
<input type="checkbox"/> Customer - ADDRESS_ADDRESSLINE3	Address line 3
<input type="checkbox"/> Customer - ADDRESS_ADDRESSLINE4	Address line 4
<input type="checkbox"/> Customer - ADDRESS_CITY	City
<input type="checkbox"/> Customer - ADDRESS_COUNTRY	Country
<input type="checkbox"/> Customer - ADDRESS_DEGRADATION	Degradation
<input type="checkbox"/> Customer - ADDRESS_INITIALADDRESS	Initial address
<input type="checkbox"/> Customer - ADDRESS_NUMBER	Number
<input type="checkbox"/> Customer - ADDRESS_POSTALCODE	Postcode
<input type="checkbox"/> Customer - ADDRESS_STREET	Street
<input type="checkbox"/> Customer - BD_AREA	Area
<input type="checkbox"/> Customer - BD_CONTRACT	Contract

## Forbidden Columns

This will list all fields which are marked as Forbidden in the previous screen. From here you can check a value and;

- 1) Unforbid the column (click Authorize)
- 2) Add the column as a filter (click Filter)



Column	Caption
<input type="checkbox"/> Customer - ADDRESS_ADDRESSLINE2	Address line 2

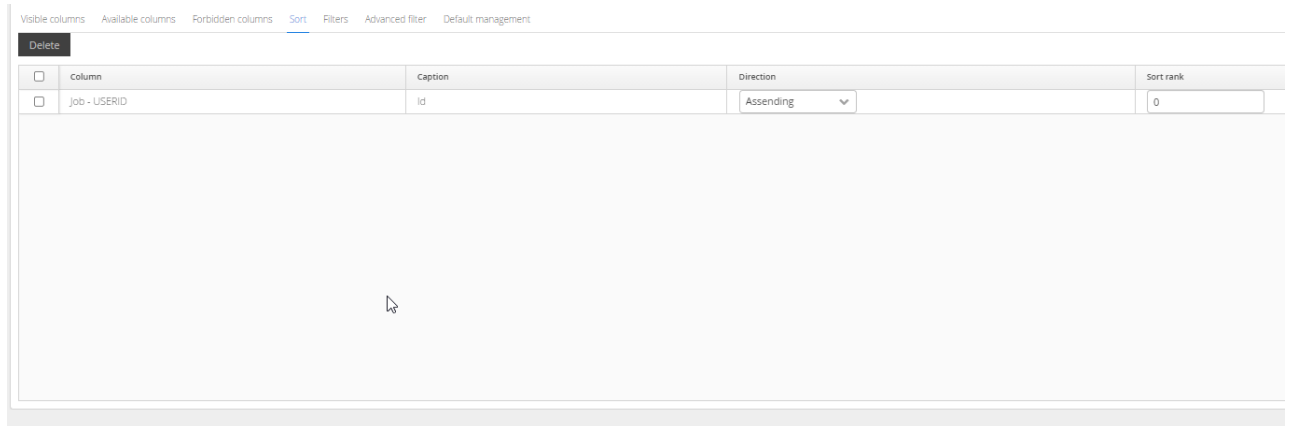
## Sorting

This will list all fields which have been marked for Sort from the Available Columns field. From here you can:

- 1) Set the Sort direction by changing the Direction dropdown box
- 2) Set the Ranking of the Sort by amending the Sort Rank (0 is highest priority)

**NOTE:** Sorting will be applied in the priority specified within the Sort Rank

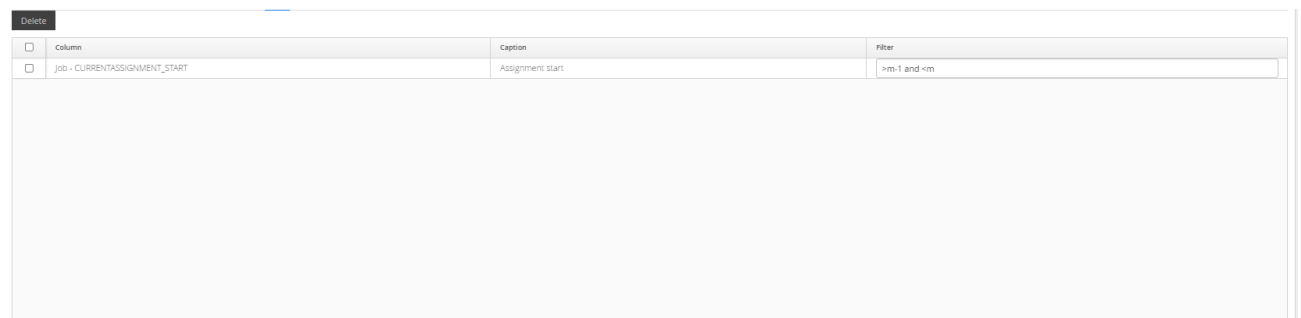
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The screenshot shows a web interface with a top navigation bar containing tabs: 'Visible columns', 'Available columns', 'Forbidden columns', 'Sort', 'Filters', 'Advanced filter', and 'Default management'. The 'Sort' tab is active. Below the tabs is a 'Delete' button. The main area contains a table with the following columns: 'Column', 'Caption', 'Direction', and 'Sort rank'. There is one row in the table with the following data: 'job - USERID', 'Id', 'Ascending', and '0'. Below the table is a large empty rectangular area.

## Filters

Filters can be added to any columns set as a filter from any of the previous tabs. You can free type your filter in the Filter column.



The screenshot shows a web interface with a top navigation bar containing tabs: 'Visible columns', 'Available columns', 'Forbidden columns', 'Sort', 'Filters', 'Advanced filter', and 'Default management'. The 'Filters' tab is active. Below the tabs is a 'Delete' button. The main area contains a table with the following columns: 'Column', 'Caption', and 'Filter'. There is one row in the table with the following data: 'job - CURRENTASSIGNMENT\_START', 'Assignment start', and '>m-1 and <m'. Below the table is a large empty rectangular area.

Your Filtering options will change based on the value within the field you are filtering on. Below is a full list of your filtering options.

## Filtering Operators

### String filtering

The following filtering operators can be used to limit your data return.

- operator: =, >, <, >=, <=, <> (different) eg. Assignment end > d+1
- logical operator: and/or eg. Job Template = Joinery or =Plumbing
- other operators: in(value1,value2...,valuen) eg. Job Template in (Plumbing, Joinery, Electrician)
- Boolean: \* eg. Name =Mike\* or =John\* or =\*Smith\*

## Number filtering

- operator: =, >, <, >=, <=, <>
- logical operator: and/or

## Page | 27 Date filtering

- operator: =, >, <, >=, <=, <>
- logical operator: and/or
- other operators: in(value1,value2...,valuen)
- day format: 12/03/2018 or 12/3/18
- day/time format : 12/03/2018 12:53 or 12/3/18 13:53
- d: today
- w: first day of the week
- m: first day of the month
- y: first day of the year
- modifier: d+1 = tomorrow, d-1 = yesterday, w-1 = previous week, w-1d = current week minus one day, d+1 09:00 = tomorrow at 9:00

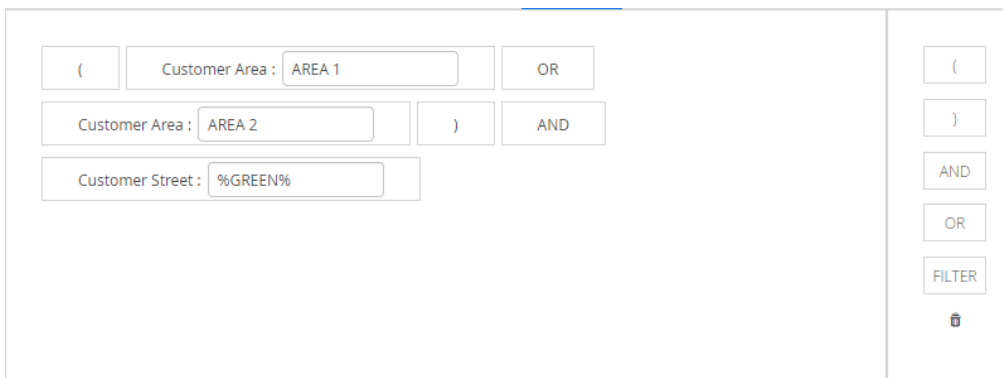
## Advanced Filtering

The Advanced Filter allows us to write complex conditional filters that can interact with each other. The primary difference between the Advanced Filter and the Filters tab is that the Filters on the Filters tab are applied sequentially. The Advanced filter can be applied in combination with or separate to each other.

Advanced Filtering and Standard Filtering can be configured on the same view. In this instance, the Standard Filtering will be applied before the Advanced Filtering.

To select the Objects to filter on, click the FILTER button. Here you can select from the available columns. Drag in the AND, OR, or Bracket Objects (, ), and complete the value fields that are made available.

You can use the same filtering options within this filter screen as explained in the FILTERS section above.



(

Customer Area : AREA 1

OR

Customer Area : AREA 2

)

AND

Customer Street : %GREEN%

(

)

AND

OR

FILTER

🗑️

## Default Management

The Default management section allows you to set the appropriate defaults for the view you are selecting. Simply set the appropriate values to YES or NO as needed.

Editor

Schedule: Any status Schedule: Any time

Visible columns: Available columns: Forbidden columns: Sort: Filters: Advanced filter: [Default management](#)

Default list: Yes [No](#) Picker default: Yes [No](#) Default search: Yes [No](#) Default for sub-customer list: Yes [No](#)

Default for sub-order list: Yes [No](#) Default for sub-worker list: Yes [No](#) Recurrent job template view: Yes [No](#)

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## Saving your Filter

By clicking on SWITCH TO GRID in the top menu bar, the changes resulting from your Editor configurations will be displayed, along with a sample of data that will be returned by your configuration.

[←](#) [≡](#) [Cancel](#) [Save](#) [Switch to grid](#)

Your filtering options as configured will also be displayed. Your Advanced Filter options will not be displayed.

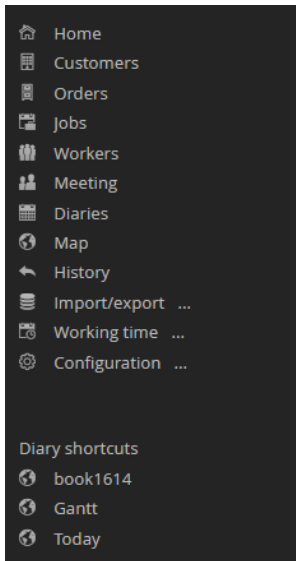
If you are happy with the changes made, click SAVE and your view will be available on the appropriate menu item.

View

Refresh Any time Any status Columns X Reset Export

id	name	assigned worker	assignment start	assignment end	notecode	city
1237	Henry Reeves	Ruth Adams	17/05/2021 16:55	PL	PL3 710	Holacombe Hill
1254	Ryan Ryan	Rohan Singhal	02/05/2021 08:07	SP	SP2 594	Netherhampton
1255	Nia Robinson	Rohan Singhal	02/05/2021 10:00	SP	SP2 594	Hanging Langford
1256	Ryan Michaels	Edgar Lindsey	02/05/2021 09:23	ST	ST2 324	Ringwood
1257	Lisa Dwyer	Gavin Sale	02/05/2021 08:17	SP	SP11 814	San Chelston
1258	Wendy Day	Tom Columbus	04/05/2021 08:22	BS	BS40 438	East Brim
1259	Oliver Lincoln	Dana Lincoln	04/05/2021 09:42	TA	TA24 845	Redburn
1260	Blair Kennedy	Edgar Lindsey	04/05/2021 11:11	TA	TA1 124	Wesley

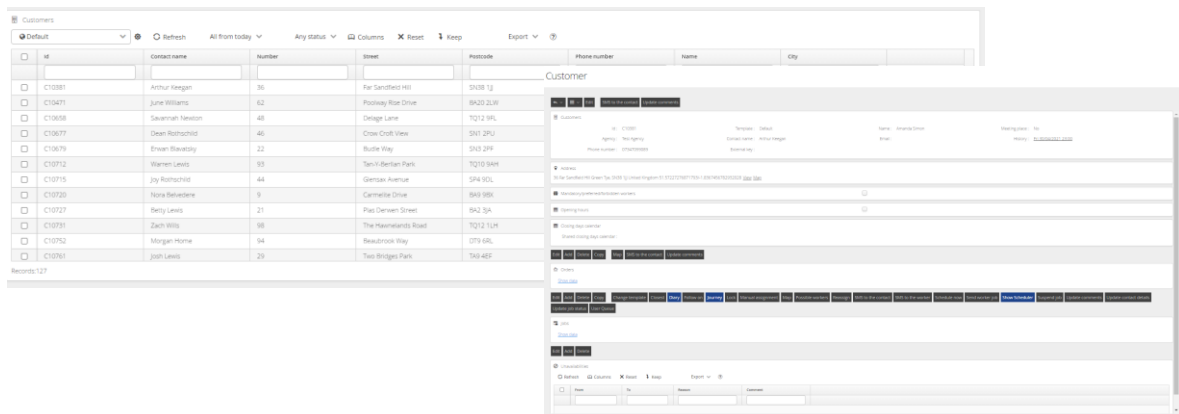
## Customers



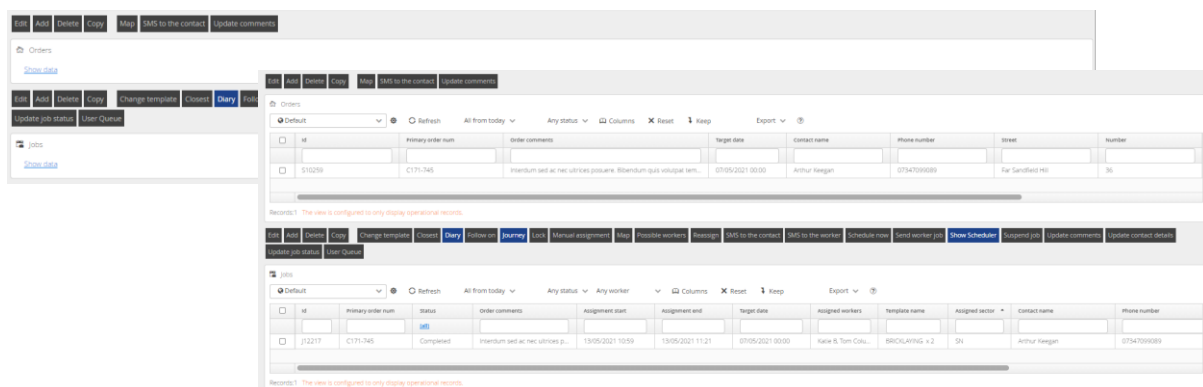
Details about your Customers can be found by selecting Customers from the Left Menu.

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Detail will be displayed within the information panel. Clicking on any value will take you through to the detail of that customer.

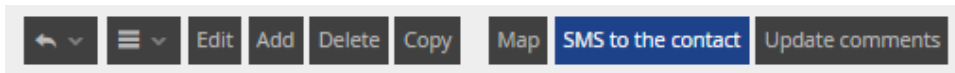


Expanding these Show ... items will expand the selection to view the available data



## Add/Edit/Copy

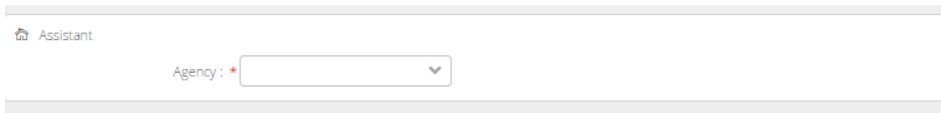
Add, Copy and Edit will allow you to Add or Modify an entry in this menu.



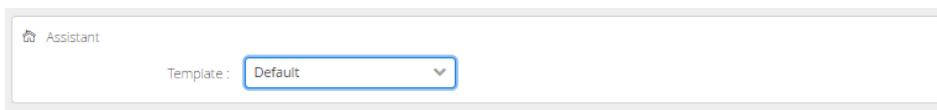
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Selecting any customer will allow you to use these functions to Amend, Copy or Delete that record.

Selecting Add or Copy will ask you to select the required Agency.

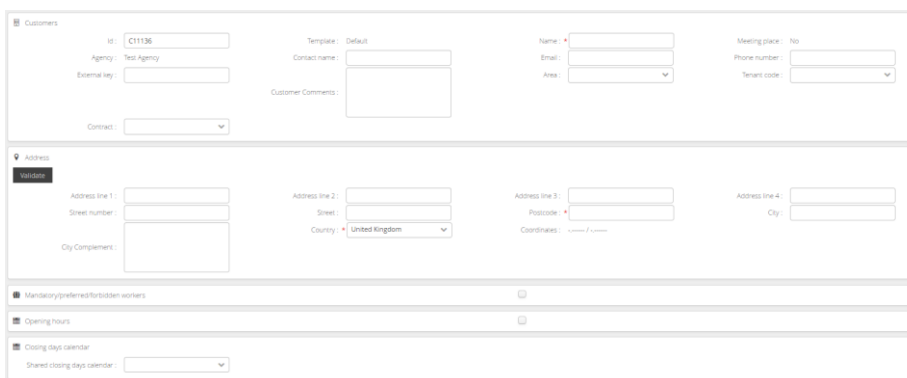


Then Select the appropriate Customer Template and then click NEXT.

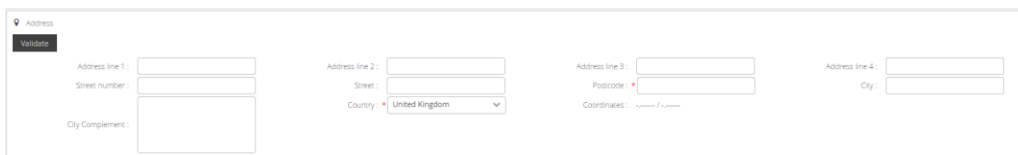


Complete all required fields in the following screen. Any screen marked with a \* are Mandatory. Every other field is optional but can still be completed if needed.


NOTE: The ID value must be unique.



Before saving, you must complete and validate the locations address. This location must have a valid Postcode as a minimum entry value. Once you have placed the postcode within the Postcode field, click Validate. If DRS confirms this postcode to be valid, the address longitude and latitude will be displayed.



If you are licensed for Maps, you can click on the Map function to confirm the location in the UK. Once you have completed the Customer data, click Save.



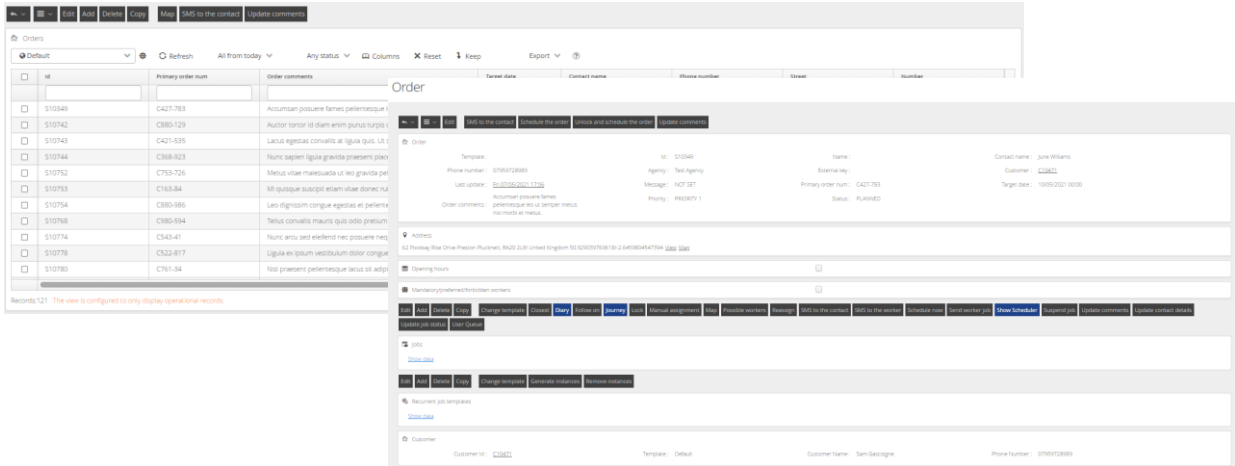
## Delete

Delete will remove the selected Object. This function cannot be reversed.

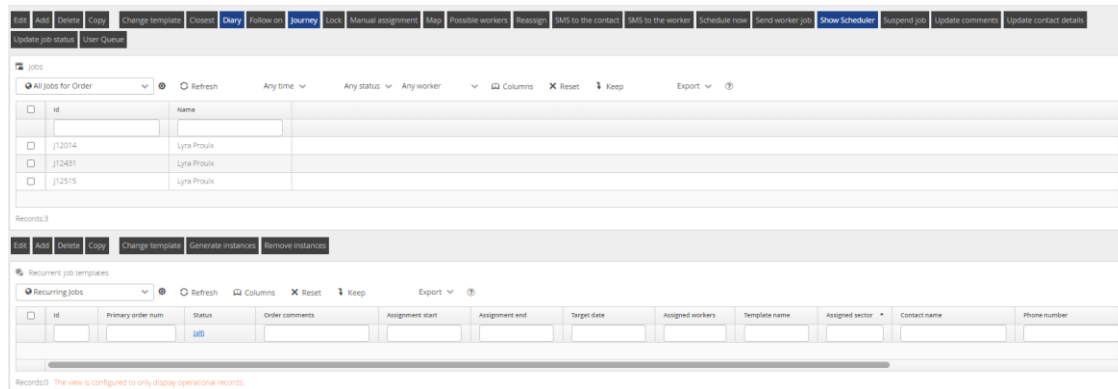
## Orders

Orders within DRS display using the configured default view when selected. Clicking on a single item will display the Order Details.

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Clicking on the links 'show data' will display the related data.

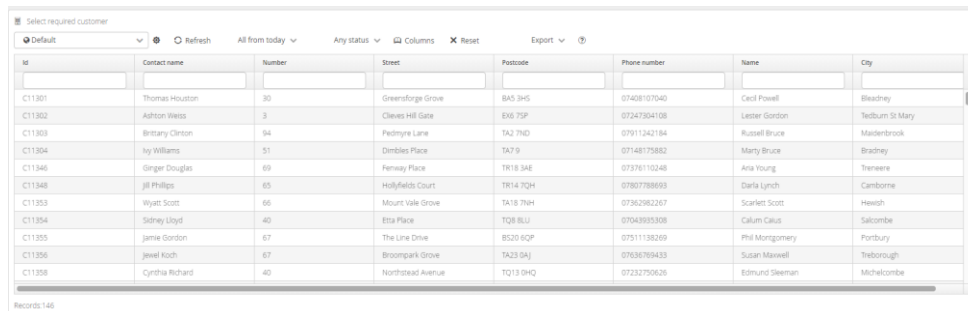


Functions within this view work the same as defined within the Jobs view.

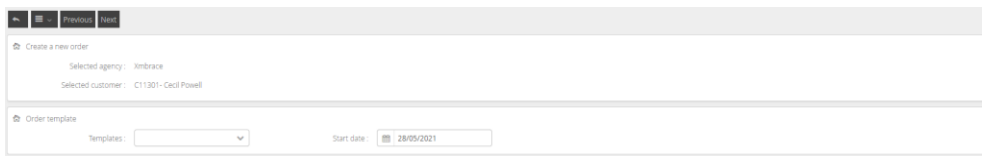
## Add/Copy/Edit

Add will require you to select your required Agency.

Then the required Customer. Use the filtering options to limit the return of options.

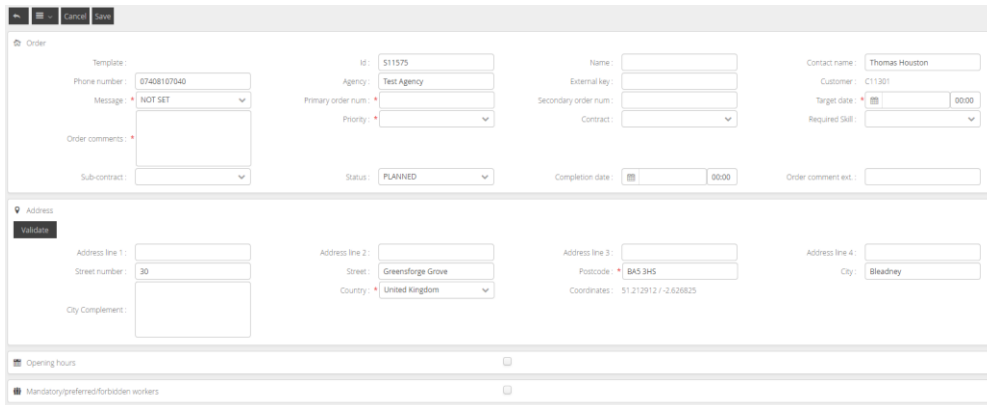


You will then be asked to select the required Template and Start Date.

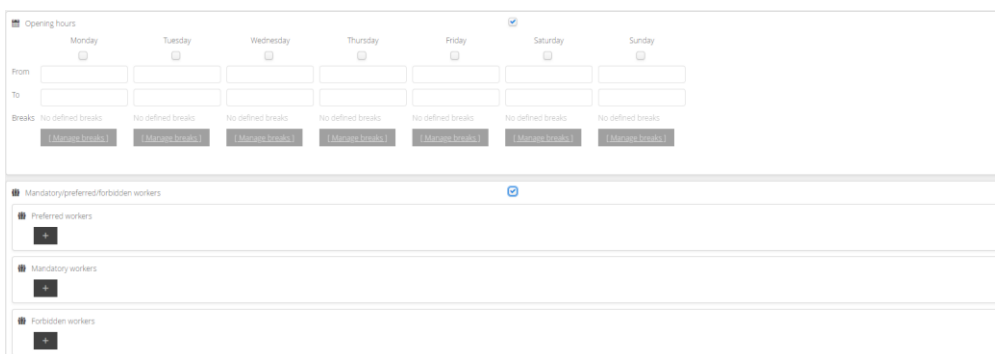



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Complete all required fields. Fields marked with a \* are Mandatory.



Enabling the checkbox for Opening Hours or Mandatory/Preferred/Forbidden workers will allow you to set some Advanced Options on the Order.



Use the checkboxes and  icon to complete your selections. To add Variabilities, review the section on Setting Variabilities.

## Delete

Delete will remove the selected Object. This function cannot be reversed.

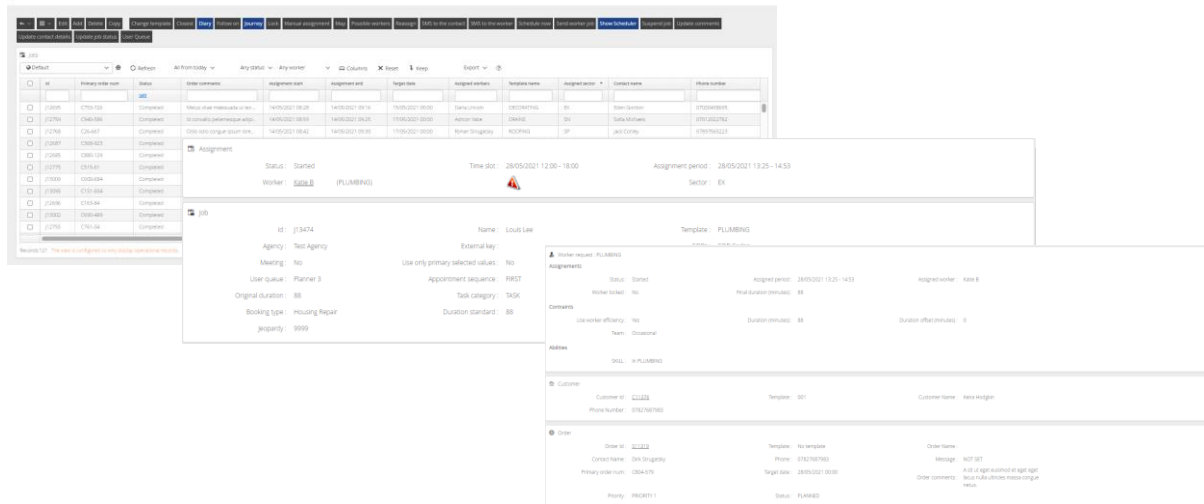


## Jobs

Jobs, when selected from the Left menu will be displayed with the default view. Selecting any item will display the detail for that job.

Jobs

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**Jobs List:**

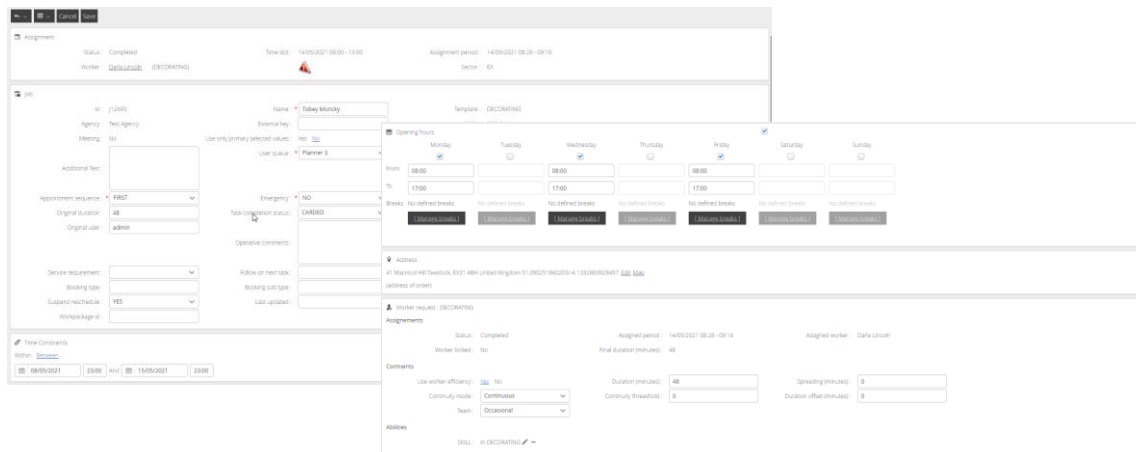
ID	Entry order	Status	Date	Assignment start	Assignment end	Start date	Assigned workers	Template name	Assigned sector	Contact name	Phone number
12588	12588	Completed	14/05/2021 08:28	14/05/2021 08:28	14/05/2021 08:28	14/05/2021 08:28	Darla Lincoln	DECORATING	EX	Darla Lincoln	0792767562
12589	12589	Completed	14/05/2021 08:28	14/05/2021 08:28	14/05/2021 08:28	14/05/2021 08:28	Darla Lincoln	DECORATING	EX	Darla Lincoln	0792767562
12590	12590	Completed	14/05/2021 08:28	14/05/2021 08:28	14/05/2021 08:28	14/05/2021 08:28	Darla Lincoln	DECORATING	EX	Darla Lincoln	0792767562

**Job Details (ID: 12588):**

- Agency: Test Agency
- External key: Use only primary selected values: No
- Appointment sequence: FIRST
- Task category: TASK
- Duration standard: 88
- Booking type: Housing Repair
- Priority: 9999
- Worker request: PLUMBING
- Assigned period: 28/05/2021 12:00 - 18:00
- Assigned worker: Kate B
- Final duration (minutes): 48
- Use worker efficiency: No
- Duration (minutes): 48
- Duration offset (minutes): 0
- Team: Occasional
- Address: 12588, PLUMBING
- Customer: Customer ID: 12588, Phone number: 0792767562, Template: 001, Customer Name: New Design
- Order: Order ID: 12588, Customer Name: New Design, Primary order num: 0004376, Target date: 28/05/2021 08:00, Order Name: NOT SET, A list of eight numbers at right side, Order comments: New Design, Priority: PRIORITY 1, Status: PLUMBING

## Edit

Select a single job from the data grid by checking the box to the left and then select Edit. To make amendments to the Job Detail, Time Constraints, Opening Hours and Worker Assignment.

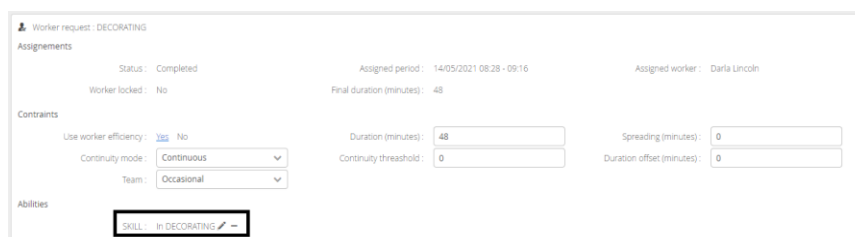


**Job Edit Form:**

- Status: Completed
- Worker: Darla Lincoln
- Time slot: 14/05/2021 08:28 - 13:00
- Assignment period: 14/05/2021 08:28 - 08:16
- Sector: EX
- Job ID: 12588
- Name: Today Monday
- Template: DECORATING
- Agency: Test Agency
- External key: Use only primary selected values: No
- User queue: Planner 3
- Appointment sequence: FIRST
- Original duration: 48
- Original user: admin
- Task category: TASK
- Duration standard: 88
- Booking type: Housing Repair
- Priority: 9999
- Worker request: DECORATING
- Assigned period: 14/05/2021 08:28 - 08:16
- Assigned worker: Darla Lincoln
- Final duration (minutes): 48
- Use worker efficiency: No
- Duration (minutes): 48
- Duration offset (minutes): 0
- Team: Occasional
- Address: 12588, DECORATING
- Customer: Customer ID: 12588, Phone number: 0792767562, Template: 001, Customer Name: New Design
- Order: Order ID: 12588, Customer Name: New Design, Primary order num: 0004376, Target date: 28/05/2021 08:00, Order Name: NOT SET, A list of eight numbers at right side, Order comments: New Design, Priority: PRIORITY 1, Status: PLUMBING

**NOTE:** Opening Hours are inherited from the Customer. Worker Assignment details are inherited from the Job Template.

To edit the required abilities, click on the pencil to make changes



**Worker request: DECORATING**

**Assignments:**

- Status: Completed
- Assigned period: 14/05/2021 08:28 - 09:16
- Assigned worker: Darla Lincoln
- Worker locked: No
- Final duration (minutes): 48

**Constraints:**

- Use worker efficiency: No
- Duration (minutes): 48
- Spreading (minutes): 0
- Continuity mode: Continuous
- Continuity threshold: 0
- Duration offset (minutes): 0
- Team: Occasional

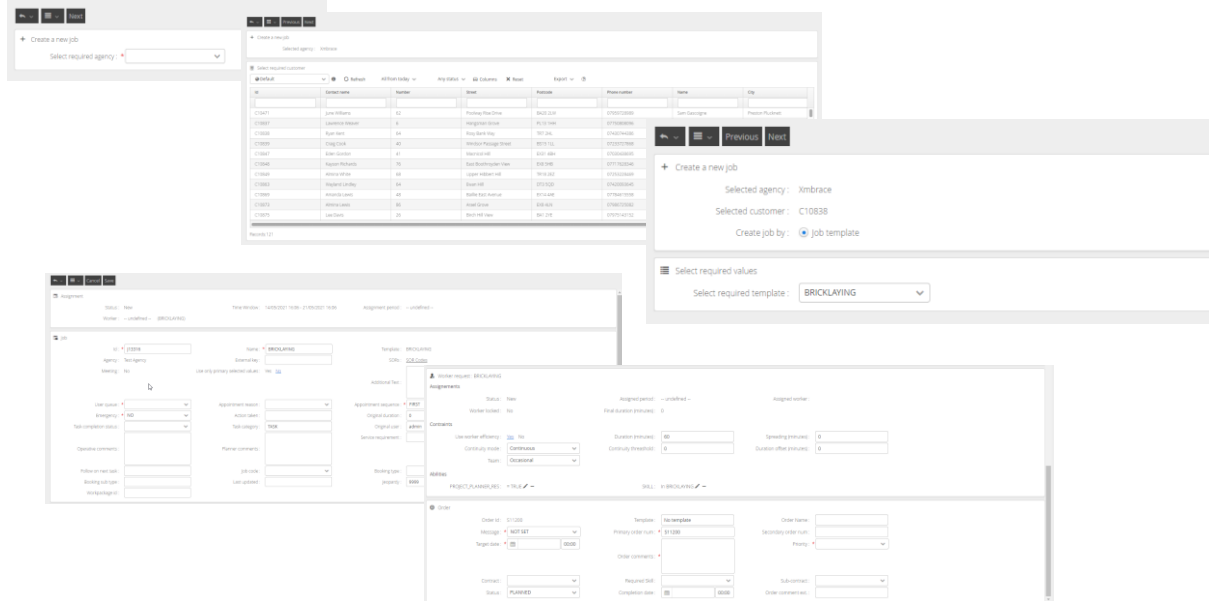
**Abilities:**

- SKILL: In DECORATING

## Add

To create a new Job, click Add and follow through the menus, completing the mandatory fields as required.

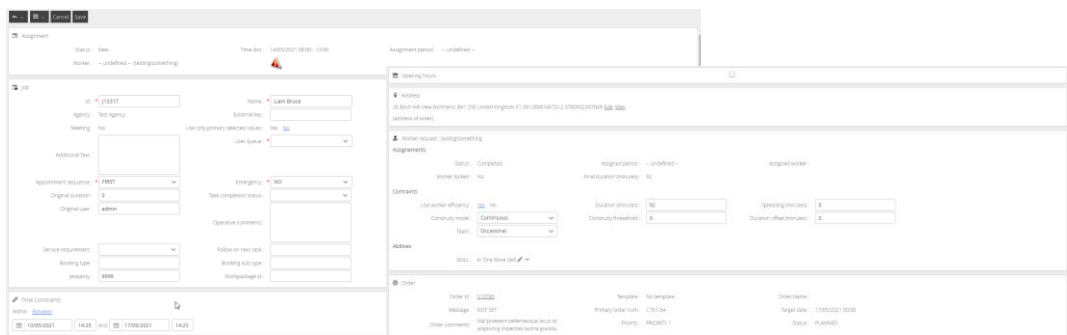
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Once complete, click Save and the Job will be added to the Jobs List with a status of New.

## Copy

Copying a job will result in the task being duplicated with a new J id.



Perform any required changes and click Save. This will create a new entry in your Jobs list.

## Delete

Delete will remove the selected Object. This function cannot be reversed.

## Sectors

Sectors are now displayed for the Job within the Job Details itself.


← ▢ Edit Change template Closest Diagnostic **Diary** Follow on Lock Manual assignment Possible workers SMS to the contact SMS to the worker Schedule now Send worker job **Show Scheduler** Suspend job Update comments

Update contact details Update job status Update order User Queue

---

Assignment

Status: Completed Time slot: 27/05/2021 08:00 - 13:00 Assignment period: 27/05/2021 08:13 - 08:40

Worker: Ruthel Adams (CARPENTRY)  **Reorder jobs**

## Change Template

Select a job from your Jobs List and click the Change Template button. From this menu, select the your new Target Template and click Save.

← ▢ Cancel Save Previous

---

Select required values

Select required template : **BRICKLAYING x 2** ▾

Once saved, the worker request will be changed to reflect the requirements of the new Template.

Worker request: BRICKLAYING (P1)

Assignments

Status: New Assigned period: 17/05/2021 08:05 - 09:27 Assigned worker: Tom Columbus

Worker locked: No Final duration (minutes): 82

Constraints

Use worker efficiency: Yes Duration (minutes): 82 Spreading (minutes): 0

Continuity mode: Continuous Continuity threshold: 0 Duration offset (minutes): 0

Team: Occasional

Abilities

SKILL: IN BRICKLAYING

---

Worker request: BRICKLAYING PAIR (K2)

Assignments

Status: New Assigned period: 17/05/2021 08:05 - 09:27 Assigned worker: Katie B

Worker locked: No Final duration (minutes): 82

Constraints

Use worker efficiency: Yes Duration (minutes): 82 Spreading (minutes): 0

Continuity mode: Continuous Continuity threshold: 0 Duration offset (minutes): 0

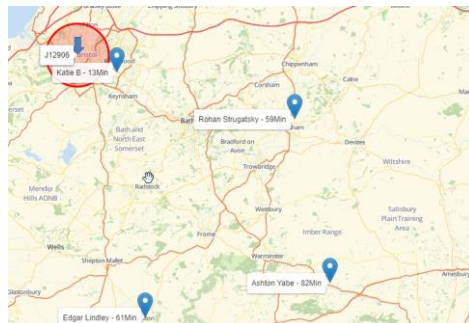
Team: Occasional

Abilities

SKILL: IN BRICKLAYING

## Closest

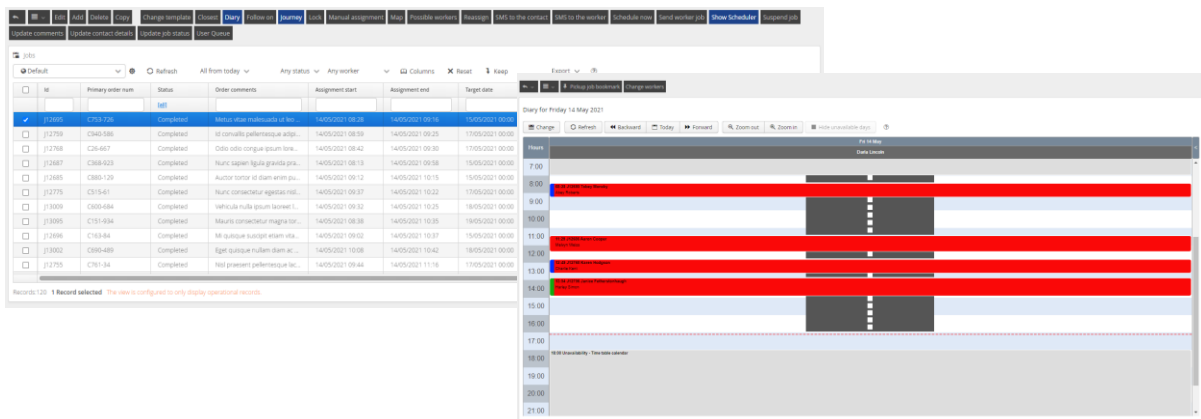
If you are a DRS Maps customer, clicking Closest will show you on the map the job and the operatives relative to the job. The Job and relative area will show as a blue arrow with a red ring. All possible workers will be shown on the map with markers based on your configuration.



More details on Maps can be found in the MAPS section of these release notes.

## Diary

Selecting a number of jobs from the Jobs list and clicking the Diary button will display those jobs on the Resource Diary.



The screenshot shows the 'Diary' button highlighted in the top navigation bar. Below it, a table lists various jobs with columns for ID, Primary order ref, Status, Order comments, Assignment start, Assignment end, and Target date. To the right, a detailed view of a job's schedule is shown, displaying a timeline from 7:00 to 21:00 with red bars indicating assigned resources.

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More detail on the Resource Diary can be found in the Diaries section of these release notes.

## Follow On

Follow Ons are created by selecting a valid job from the Jobs list and clicking the Follow On button.

Complete the required fields here and click Create. Additional fields can be added to this window as required from within the Configuration tab.

Create follow on

Cancel

Create

Job template :

test template

Duration (minutes) :

92

Begin time constraint :

14/05/2021 17:07

End time constraint :

17/05/2021 00:00

Target date :

17/05/2021 00:00

Worker(s) lock

Worker request

testingsomething

Worker lock

Yes

Worker

No

Ashton Yabe

The selected workers are taken from the parent job. Set worker lock to no if not required for the follow on job

Business data

Additional Text :

Appointment sequence :

FOLLOW ON

Emergency :

NO

## Journey

Selecting a number of Jobs from the Jobs View and clicking Journey will show the predicted route taken by the Resource(s) to deliver the tasks. Where multiple resources are identified, these will be colour coded.



## Lock

Selecting a number of Jobs from the Jobs List and clicking the Lock button will display pop up window.

Lock job + X

**Job**

Id: J12695      Name: Tobey Moncky

Time lock: Yes [No](#)      On period assignment: 14/05/2021 08:28 - 09:16

Worker request: DECORATING      Worker: Darla Lincoln      Worker locked: Yes [No](#)

Clicking Yes or No for Time or Worker Lock will set the required values. Once selected, click Save to commit.

## Manual Assignment

Selecting a single job and clicking the Manual Assignment button will allow the user to schedule a task outside of the configured scheduling rules.

Manual assignment + X

**Job main information**

Initial time window: 09/05/2021 23:00 - 15/05/2021 23:00      Assignment period: 14/05/2021 08:28 - 09:16

**Booking details**

Appointment reason: ▼

**Job current time window settings**

[Set job slot manually](#)    [Set job slot from slot hours configuration](#)    [Update current time window](#)

Time window from: 14/05/2021 08:00 To: 14/05/2021 13:00

**Job assignments settings**

Status: Completed ▼

Assignment from: 14/05/2021 08:28 To: 14/05/2021 09:16

Time lock: Yes [No](#)


Worker request	Duration	Assigned to	Lock while assigning	Currently locked
DECORATING	48 (100%)	Darla Lincoln (0/100%)	Yes <a href="#">No</a>	no one

If the scheduling fails, immediately force without asking: [Yes](#) [No](#)

**Help area**

If no modification, Schedule now button will schedule the job with the system choices. If there are locked items, the job will be planned taking into account those locked items.

The time window settings can be changed by selecting the available options; Set job Slot Manually, Set job slot from slot hours configuration or Update Current Time Window.


 Job current time window settings

[Set job slot manually](#)
[Set job slot from slot hours configuration](#)
[Update current time window](#)

Time window from from:
 

 To

---






 Job assignments settings

Status :

Assignment from from:
 

 To

Time lock : Yes [No](#)

 worker request	 Duration	 Assigned to	 Lock while assigning	 Currently locked
DECORATING	48 (100%)	Darla Lincoln (W1006)	Yes <a href="#">No</a>	-- no one --


If the scheduling fails, immediately force without asking : [Yes](#) [No](#)

Job current time window settings





Set job slot manually Set job slot from slot hours configuration Update current time window

Time window from : 14/05/2021 08:00 To 14/05/2021 13:00






Clicking on the Operative Name will allow you to set the required operative from the available list. You can also set the appointment time and/or worker lock.

 Job assignments settings

Status : Completed

Assignment from :  14/05/2021  08:28 To  14/05/2021  09:16

Time lock : Yes [No](#)

 worker request	 Duration	 Assigned to	 Lock while assigning	 Currently locked
DECORATING	48 (100%)	<a href="#">Daria Lincoln (W1006)</a>	Yes <a href="#">No</a>	-- no one --

If the scheduling fails, immediately force without asking : [Yes](#) No

Worker picker

Cancel

Workers							
Default		Refresh	Matching workers	Columns	Reset	Export	
ID	Name	Trade	Reporting group	Mobile phone			
W1000	Tom Columbus	REPAIRS		07872273324			
W1002	Ashton Yabe	REPAIRS		07245812295			
W1003	Ruthel Adams	REPAIRS		07514621367			
W1004	Rohan Strugatsky	REPAIRS		07424656458			
W1005	Fiona Newton	REPAIRS		07326796106			
W1006	Darla Lincoln	REPAIRS		07285231771			
W1007	Alexus Scott	REPAIRS		07334356528			
W1008	Brittany White	REPAIRS		07475956552			
W1011	Darren Safe	REPAIRS		07774523698			
W1016	Workrank	REPAIRS		07475956552			
W1027	Katie B	REPAIRS		07872273324			

Records:11

## Possible Workers

Checking a single job from the Jobs List and selecting Possible Workers will display all workers who have the required abilities and sectors to deliver the Job.

Possible workers + ×

Cancel Diary Quotas

Job

Status: Completed Is primary sector only: No  
Forced/in violation: Yes Assigned worker(s): Darla Lincoln

Workers

Worker 1 - Darla Lincoln

Refresh Columns Reset Keep Export

<input type="checkbox"/>	Is possible	Id	Name	Home distance	Sector match	Has req
<input checked="" type="checkbox"/>	Yes				[all]	[all]
<input type="checkbox"/>	Yes	W1000	Tom Columbus	113.527	Primary	Yes
<input type="checkbox"/>	Yes	W1001	Anny Gatling	94.849	Primary	Yes
<input type="checkbox"/>	Yes	W1002	Ashton Yabe	171.23	Primary	Yes
<input type="checkbox"/>	Yes	W1003	Ruthel Adams	81.427	Primary	Yes
<input type="checkbox"/>	Yes	W1004	Rohan Strugatsky	159.925	Primary	Yes
<input type="checkbox"/>	Yes	W1005	Fiona Newton	81.196	Primary	Yes
<input type="checkbox"/>	Yes	W1006	Darla Lincoln	9.911	Primary	Yes
<input type="checkbox"/>	Yes	W1007	Alexus Scott	142.303	Primary	Yes
<input type="checkbox"/>	Yes	W1008	Brittany White	65.968	Primary	Yes
<input type="checkbox"/>	Yes	W1009	Edgar Lindley	130.175	Primary	Yes
<input type="checkbox"/>	Yes	W1011	Darren Safe	185.624	Primary	Yes

Records:15

Checking some of the listed workers and selecting Quotas will show the amount of effort and available time currently allocated to the selected workers.

Quotas + ×

Cancel

Quotas

Quotas for the: 14/05/2021

Anny Gatling

Jobs: 0 Work time: Travel time: Available time: Non working day

Ashton Yabe

Jobs: 5 Work time: 04:54 / 09:00 (54%) Travel time: 03:52 / 09:00 (43%) Available time: 00:14 / 09:00 (3%)

Ruthel Adams

Jobs: 4 Work time: 03:32 / 09:00 (39%) Travel time: 06:16 / 09:00 (70%) Available time: 00:00 / 09:00 (0%)

Tom Columbus

Jobs: 3 Work time: 03:52 / 09:00 (43%) Travel time: 04:07 / 09:00 (46%) Available time: 01:01 / 09:00 (11%)

## Reassign

Check one or a number of jobs from your Jobs view and click Reassign.

**NOTE:** The selected Jobs must be assigned to a single operative.

Reassign job + x

Cancel Choose this worker

Reassign jobs



Use time window : ☐

Ignore required abilities : ☐

Ignore sectors : ☐

Possible workers

Selected worker

Darren Safe (W1011)  

**Use time window:** Checking this box will result in the task being scheduled within the existing time window.

**Ignore required abilities:** Checking this box will result in the Worker list including people who do not match the ability requirement of the task.

**Ignore Sectors:** Checking this box will result in the Worker list including people who are not assigned the required Sector.

Reassign jobs

Use time window : ☐

Ignore required abilities : ☐

Ignore sectors : ☐

Selecting  will allow you to select a different worker if required.

Possible workers

Selected worker

Darren Safe (W1011)  

Worker picker + x

Cancel

Workers

Default

Refresh

Matching workers

Columns

Reset

Export

Id	Name	Trade	Reporting group	Mobile phone
W1002	Ashton Yabe	REPAIRS		07245812295
W1007	Alexus Scott	REPAIRS		07334356528
W1011	Darren Safe	REPAIRS		07774523698

Records:3



Once done, click **Choose this worker**.

**Cancel** **Choose another worker** **Reassign** **Simulate**

Reassign job to worker W1007 - Alexis Scott

Reschedule jobs: ☐

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**Reschedule Jobs:** Will result in the Scheduling Mode modal box appearing for selections to be made.

Scheduling mode

Preservation mode

No preservation

Scheduling window

Keep time windows

Between

20/05/2021

00:00

And

21/05/2021

00:00

Initial time windows

Once the appropriate selections are made, click:

**Simulate:** to see the results without committing the schedule.

**Reassign:** Commit the schedule changes.

## Schedule Now

Schedule now will still result in a floating appointment being created. To change the time windows, select Change the Current Time Windows Of Jobs first.

Jobs scheduling

+ x

**Cancel**

**Schedule now**

Jobs scheduling

Scheduling mode

No preservation

Keep the current time window of jobs

Change the current time window of jobs

20/05/2021

00:00

To

21/05/2021

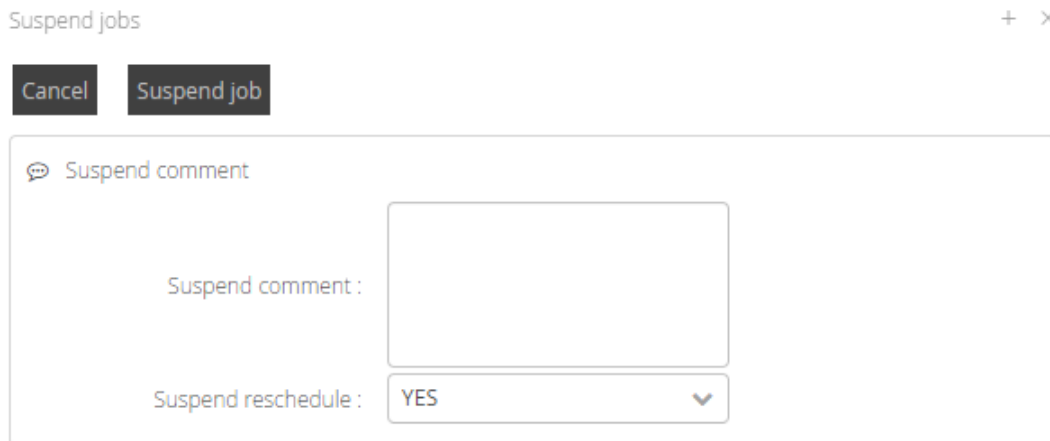
00:00

## Show Scheduler

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

## Suspend Job

Page | 42 Selecting a single job from the Jobs menu and clicking Suspend Job will result in this window being displayed.



Suspend jobs

Cancel Suspend job

Suspend comment

Suspend comment :

Suspend reschedule : YES

Add your comment and select Suspend Job.

## Update Comments

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

## Update Contact Details

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

## Update Job Status

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

## User Queue

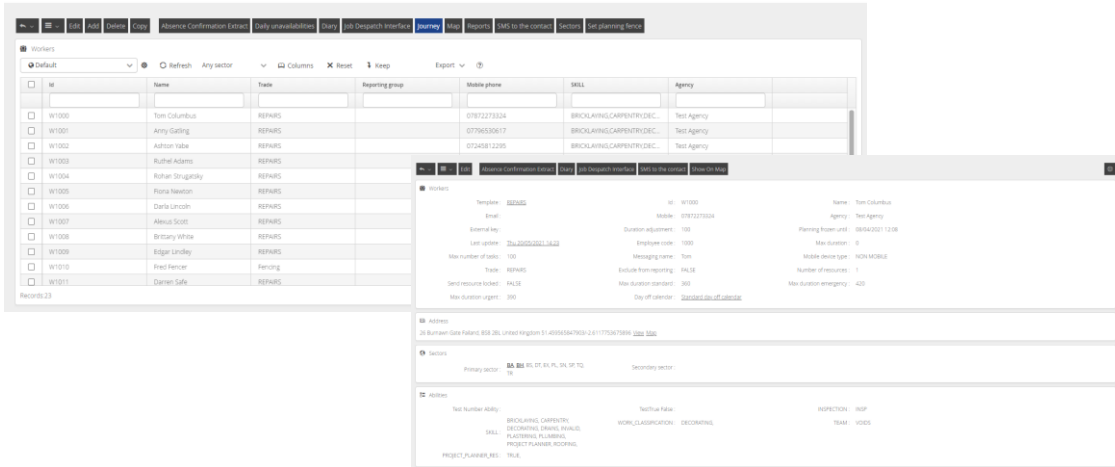
No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

---

## Workers

The Workers detail panel has been redesigned. Click on a single item within the detail panel to review the object configuration.

Workers



## Add

Adding a worker can be done by selecting Add. Select your Agency.

+ Create a new worker

Agency:

Then the Worker Template Type


+ Create a new worker

Agency:

Template:

Following this the steps are as described within the Edit function.

## Edit

Clicking the  button on either the Worker or Worker Details screen to edit the schedulable details on the workers.

Workers

Template: REPAIRS

Mobile: 07872273324

Planning frozen until: 08/04/2021 12:08

Max number of tasks: 100

Trade: REPAIRS

Send resource locked: FALSE

Max duration emergency: 420

Id: W1000

Agency: Test Agency

Last update: Thu 20/05/2021 14:22

Messaging name: Tom

Exclude from reporting: FALSE

Lunchbreak: FALSE

Max duration urgent: 390

Name: Tom Columbus

External key:

Employee code: 1000

Mobile device type: NON MOBILE

Number of resources: 1

Min hours for lunchbreak:

Day off calendar: Standard day off calendar

Email:

Duration adjustment: 100

Max duration: 0

Mobile phone type:

Reporting group:

Max duration standard: 360

Worker Details can be edited in the Worker field. This includes all details which would have been listed under **PROPERTIES** in previous versions.

Address

26 Burnswain Gate Folland, B58 2BL, United Kingdom 51.459565847903/-2.6117753675896 [Edit Map](#)

Where an address has already been selected, updating the address can be done by clicking EDIT.

Address

Cancel Validate

Address

Address line 1:

Address line 2:

Address line 3:

Address line 4:

Street number:

Street:

Postcode:

City:



City Complement:

Country:



Coordinates: 51.459566 / -2.611775



Once you have updated the Address, you must click VALIDATE.

## Editing Sectors

Updating sectors is done by clicking on the EDIT (  ) icon. Variabilities are set by selecting the Calendar (  ) icon. Any Sector which already has a variability applied will be shown in **BOLD and UNDERLINED**.

Sectors

Primary sector: **BA BH**, BS, DT, EX, PL, SN, SP, TQ, TR  

Secondary sector:  

Sectors selection



Cancel Save

AB  
AL  
B  
BB  
BD  
BL  
BN  
BR  
CA  
CR


BA  
BH  
BS  
DT  
EX  
PL  
SN  
SP  
TQ  
TR


Move the appropriate sectors to the right hand side of the menu and click SAVE.



## Editing Abilities



Adding an ability where no value exists can be done by clicking the  icon. Once an ability contains an entry, that entry can be edited with the  icon.



Abilities



Test Number Ability: 


Test True False: 

INSPECTION: INSP  

WORK\_CLASSIFICATION: DECORATING  

TEAM: VOIDS  

PROJECT\_PLANNER\_RES: TRUE  

BRICKLAYING, CARPENTRY, DECORATING, DRAINS, INVALID, SKILL, PLASTERING, PLUMBING, PROJECT PLANNER, ROOFING 

In both cases, the following window will be displayed.

Abilities

Cancel Save


Ability

Name  
SKILL


Values

One More Skill  
another test

BRICKLAYING  
CARPENTRY  
DECORATING  
DRAINS  
INVALID  
PLASTERING  
PLUMBING  
PROJECT PLANNER  
ROOFING

Set the appropriate values, based on your ability type. Click Save once your changes are complete. Clear all existing selections by clicking the  icon.

## Setting Variabilities

Clicking on the Calendar () icon will result in the Variability Editor being displayed.

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Variability editor + >

Cancel Copy Paste Save

Variables

Refresh Columns Reset Keep Export ?

<input type="checkbox"/>	Name	Variabilities count	Start date of variabilities	End date of variabilities
<input type="checkbox"/>				
<input type="checkbox"/>	BA	1	06/05/2021	06/05/2021
<input type="checkbox"/>	BH	1	06/05/2021	06/05/2021
<input type="checkbox"/>	BS	0		
<input type="checkbox"/>	DT	0		
<input type="checkbox"/>	EX	0		
<input type="checkbox"/>	PL	0		
<input type="checkbox"/>	SN	0		
<input type="checkbox"/>	SP	0		
<input type="checkbox"/>	TQ	0		
<input type="checkbox"/>	TR	0		

Any entries with Variabilities already configured will be displayed with the next (or last) variability date being shown. The Variability count displays how many variabilities are configured against that option.

COPY will allow you to PASTE the same time windows onto one (or many) other entries.

Clicking on any entry with no current Variability will display this screen. Click ADD VARIABILITY PERIOD to add a variability.

Manage variabilities + x



Cancel Save Delete all

Add validity period



Click the Blue + icon to add another date period. Click the Pencil to specify days and time within the Validity Period for availability.

Manage variabilities + x

Cancel Save Delete all

From  20/05/2021 To  20/05/2021 + -

MONDAY	08:00	17:00	+ -
TUESDAY	08:00	17:00	+ -
WEDNESDAY	08:00	17:00	+ -
THURSDAY	08:00	17:00	+ -
FRIDAY	08:00	17:00	+ -
SATURDAY	08:00	17:00	+ -
SUNDAY	08:00	17:00	+ -

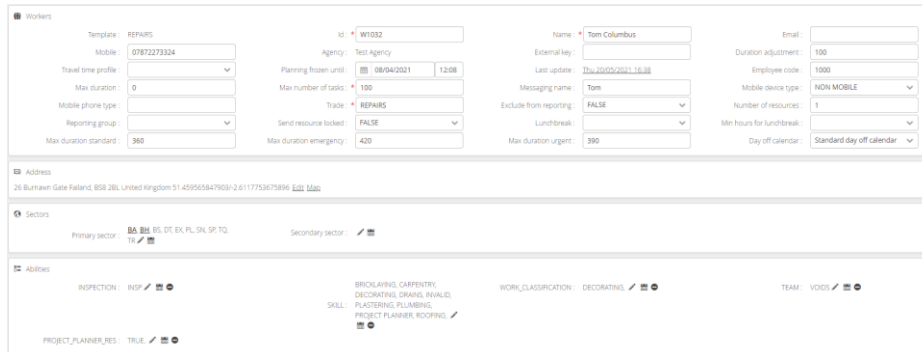
From  21/05/2021 To  21/05/2021 + -

Once done, click SAVE and SAVE again.

## Copy

Copy will make a direct copy of the object you had selected. Some of your fields will be pre-populated due to the copy.

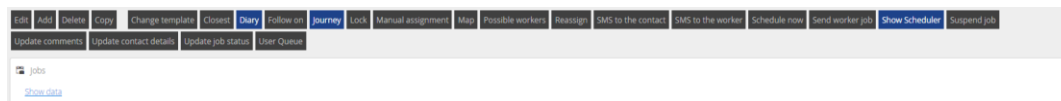
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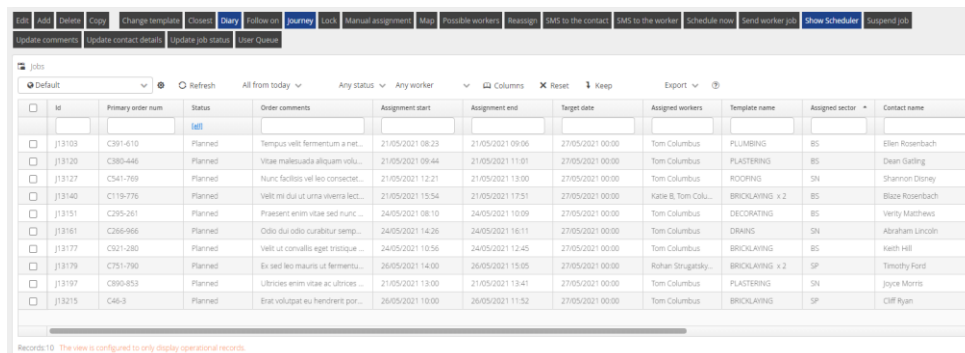
## Delete

Delete will remove the selected Object. This function cannot be reversed.

## Job List



Clicking the Show Data link will display the jobs assigned to this operative.

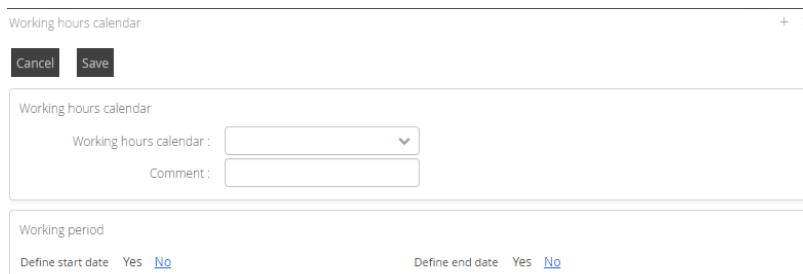


Job ID	Primary order num	Status	Order comments	Assignment start	Assignment end	Target date	Assigned workers	Template name	Assigned sector	Contact name
J13109	C391-610	Planned	Tempus velit fermentum a net...	21/05/2021 08:23	21/05/2021 09:06	27/05/2021 00:00	Tom Columbus	PLUMBING	BS	Ellen Rosenbach
J13120	C380-446	Planned	Vitae malesuada aliquam volu...	21/05/2021 09:44	21/05/2021 11:01	27/05/2021 00:00	Tom Columbus	PLASTERING	BS	Dean Gelling
J13127	C541-769	Planned	Nunc facilisis vel leo consectet...	21/05/2021 12:21	21/05/2021 13:00	27/05/2021 00:00	Tom Columbus	ROOFING	SN	Shannon Disney
J13140	C119-776	Planned	Velit mi dui ut urna viverra lect...	21/05/2021 15:54	21/05/2021 17:51	27/05/2021 00:00	Katie B. Tom Colu...	BRICKLAYING x 2	BS	Blaze Rosenbach
J13151	C295-261	Planned	Praesent enim vitae sed nunc...	24/05/2021 08:10	24/05/2021 10:09	27/05/2021 00:00	Tom Columbus	DECORATING	BS	Verity Matthews
J13161	C266-666	Planned	Odio dui odio curabitur semp...	24/05/2021 14:26	24/05/2021 16:11	27/05/2021 00:00	Tom Columbus	DRAINS	SN	Abraham Lincoln
J13177	C321-280	Planned	Velit ut convallis eget tristique...	24/05/2021 10:56	24/05/2021 12:45	27/05/2021 00:00	Tom Columbus	BRICKLAYING	BS	Keith Hill
J13179	C751-790	Planned	Ex sed leo mauris ut fermentum...	26/05/2021 14:00	26/05/2021 15:05	27/05/2021 00:00	Rohan Strugate...	BRICKLAYING x 2	SP	Timothy Ford
J13197	C890-653	Planned	Ultricies enim vitae ac ultrices...	21/05/2021 13:00	21/05/2021 13:41	27/05/2021 00:00	Tom Columbus	PLASTERING	SN	Jayne Morris
J13215	C46-3	Planned	Erat volutpat eu hendrerit por...	26/05/2021 10:00	26/05/2021 11:52	27/05/2021 00:00	Tom Columbus	BRICKLAYING	SP	Cliff Ryan

## Working Hours Calendar

### Add a Calendar

Add a New calendar by clicking the ADD button.



Once you have selected your calendar, the details will be displayed.

Working hours calendar + x

**Cancel** **Save**

Working hours calendar

Working hours calendar : Working hours calendar ▼

Comment :

Working period

Define start date Yes No Define end date Yes No

Working hours calendar

**Mon:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Tue:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Wed:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Thu:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Fri:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00

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Set the time windows for the calendar by setting the DEFINE START DATE or DEFINE END DATE to YES

Working period

Define start date Yes No Define end date Yes No

Start date  Included end

## Edit a Calendar

The assigned Working Hours Calendar will be shown within this box.

Start	End	Working hours calendar name	Comment	Working hours calendar id
		Working hours calendar	CAL_STANDARD	CAL_STANDARD

Clicking on the configured calendar will show the associated details. If you are in Edit mode on the worker, you can also Edit the Configured calendar. Otherwise, check the associated box and click Edit.

Working hours calendar + x

**Cancel** **Save**

Working hours calendar

Working hours calendar : Working hours calendar ▼

Comment : CAL\_STANDARD

Working period

Define start date Yes No Define end date Yes No

Working hours calendar

**Mon:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Tue:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Wed:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Thu:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00  
**Fri:** 08:00-18:00 **Lunch:** 60.0 Minutes Within 12:00-14:00

Change the required details and click Save.

## Unavailabilities

Add an Unavailability by clicking **Add** and completing the required values.

Edit
Add
Delete

Unavailabilities

Refresh
Columns
Reset
Keep
Export

	From	To	Reason	Comment
<input type="checkbox"/>				
<input type="checkbox"/>	08/10/2020 00:00	09/10/2020 00:00		
<input type="checkbox"/>	16/10/2020 00:00	17/10/2020 00:00	Holiday	
<input type="checkbox"/>	01/12/2020 00:00	02/12/2020 00:00	Assigned To Voids	
<input type="checkbox"/>	21/11/2020 00:00	22/11/2020 00:00	Vehicle Maintenance	
<input type="checkbox"/>	22/11/2020 00:00	23/11/2020 00:00	Special Duties	

Unavailability

Cancel
Save

Unavailability

Start date : 20/05/2021 00:00

End date : 27/05/2021 00:00

Unavailability reason :

Comments :

Use **Edit** or **Delete** to modify or remove an existing Unavailability.

## Other Functions

### Daily Unavailabilities

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

### Diary

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

### Journey

Selecting a number of workers and selecting JOURNEY will result in the Journey of the selected workers being shown on a map. You can select the time window for the Journeys to be displayed for.

Choose date

Cancel
Yesterday
Today
Tomorrow
Selected date

Display for the

Display date : 20/05/2021



The workers will be colour coded when multiple workers are selected.

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Reports

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

Sectors

Sectors will show you the configured sector map for your solution.

Sectors + x

Cancel

Sectors

Postcode per sector ▾ Refresh Columns X Reset Export ▾ ?

Sector	Postcode	Latitude	Longitude
AB	AB	57.288...	-2.3180...
AL	AL	51.776...	-0.2857...
B	B	52.462...	-1.8885...
BA	BA	51.221...	-2.4204...
BB	BB	53.784...	-2.3351...
BD	BD	53.831...	-1.8358...
BH	BH	50.750...	-1.8915...
BL	BL	53.587...	-2.4084...
BN	BN	50.829...	-0.1142...
BR	BR	51.393...	0.0468...
BS	BS	51.445...	-2.6314...
CA	CA	54.720...	-3.1072...

Records:120

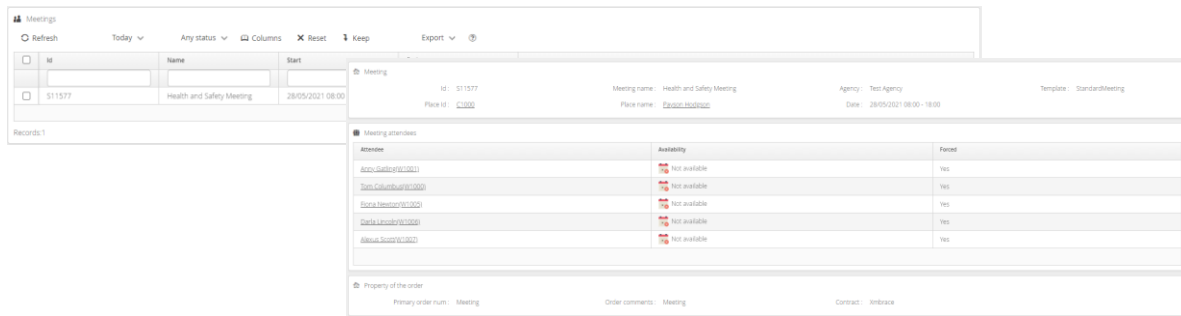
### Set Planning Fence

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

## Meeting

The Meetings window has been redesigned. Clicking on a single object will display the detail of the Meeting.

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The screenshot shows the 'Meetings' window. On the left, there's a table with columns: Id, Name, Start. It lists one meeting: Id: 511577, Name: Health and Safety Meeting, Start: 28/05/2021 08:00. On the right, there's a detailed view of the selected meeting. It shows: Id: 511577, Meeting name: Health and Safety Meeting, Agency: Test Agency, Template: StandardMeeting, Place Id: C1000, Date: 28/05/2021 08:00 - 18:00. Below this, there's a table for 'Meeting attendees' with columns: Attendee, Availability, Forced. It lists five attendees, all with 'Not available' status and 'Yes' in the 'Forced' column. At the bottom, there's a section for 'Property of the order' with fields for Primary order num, Order comments, and Contract.

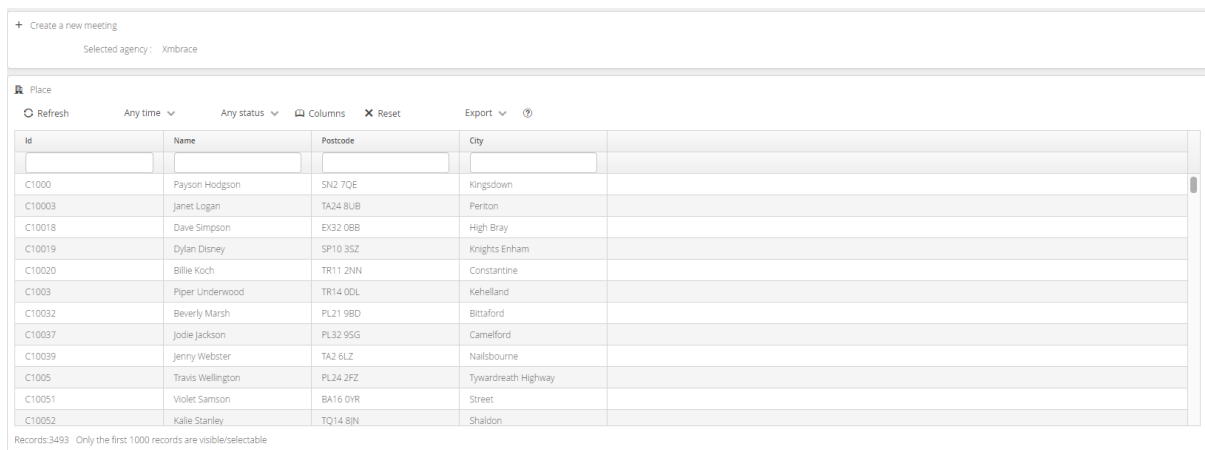
## Add

Create a new Meeting by clicking Add. Select your Agency from the dropdown.



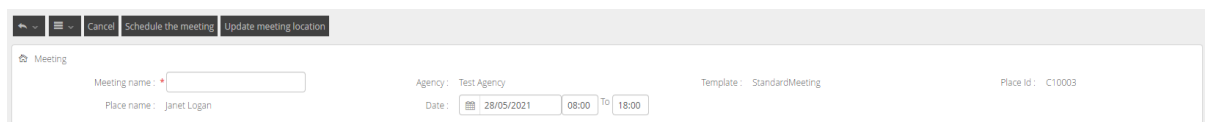
The screenshot shows a button labeled '+ Create a new meeting' and a dropdown menu labeled 'Select required agency:' with a downward arrow.

Select your Meeting property.



The screenshot shows the 'Place' window. At the top, there's a button '+ Create a new meeting' and a dropdown 'Selected agency: Xmbrace'. Below, there's a table with columns: Id, Name, Postcode, City. It lists 15 places. At the bottom, it says 'Records 3493. Only the first 1000 records are visible/selectable'.

Set the Meeting Name and Time Window.



The screenshot shows the 'Meeting' detail window. It has fields for: Meeting name (with a dropdown), Agency (Test Agency), Template (StandardMeeting), Place Id (C10003), Place name (Janet Logan), Date (28/05/2021), and Time (08:00 to 18:00). At the top, there are buttons: Cancel, Schedule the meeting, and Update meeting location.

Select your required Workers by clicking Add Attendees.



The screenshot shows the 'Meeting attendees' window. It has buttons: Add attendees, Check availability, and Update attendees diary. Below, there's a table with columns: Attendee, Availability, and Forced.

Select your workers by checking the box to the left and selecting Select.

Worker picker + x

Cancel Select

Workers

Default
 Refresh
 Columns
 Reset
 Keep
 Export
 ?

<input type="checkbox"/>	Id	Name	Trade	Reporting group	Mobile phone
<input type="checkbox"/>					
<input type="checkbox"/>	W1000	Tom Columbus	REPAIRS		0787227332
<input type="checkbox"/>	W1001	Anny Gatling	REPAIRS		0779653061
<input type="checkbox"/>	W1002	Ashton Yabe	REPAIRS		0724581229
<input type="checkbox"/>	W1003	Ruthel Adams	REPAIRS		0751462136
<input type="checkbox"/>	W1004	Rohan Strugatsky	REPAIRS		0742465645
<input type="checkbox"/>	W1005	Fiona Newton	REPAIRS		0732679610
<input type="checkbox"/>	W1006	Darla Lincoln	REPAIRS		0728523177
<input type="checkbox"/>	W1007	Alexus Scott	REPAIRS		0733435652
<input type="checkbox"/>	W1008	Brittany White	REPAIRS		0747595655
<input type="checkbox"/>	W1009	Edgar Lindley	REPAIRS		0708531297
<input type="checkbox"/>	W1010	Fred Fencer	Fencing		0794653191

Records:22

Check the attendees Availability by clicking the Check availability button. If availability is not available, appointments can be Forced by setting Forced to YES.

Meeting attendees

Add attendees Check availability Update attendees diary

Attendee	Availability	Forced
Anny Gatling(W1001)	Unknown	Yes <a href="#">No</a>
Tom Columbus(W1000)	Unknown	Yes <a href="#">No</a>
Ashton Yabe(W1002)	Unknown	Yes <a href="#">No</a>
Ruthel Adams(W1003)	Unknown	Yes <a href="#">No</a>
Rohan Strugatsky(W1004)	Unknown	Yes <a href="#">No</a>
Edgar Lindley(W1009)	Unknown	Yes <a href="#">No</a>
Fred Fencer(W1010)	Unknown	Yes <a href="#">No</a>

Remove an attendee by clicking on the icon. Complete the rest of the required fields and click Schedule the meeting.

## Copy

Copying a meeting will display a pre-populated meeting instance. Complete your changes and click Schedule the meeting.











## Edit

Edit will allow you to make changes to a pre-existing meeting.

Meeting

Id : 511577
Meeting name : \* Health and Safety Meeting
Agency : Test Agency
Template : StandardMeeting
Place Id : C1000
Place name : Payson Hodgson
Date : 28/05/2021 08:00 To 18:00

Meeting attendees
Add attendees Check availability Update attendees diary

Attendee	Availability	Forced
 Amy Gatling(W1001)	 Not available	<a href="#">Yes</a> No
 Tom Columbus(W1000)	 Not available	<a href="#">Yes</a> No
 Fiona Newbery(W1005)	 Not available	<a href="#">Yes</a> No
 David Lincoln(W1006)	 Not available	<a href="#">Yes</a> No
 Alexus Scott(W1007)	 Not available	<a href="#">Yes</a> No

Property of the order
Primary order num : \* Meeting
Order comments : \* Meeting
Contract : \* Xmbrace
Required Skill :

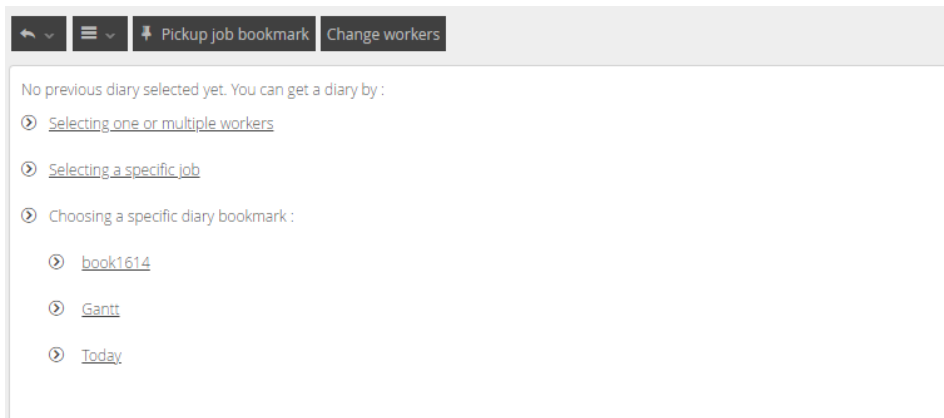
Once complete, ensure you click Schedule the Meeting if the scheduling details have changed.

## Delete

Delete will remove the selected Object. This function cannot be reversed.

## Diaries

With no previous diary selected, you will be presented with this screen.

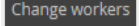


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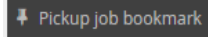
Following the links will take you to the Workers or Job Screen, or one of your pre-selected bookmarks.

When a diary is displayed, general functions are as per 5.7. Please review the 5.7 User Guide for use. Appendix 1.

### Change Workers

The Change Workers  button will allow you to add, remove or change the workers that are currently displayed on the diary. You can also use this button to amend the column order on display.

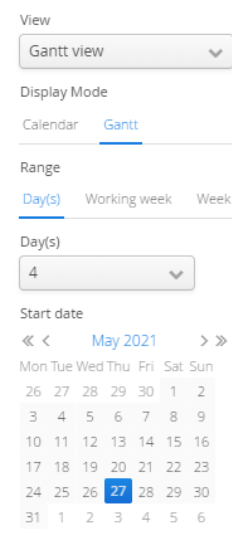
### Pickup Job Bookmark

The Pickup Job Bookmark  button will allow you to schedule tasks from within your bookmark list.

### Gantt

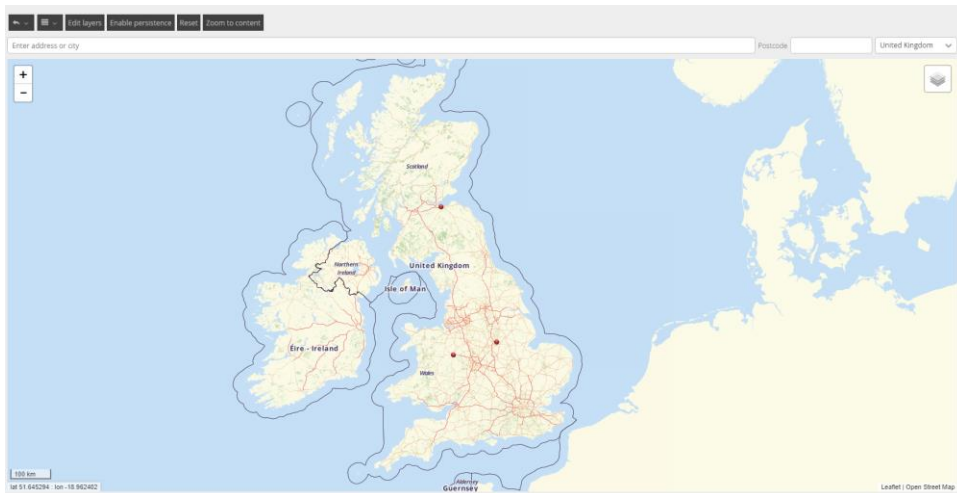
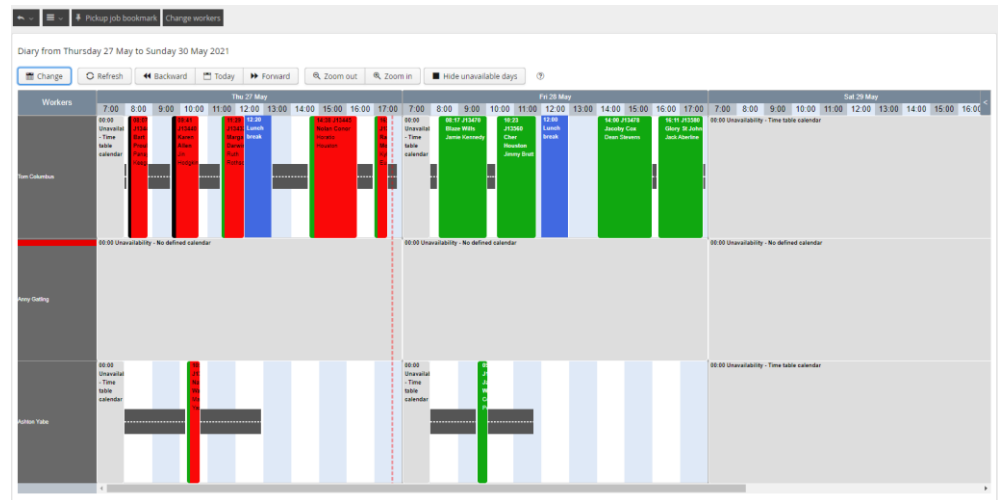
Diaries are now available to view in Gantt view. Special Gantt Diary Configurations can be configured in your Diary Templates.

All viewed Diaries can be changed to Gantt style from within the Change menu by selecting Gantt.



## Map

Clicking the Map option in the Left Menu will display the Map. Any Permanent Markers configured within the Configuration tab will be displayed.



## Enable Persistence

On the Map Feature throughout DRS 6.0, the Enable Persistence function can be seen. Clicking this button will result in DRS 6.0 remembering your selected Pins of each given object type currently on display.

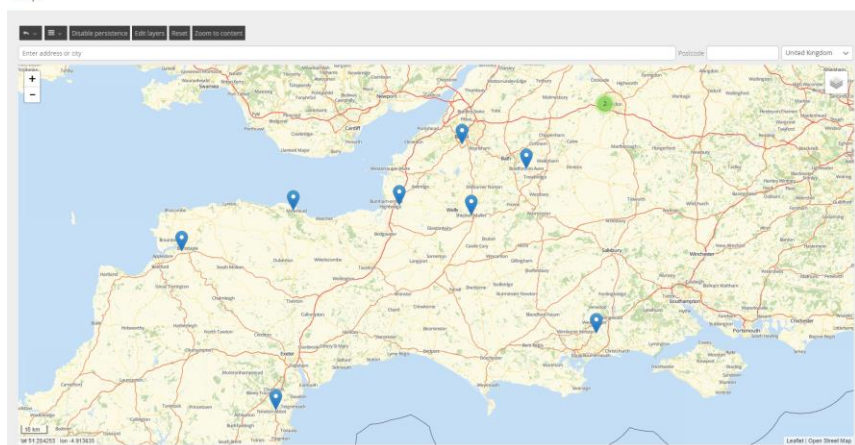
Accessing the Map Function from another Object Type will result in your Pins from the previous session of Maps also available on display.

## Reset

Using the Reset button will set your Map back to default. It will remove any persistent map icons and custom icon configuration.

## Using Maps from the Object Screens

Customers

Map



## Edit Layers

The different icon colours can be changed to identify the objects on the map. If you have set persistence, you can set different values for each layer type.

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From the map screen, click Edit Layers.

Edit layers

Cancel Edit Delete Apply

Layouts

Refresh Columns Reset Keep Export ?

<input type="checkbox"/>	Name	Clustered	Items
<input type="checkbox"/>		[all]	
<input type="checkbox"/>	Customers C1000,C10000,C10...	Yes	11
<input type="checkbox"/>	Jobs J11601,J12080,J12150,J12...	Yes	12

Records:2

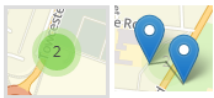
Select the layer you want to change and click Edit.


Edit layer Customers C1000,C10000,C10001,C10002,C10003,C10004,C10005,C10006,C10007,C10008,C10009

Cancel Save

+ Layout parameters

View name: Customers C1000,C10000,C100

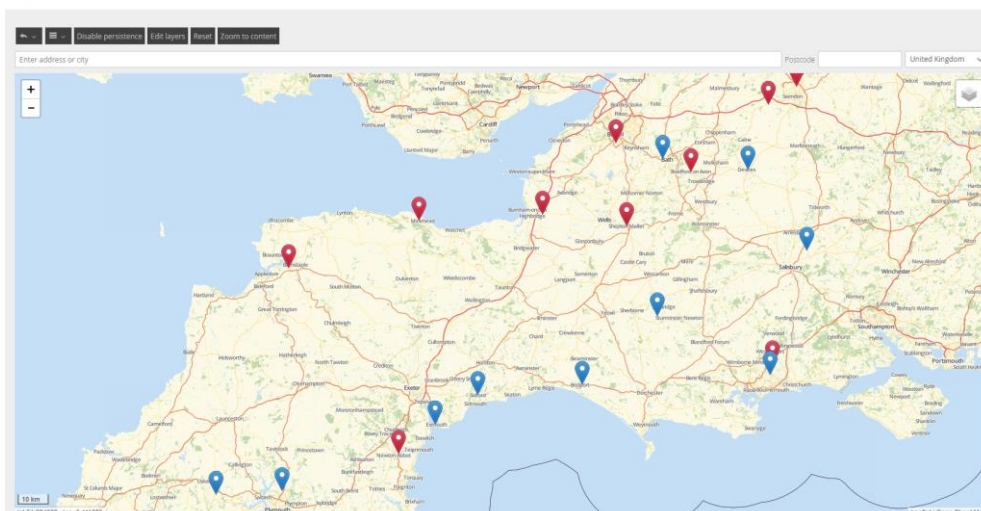




Use status for jobs colour: Yes No

From here, you can select your Pin type and colour and then click Save and then click Apply. This will update your Map to display your changes.

Map





## History

The History tab is now available within it's own menu option in the Left Menu. Access to this can be controlled through the Profiles option within the Configuration Menu.

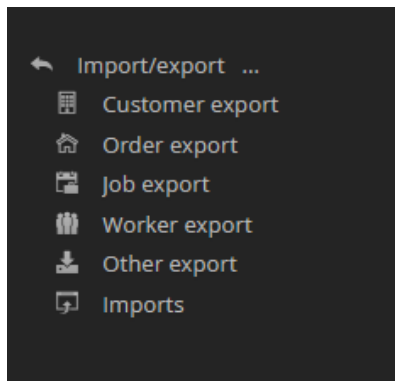
Page | 59 No further changes in V6. Please refer to the 5.7 User Guide. Appendix 1.

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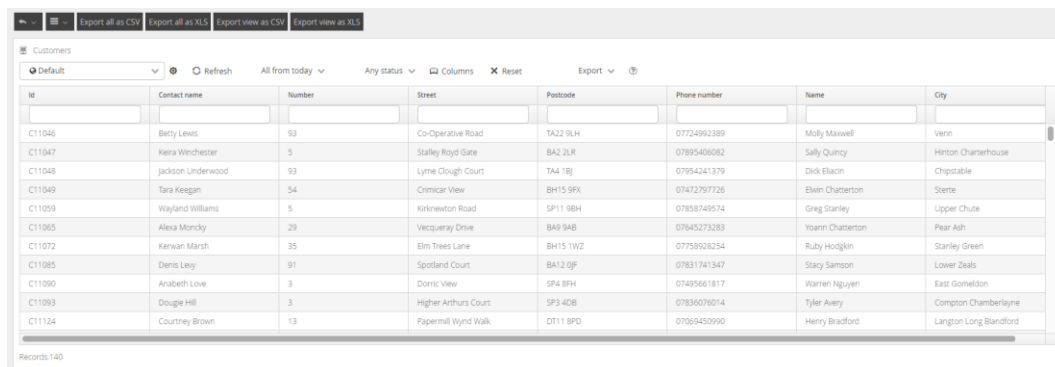
## Import/Export

The Import/Export function is now split out into individual options. Selecting Customer, Order, Job or Worker export.

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The screen will display a view which can be customized as per other view options.



ID	Contact name	Number	Street	Postcode	Phone number	Name	City
C11046	Betty Lewis	93	Co-Operative Road	TA22 9LH	07724962389	Molly Maxwell	Venn
C11047	Kiera Winchester	5	Stalley Road Gate	BA2 2LR	07895409082	Sally Quincey	Hinton Charterhouse
C11048	Jackson Underwood	93	Lyme Clough Court	TA4 1BJ	07954241379	Dick Elston	Chipstable
C11049	Tara Keegan	54	Crimcar View	BH15 9FX	07472797726	Elwin Chatterton	Stente
C11059	Wayland Williams	5	Kirknewton Road	SP11 9BH	07838749574	Greg Stanley	Upper Chute
C11065	Alexa Moncky	29	Vecqueray Drive	BA9 9AB	07645273283	Yvonn Chatterton	Pear Ash
C11072	Kerwan Marsh	35	Elm Trees Lane	BH15 1WZ	07758938254	Ruby Hodgkin	Stanley Green
C11085	Dennis Leys	91	Spotland Court	BA12 0JP	07831741347	Stacy Samson	Lower Zeals
C11090	Anabeth Love	3	Dorric View	SP4 8PH	07495661817	Warren Nguyen	East Gornedon
C11093	Dougie Hill	3	Higher Anthers Court	SP3 4DB	07836076014	Tyler Avery	Compton Chamberlayne
C11124	Courtney Brown	13	Papermill Wynd Walk	DT11 8PD	07069450990	Henry Bradford	Langton Long Blandford

The following buttons are available:

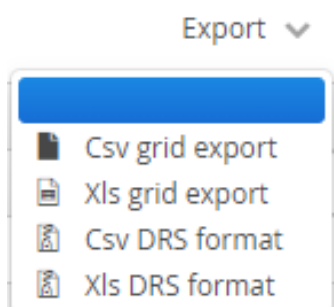
**Export All as CSV:** This will export an editable CSV document in the correct Import format.

**Export all as XLS:** This will export an editable XLS document in the correct Import format.

**Export View as CSV:** This will export the currently viewed detail in CSV format.

**Export View as XLS:** This will export the currently viewed detail in CSV format.

Selecting the functions from the Export Menu will also achieve the same ends.

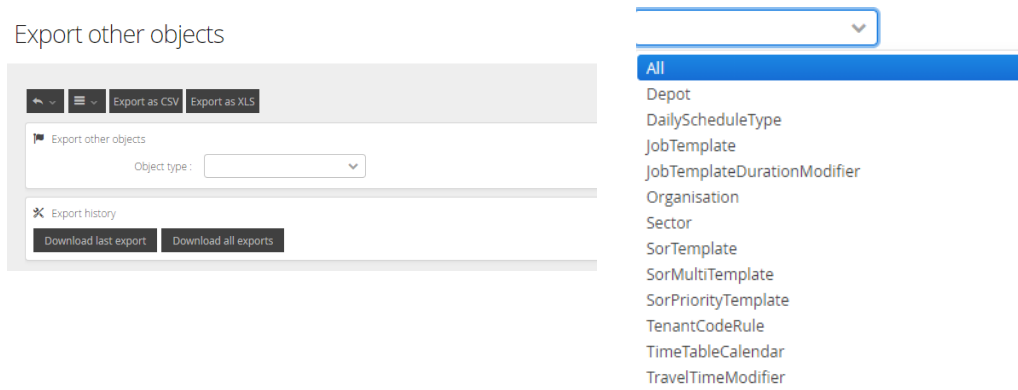


## Export Other Objects

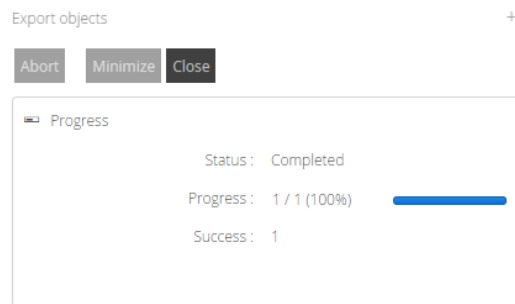
Selecting the Export Other Objects button will allow you to export objects which are not specifically identified in the Left Menu. Using the dropdown Object Type menu will provide you with the possible options.

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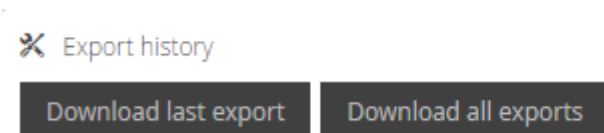
Export other objects



Selecting your required option and then clicking Export as CSV or Export as XLS will set the required export type.



This screen will display and show when Complete. When complete, click the button below 'Download Last Export'



This will download your requested export.

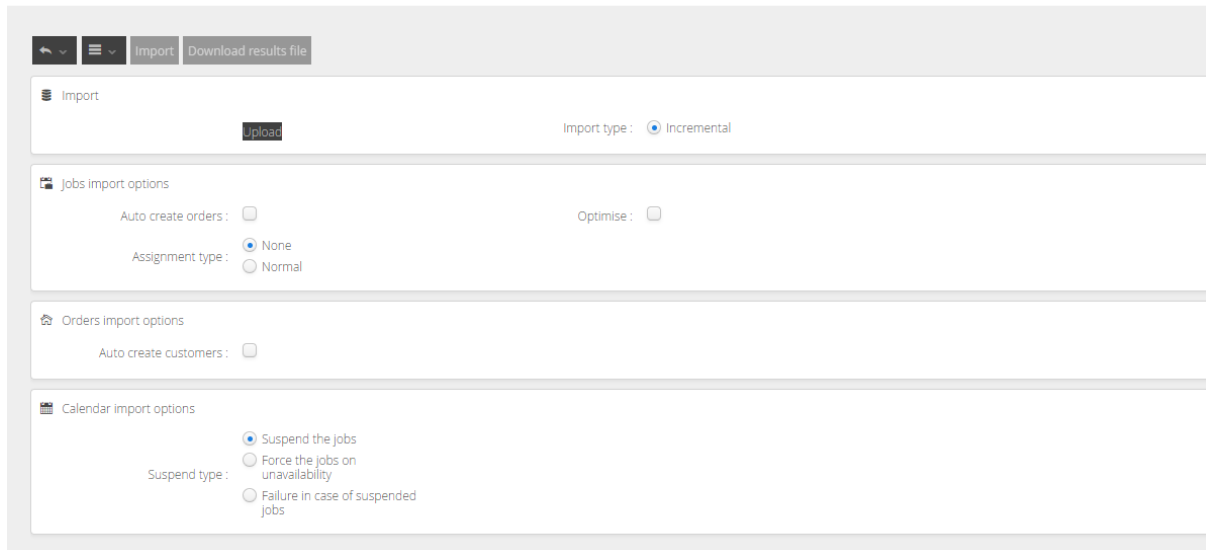
## Imports

The Import function follows the same process and parameters as 5.7. For full description of use, please refer to the User Guide attached in Appendix 1.

To use the Import function in V6, selecting the required file is done by clicking the **UPLOAD** button.

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### Import objects



The screenshot shows the 'Import' interface with the following elements:

- Navigation bar: Back, Home, Import, Download results file.
- Import section: An 'Upload' button and 'Import type: Incremental' (selected).
- Jobs import options:
  - Auto create orders: ☐
  - Assignment type: ☒ None, ☐ Normal
  - Optimise: ☐
- Orders import options:
  - Auto create customers: ☐
- Calendar import options:
  - Suspend type: ☒ Suspend the jobs, ☐ Force the jobs on unavailability, ☐ Failure in case of suspended jobs

Once selected and required parameters set, click the **IMPORT** button to commit the Import.

← ≡ Edit Add Delete Copy

Working hours calendars

Refresh   
 Columns   
 Reset   
 Keep   
 Export

<input type="checkbox"/>	Id	Name	Type
	<input type="text" value="CAL_STANDARD"/>	<input type="text" value="Working hours calendar"/>	<span style="color: blue; cursor: pointer;">[edit]</span>
<input type="checkbox"/>	CAL_STANDARD	Working hours calendar	Weekly
<input type="checkbox"/>	QUOTAS_CAL	QUOTAS_CAL	Weekly
<input type="checkbox"/>	SLL_TEST	SLL TEST	Weekly

- ☐ U8
- ☐ U9
- ☐ U10
- ☐ NEW
- ☐ 4764-test
- ☐ U15
- ☐ U1522
- ☐ U16
- ☐ U16w

Records: 12

← ≡ Edit

Working hours calendar
 

ID : CAL\_STANDARD
Name : Working hours calendar
Type : Weekly

---

Hidden travel time
 

Route begin (in minutes) : 0
Route end (in minutes) : 0

---

Working hours limitations
 

Use weekly quotas : No
Use daily quotas : No
Time in depot (in minutes) : 30
Time to go to depot (in minutes) : 0

---

Time Table
 

**Mon:** 08:00-18:00    **Lunch:** 60.0 Minutes Within 12:00-14:00

**Tue:** 08:00-18:00    **Lunch:** 60.0 Minutes Within 12:00-14:00

**Wed:** 08:00-18:00    **Lunch:** 60.0 Minutes Within 12:00-14:00

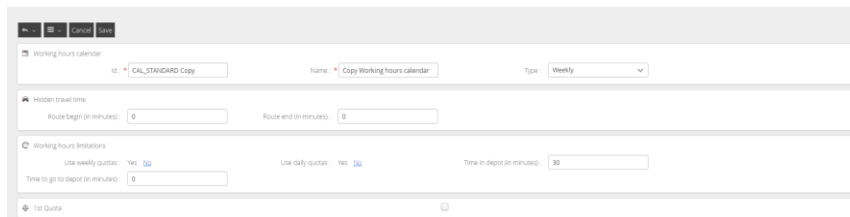
**Thu:** 08:00-18:00    **Lunch:** 60.0 Minutes Within 12:00-14:00

**Fri:** 08:00-18:00    **Lunch:** 60.0 Minutes Within 12:00-14:00

## Add/Edit/Copy

Using the Add, Edit or Copy options will allow you to Create a new Calender or Edit an existing calendar. In all cases, this screen will be displayed.

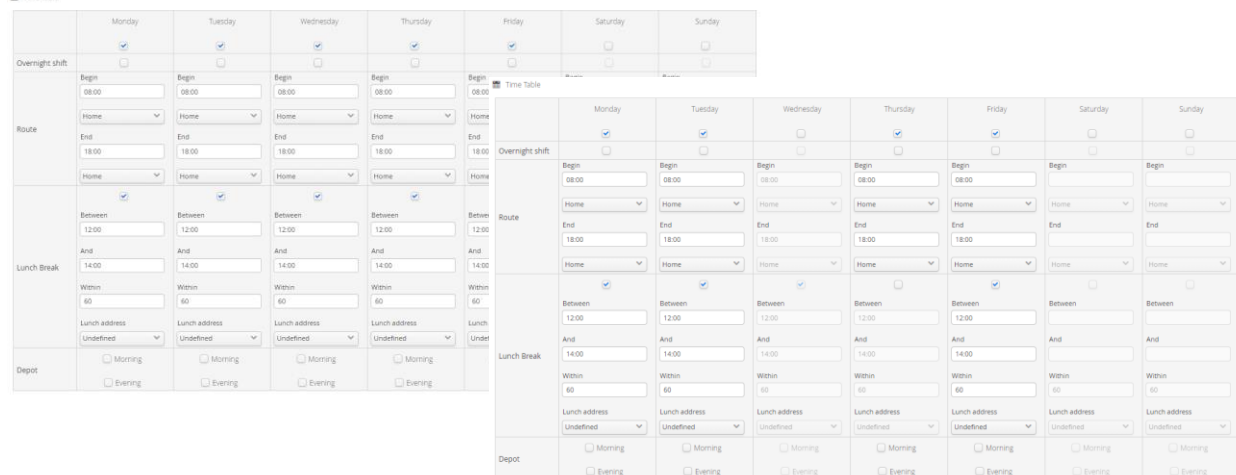
Working hours calendar



The form for creating or editing a working hours calendar. It includes fields for ID (CAL\_STANDARD Copy), Name (Copy Working hours calendar), and Type (Weekly). There are sections for hidden travel time (Route begin/end in minutes), working hours limitations (Use weekly/quarterly/daily quotas, Time to go to depot in minutes), and a 'Test Quota' button.

The Top Panel will allow you to amend the standard options on the diary. The bottom panel allows you to set the available days, working periods and lunchbreaks as required. Unchecking any given option will disable the option.

Time Table



The Time Table form, which is a grid-based interface for setting working hours and lunch breaks across the days of the week (Monday to Sunday). It includes sections for Overnight shift, Route (Begin, End, Home), Lunch Break (Between, And, Within, Lunch address), and Depot (Morning, Evening). The form is split into two panels, each showing a detailed view of the settings for each day.

After your changes have been made, Click Save to commit.

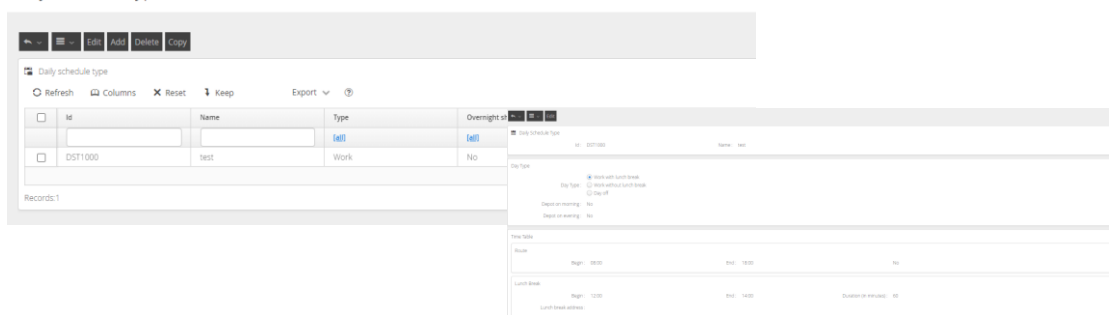
## Delete

Selecting a number of calendars and selecting Delete will remove the calender. This action is not reversible.

## Daily Schedule Types

Daily Schedule Types for Rotas are configured within the Daily Schedule Types Tab. Clicking on any single item will display the configured detail.

Daily schedule types



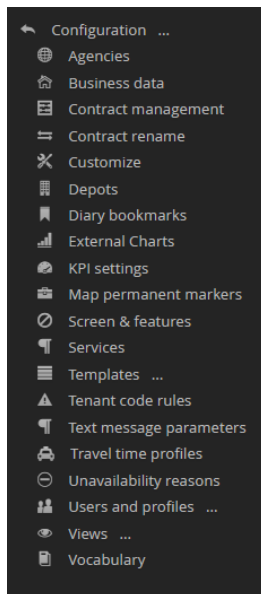
The Daily schedule types form, which is a table-based interface for managing daily schedule types. It includes a table with columns for Id, Name, Type, and Overnight shift. There are buttons for Refresh, Columns, Reset, Keep, and Export. A detailed view of a specific schedule type (DST1000) is shown on the right, including its Name, Type, and a Time Table for setting working hours and lunch breaks.



Selecting any number of objects and selecting Delete will remove the objects from the system. This action is not reversible.

## Configuration

Entering the Configuration from the Left Menu will result in the Left Menu displaying the Configuration options.

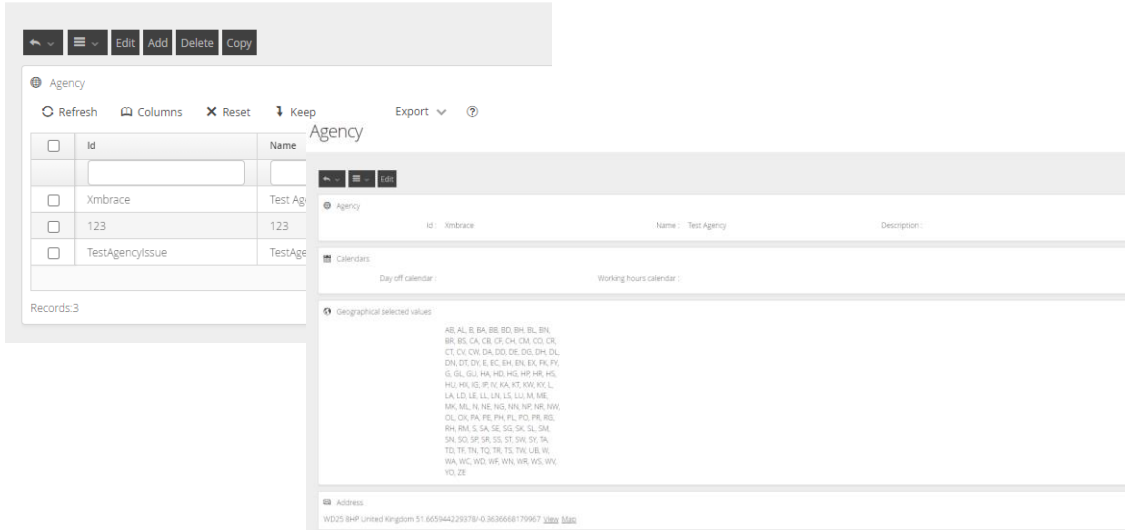


## Agency

Functions within the Agency tab work as per previous versions but viewing and amending the detail is visually different.

Clicking on any single Agency will show the configured properties.

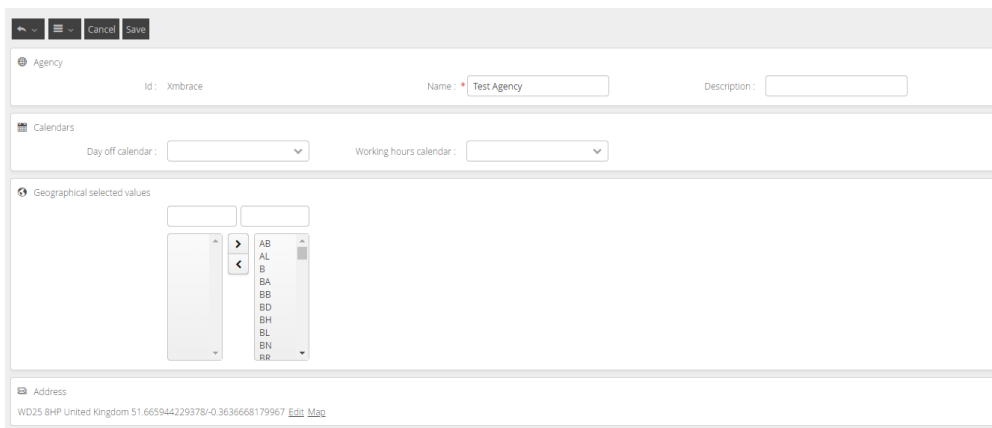
Page | 67 Agencies



The screenshot shows the 'Agency' tab interface. At the top, there are buttons for 'Edit', 'Add', 'Delete', and 'Copy'. Below these is a table with columns 'Id' and 'Name'. The table contains three rows: 'Xmbrace' (Test Ag), '123' (123), and 'TestAgencyIssue' (TestAge). A 'Records:3' indicator is at the bottom left. To the right of the table, there is a detailed view for the selected agency 'Xmbrace'. This view includes fields for 'Id' (Xmbrace), 'Name' (Test Agency), and 'Description'. Below these are sections for 'Calendars' (Day off calendar and Working hours calendar) and 'Geographical selected values' (a list of codes like AB, AL, B, BA, BB, BD, BH, BL, BN, BR, etc.). At the bottom, there is an 'Address' field with a map icon and a link to 'View Map'.

## Add/Edit/Copy

Add, Edit or Copy will either Create or allow you to modify an existing agency. In both cases the screen will look like this.



The screenshot shows the 'Agency' form for adding, editing, or copying an agency. It has a 'Cancel' and 'Save' button at the top. The form includes fields for 'Id' (Xmbrace), 'Name' (Test Agency), and 'Description'. Below these are sections for 'Calendars' (Day off calendar and Working hours calendar) and 'Geographical selected values' (a list of codes like AB, AL, B, BA, BB, BD, BH, BL, BN, BR, etc.). At the bottom, there is an 'Address' field with a map icon and a link to 'View Map'.

Once your amendments are complete. Click Save.

NOTE: Changes to an existing Agency may cause significant issues with scheduling.

## Delete

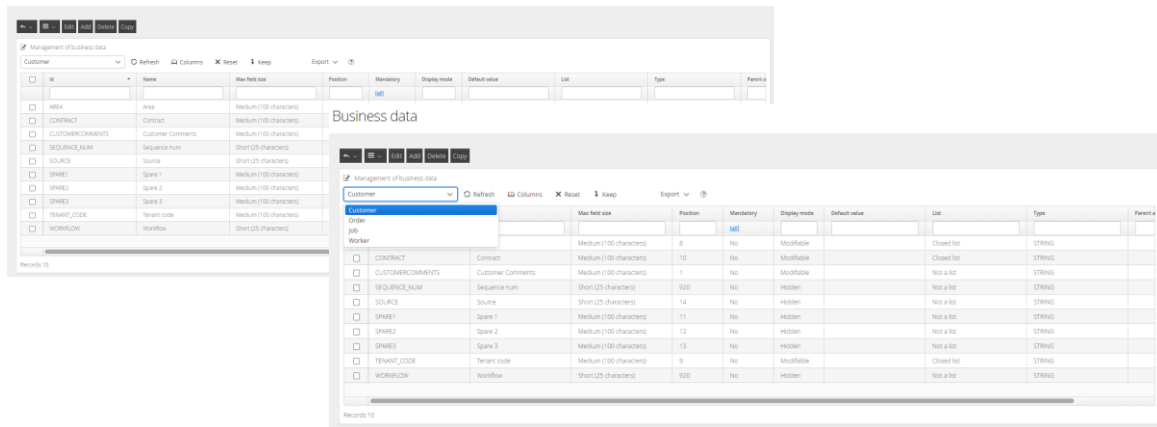
Delete will remove the selected Agency. This function cannot be reversed.

## Business Data

Business Data can be edited, created or deleted within this screen. Use the Object Type Dropdown to select the correct Object type to manage.

Business data

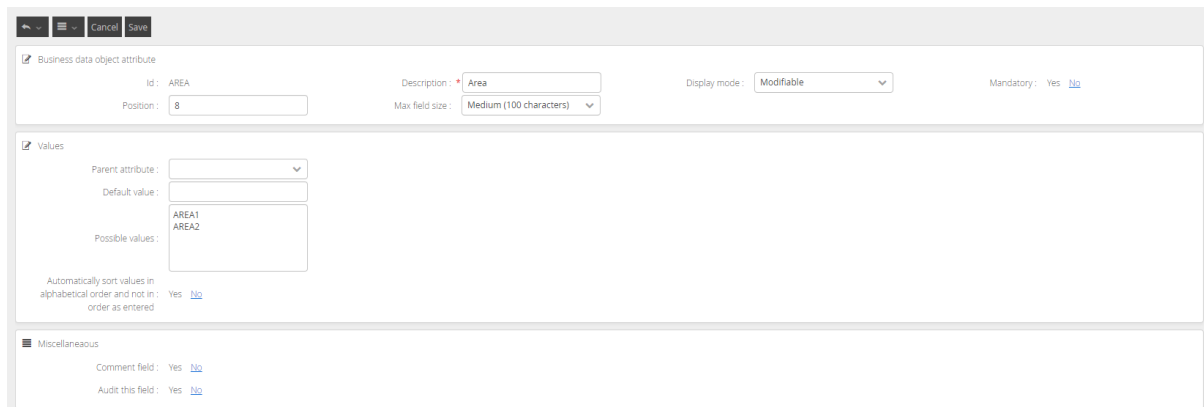
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The screenshot displays the 'Management of business data' interface. It features a table with columns for Name, Max field size, Position, Mandatory, Display mode, Default value, List, Type, and Parents. The table lists various business data objects such as AREA, CONTRACT, CUSTOMERCOMMENTS, SEQUENCE\_NUM, SOURCE, SPARE1, SPARE2, SPARE3, TENANT\_CODE, and WORKFLOW. The 'Customer' object is selected, and its details are shown in a separate pane on the right.

## Add/Edit/Copy

Add, Edit or Copy will allow you to Create or Modify a piece of Business Data. In both cases, a similar screen will be displayed, depending on the Business Data Type.



The screenshot shows the 'Business data object attribute' form. It includes fields for Id (AREA), Description (Area), Display mode (Modifiable), and Mandatory (Yes). There are also fields for Position (8) and Max field size (Medium (100 characters)). Below these fields, there is a 'Values' section with a dropdown for Parent attribute, a text box for Default value, and a list of Possible values (AREA1, AREA2). At the bottom, there is a 'Miscellaneous' section with checkboxes for Comment field and Audit this field, both set to Yes.

When you selections are complete, click Save.

## Delete

Selecting a number of objects and clicking Delete will remove the objects from the system.

NOTE: This option carries high risk and can cause significant issues with the scheduling solution.

## Contract Management

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

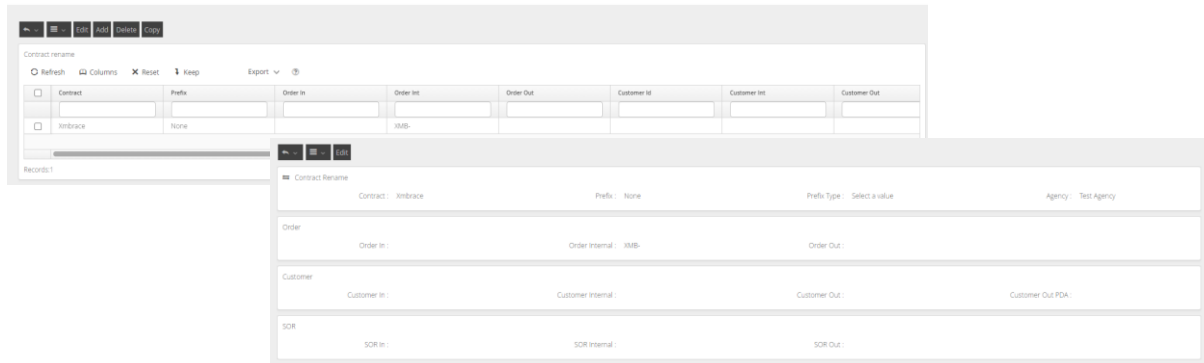
## Contract Rename

Contract Rename is now available for editing within the User Interface. Contract Rename is used to manage contract mapping for integrations between DRS and upstream systems, and also apply Contract Prefixing.

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All current Contract Mapping will be displayed. Clicking on any entry will display the configured details.

Contract rename list

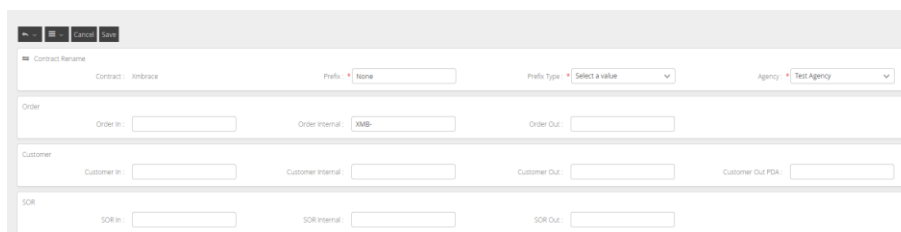


The screenshot shows the 'Contract rename list' interface. It features a table with columns for Contract, Prefix, Order In, Order Int, Order Out, Customer Id, Customer Int, and Customer Out. A detailed view of a selected entry is shown below the table, displaying fields for Contract, Prefix, Prefix Type, Agency, Order, Customer, and SOR, each with its respective In, Internal, and Out values.

## Add/Edit/Copy

Add, Edit or Copy will allow you to Create or Modify a Contract Rename value. In both cases, the following screen will be displayed. Available data may vary.

Contract rename



The screenshot shows the 'Contract rename' form interface. It includes fields for Contract, Prefix, Prefix Type, Agency, Order, Customer, and SOR, each with its respective In, Internal, and Out values. The form is designed for adding, editing, or copying contract rename values.

**Prefix Type:** The options here are Complex or Simple. Simple will use the value in the Prefix field and apply this to all objects on the Inbound create. Complex will apply Prefixing as dictated on the object panels.

**Prefix:** If Simple Prefix Type is used, this will be used to prefix all objects on the Inbound Create. It will also be used to remove the Prefix from the Outbound notification or response.

**<Object Name> In:** This will remove the Prefix value to the nominated Object on the Inbound Create if it exists.

**<Object Name> Internal:** This will add the Prefix value to the nominated Object on the Inbound Create. It will also remove the prefix for any outbound communications.

**<Object Name> Out:** This will remove the Prefix value from the nominated Object for any outbound communications.

Once you have completed your configurations, click Save.

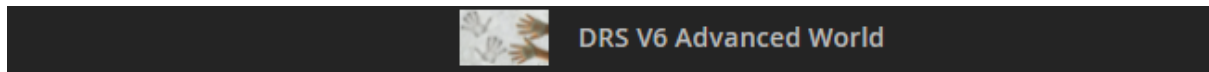
## Delete

Delete will remove the value from the configuration. Note, this cannot be reversed.

## Customize

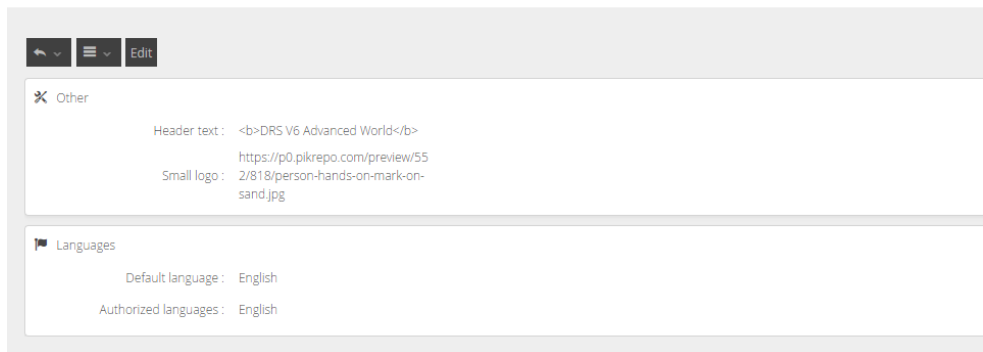
Customize will allow you to edit the Header Description and Logo within DRS.

Page | 70



Clicking Edit will allow you to make changes.

Customize

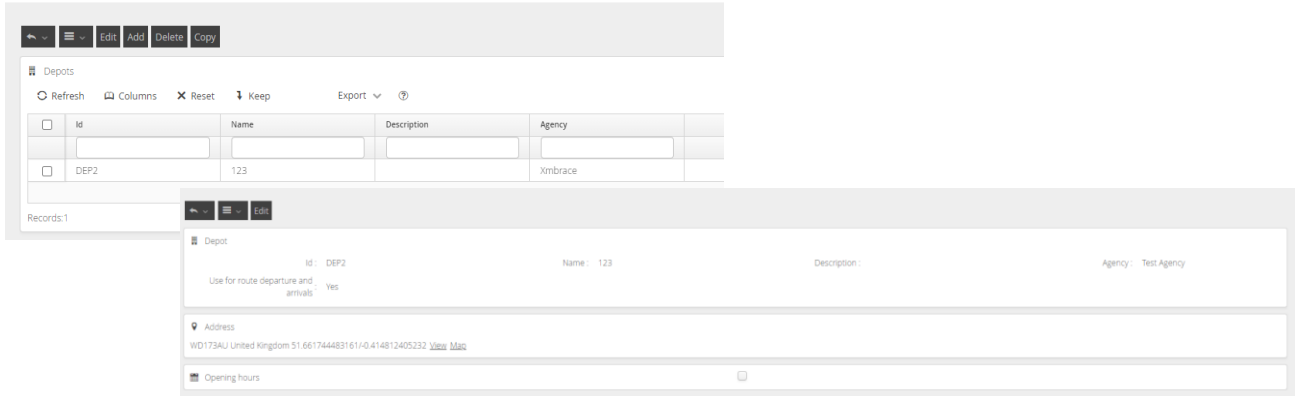
A light gray interface for customizing the header. At the top is a toolbar with a back arrow, a menu icon, and an "Edit" button. Below the toolbar are two sections. The first section, titled "Other" with a star icon, contains two fields: "Header text" with the value "<b>DRS V6 Advanced World</b>" and "Small logo" with the value "https://p0.plkrepo.com/preview/55/2/818/person-hands-on-mark-on-sand.jpg". The second section, titled "Languages" with a flag icon, contains two fields: "Default language" with the value "English" and "Authorized languages" with the value "English".

## Depots

Depots will allow you to configure static locations for use in functions such as the Working Hours Calendars. Clicking on a configured Depot will display the configured detail.

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Depots

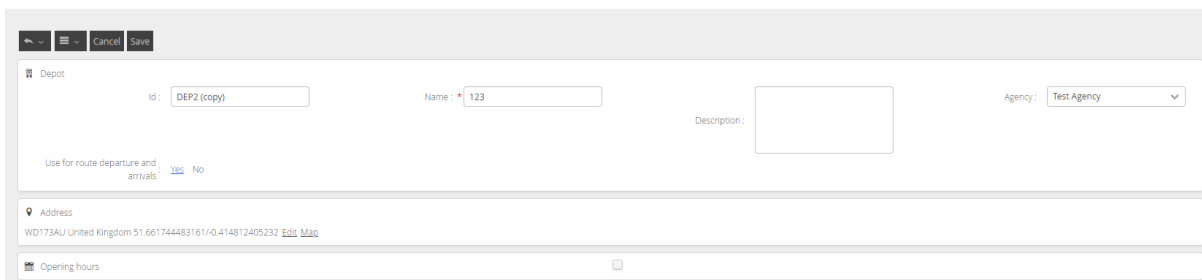


The screenshot shows the 'Depots' management interface. At the top, there are buttons for 'Edit', 'Add', 'Delete', and 'Copy'. Below this is a table with columns: 'Id', 'Name', 'Description', and 'Agency'. The table contains one record with 'Id: DEP2', 'Name: 123', 'Description: ', and 'Agency: xmbrace'. Below the table, there is a 'Records: 1' indicator. To the right, a detailed view of the selected depot is shown, including fields for 'Id: DEP2', 'Name: 123', 'Description: ', 'Agency: Test Agency', 'Use for route departure and arrivals: Yes', 'Address: WD173AU United Kingdom 51.661744483161/-0.414812405232', and 'Opening hours: '.

## Add/Edit/Copy

Add, Edit and Copy will allow you to Create or Modify a Depot location. In both cases, the following screen will be displayed.

Depot



The screenshot shows the 'Depot' configuration form. It has buttons for 'Cancel' and 'Save'. The form includes fields for 'Id: DEP2 (copy)', 'Name: 123', 'Description: ', and 'Agency: Test Agency'. There is a checkbox for 'Use for route departure and arrivals: Yes' and a 'No' option. Below this is the 'Address' field with the value 'WD173AU United Kingdom 51.661744483161/-0.414812405232' and a 'View Map' link. At the bottom is the 'Opening hours' field.

When adding a location, ensure to Validate the address so DRS can GeoTag the location. Complete the other required fields and click Save.

## Delete

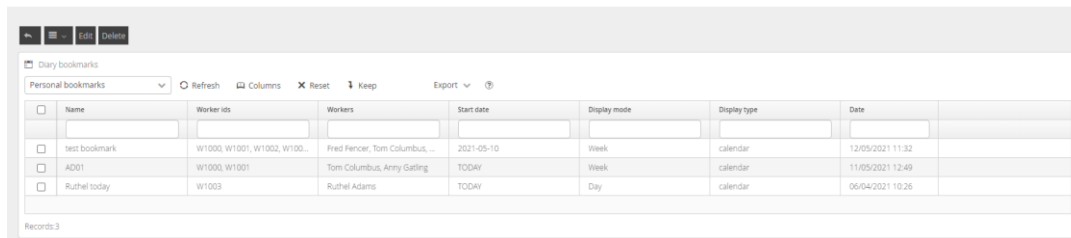
Delete will remove an object from the configuration. This function cannot be undone.

## Diary Bookmarks

If you have the right level of permissions, you can manage Personal and Shared Bookmarks, both Object and Diary.

Diary bookmarks

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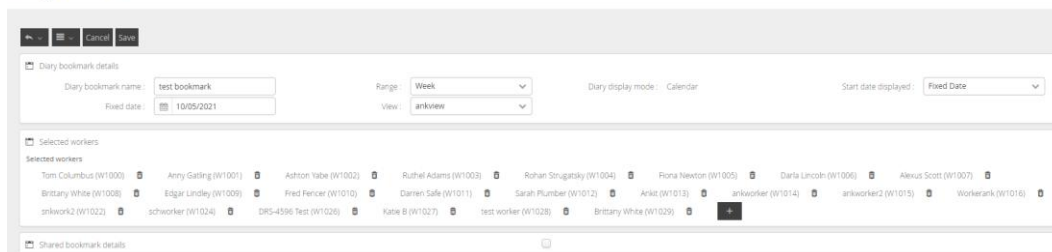
Name	Worker ids	Workers	Start date	Display mode	Display type	Date
test bookmark	W1000, W1001, W1002, W100...	Fred Fencer, Tom Columbus...	2021-05-10	Week	calendar	12/05/2021 11:32
AD001	W1000, W1001	Tom Columbus, Anny Galling	TODAY	Week	calendar	11/05/2021 12:49
Ruthel today	W1003	Ruthel Adams	TODAY	Day	calendar	06/04/2021 10:26

Using the Object Dropdown you can select the type of bookmark to manage.

## Edit

Editing a Bookmark will result in the following screen display.

Diary bookmark



Diary bookmark details

Diary bookmark name:  Range:  Diary display mode:  Start date displayed:

Fixed date:  View:

Selected workers


Selected workers

Tom Columbus (W1000) Anny Galling (W1001) Ashron Yabe (W1002) Ruthel Adams (W1003) Rohan Srugatsky (W1004) Fiona Newton (W1005) Darla Lincoln (W1006) Alexus Scott (W1007)

Brittany White (W1008) Edgar Lindley (W1009) Fred Fencer (W1010) Darren Safe (W1011) Sarah Plumber (W1012) Arke (W1013) arkworker (W1014) arkworker2 (W1015) Workerank (W1016)

arkwork2 (W1022) schworker (W1024) DRS-4596 Test (W1026) Kate B (W1027) test worker (W1028) Brittany White (W1029)

Shared bookmark details

Modify the selected workers by clicking the  button. Once your changes are complete, click Save.

## Delete

The Delete function will remove any selected Bookmark. This task cannot be undone.



## External Charts

The External Charts feature allows you to embed Anonymous charts from your Infosuite installation into the DRS Home screen.

Charts must be configured to Anonymous within Infosuite to display them.

Page | 73 The Embedded chart URL for each chart within Infosuite must be unique.

External charts



## Internal Configuration

The following needs to be added to the httpd-conf file to allow DRS to correctly access the charts.

1. On your DRS Server, in DRS\APACHE\conf, edit httpd.conf file.
2. in the <VirtualHost \*:443> part and before ###NEW\_ACCOUNT\_SPACE### line add the following lines

```
<Location /pi >
ProxyPreserveHost On
ProxyPass http://xxx.xxx.xxx.xxx:80/pi
connectiontimeout=86400 timeout=86400
ProxyPassReverse http://DRS:80/pi/
ProxyPassReverseCookiePath /pi /pi
ProxyPassReverseCookieDomain devBCO localhost
ProxyPassReverseCookieDomain 127.0.0.1 localhost
</Location>
```

3. where xxx.xxx.xxx.xxx is the IP address of your infosuite server
4. restart your apache service

Once this redirection is done, connect to DRS to change the External chart URL into something like :

[https://drsServer/pi/chart?anonymous=true#chart-filter/nnn\\_n](https://drsServer/pi/chart?anonymous=true#chart-filter/nnn_n)

## Configuring Infosuite to allow External Chart Access

Infosuite will need to be configured to allow for charts to be accessed as an iFrame request. To do this:

1. Log onto your Infosuite Server
2. Run the Dashboard PortSelector or Admin Console (version dependant) as an Administrator
3. Once it is launched go into tab security or Advanced and change :
4. X Frame Host from 'Deny' to 'All'
5. Trusted Hosts from 'None' to 'Self'

Dashboard Configuration

LicenceTomcat PortsOther PortsServerAuthenticationAdvanced

This tab contains advanced settings that are available on the Tomcat server. Only change these if you know what you're doing.

Tomcat Settings

Accept Count:

Connection Timeout:

Maximum Threads:

Spare Threads Min:  Max:

Proxying / Rewriting

Scheme:  ☐ Secure

Proxy Host:  Port:

CORS/Embedding/Frame Ancestors

X Frame Host: 

Deny

 Host:

Trusted Hosts: 

None

 Hosts:

Save Advanced Config

Close & Start Dashboard Service

Dashboard Configuration

LicenceTomcatPortsSecurityRepository

Reload last used security settings

Reload security default settings

### Embedding

☐ Enable Windows Authentication

X Frame Host  
all

Custom X Frame Host  
\*

Trusted Hosts  
self

Custom Trusted Hosts  
'self'

### Cookies

☐ Secure (You are using https)

Same-Site  
none

### Recommendations

- If you use OpenID Connect authentication you should use https, secure cookies and same-site set to none.
- If you embed in another application you should use https, secure cookies and same-site set to none as well as a properly configured trusted hosts.

Apply Config

Import Config

Export Config

### Setting Charts to Anonymous.

Refer to the attached Infosuite User Guide in Appendix 2 on how to set charts to Anonymous.

### Configuring a Chart

Selecting Add will display this screen.

Name your chart and paste the External Chart URL into the appropriate boxes and click Save.

Chart popup + ×

Cancel Save


 Chart

Chart name \*

External chart URL \*

Depending on your configuration, your Home Screen may now show a combination of charts. Charts will be displayed in the order of which they are entered.

## KPI Settings

KPI Settings are all configured on a single screen now. All previous KPI Settings will be migrated into this screen.

### Page | 76 Add/Edit

In all instances the Add or Edit function will allow you to Create or Modify an entry.

### Delete

Delete will remove the selected Object. This action is not reversible.

---

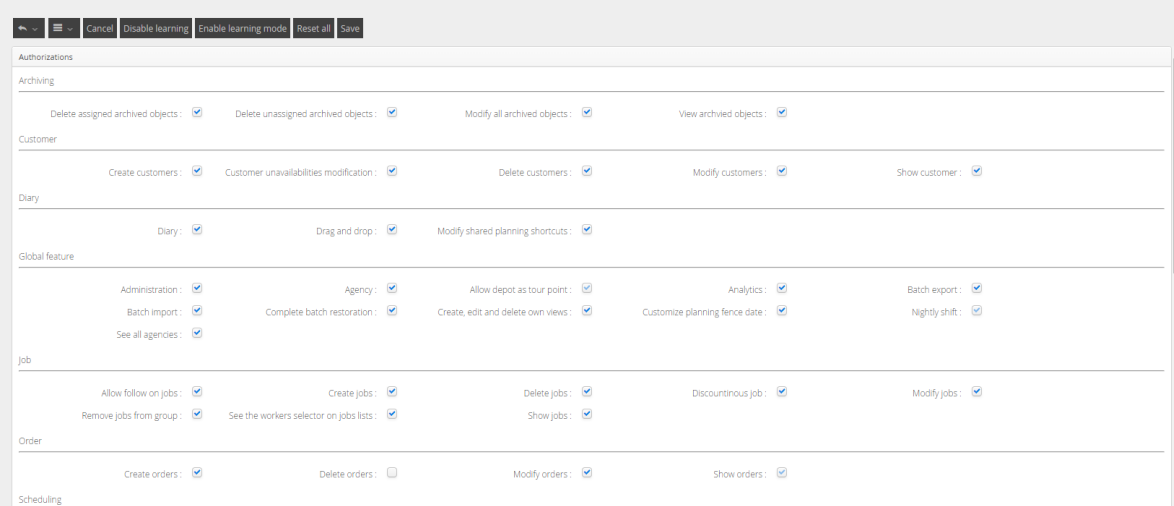
## Screens and Features

The Screens and Features function allows you to globally disable functions, buttons, options and fields for all profiles.

Screens and Features will over-ride any settings on Profiles or other features.

Review the Inheritance section in this document for more information.

### Screen configuration



Unchecking any option will uncheck that option in all other security levels.

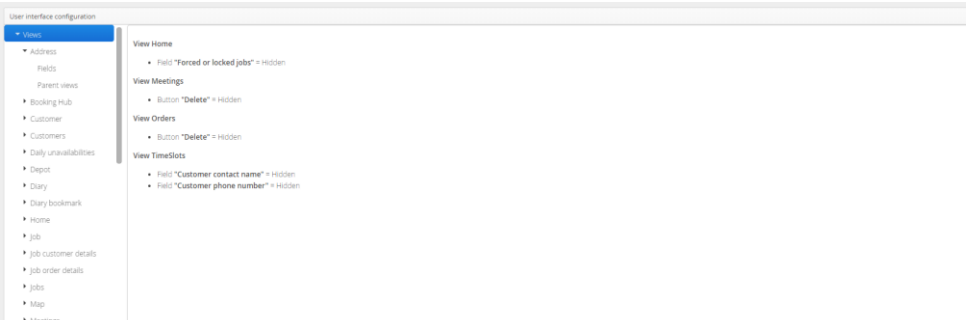
**Reset All:** Reset All will reset all settings within Screens and Features back to factory defaults.

## Learning Mode

When you turn on learning mode you can go to any screen and make changes to the visibility of any buttons or fields that are manageable. This means you can make the changes to make them hidden or read while you are on the actual screen instead of on the screens and features page.

## User Interface Configuration

Changing values within the User Interface Configuration will over-ride settings within other sections of the solution.



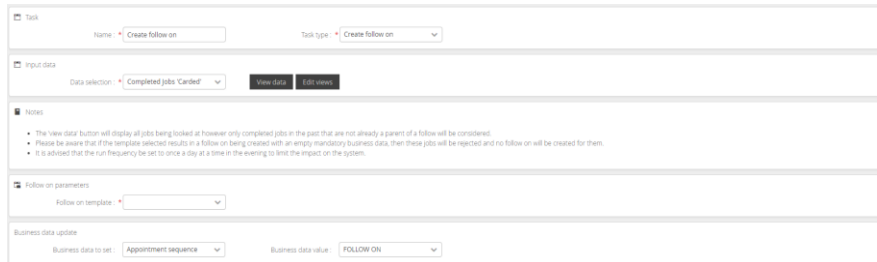
**Note:** This screen will allow you to set values as HIDDEN. If you set a value which is marked as MANDATORY to HIDDEN, any object which are attempt to make where this value doesn't have a default will fail.

## Services

Configuring a service has no material change in V6. Please refer to the 5.7 User Guide. Appendix 1. Beyond this, there are some new Service options available.

### Page | 78 Auto-Create Follow On

The Auto-Create Follow On service will create a new Job Object for all identified jobs. These Job Objects will be created as Follow On's to the parent Job.

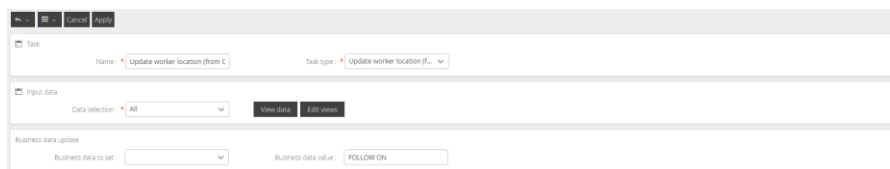


The screenshot shows the configuration form for the 'Create follow on' service. It includes fields for 'Name' (set to 'Create follow on') and 'Task type' (set to 'Create follow on'). The 'Input data' section shows 'Data selection' set to 'Completed jobs "Carded"'. The 'Notes' section contains three bullet points: 'The view data button will display all jobs being looked at however only completed jobs in the past that are not already a parent of a follow on will be considered.', 'Please be aware that if the template selected results in a follow on being created with an empty mandatory business data, then these jobs will be rejected and no follow on will be created for them.', and 'It is advised that the run frequency be set to once a day at a time in the evening to limit the impact on the system.' The 'Follow on parameters' section shows 'Follow on template' set to a dropdown. The 'Business data update' section shows 'Business data to set' set to 'Appointment sequence' and 'Business data value' set to 'FOLLOW ON'.

This service can use any configured Follow On Template. As with other Services, a single Business Data Object can also be updated.

### Update Worker Location (OOW)

If you also have Advanced OOW, DRS can retrieve the last known location of any configured Worker object to display on the DRS Map.



The screenshot shows the configuration form for the 'Update worker location (from C)' service. It includes fields for 'Name' (set to 'Update worker location (from C)') and 'Task type' (set to 'Update worker location (from C)'). The 'Input data' section shows 'Data selection' set to 'All'. The 'Business data update' section shows 'Business data to set' set to a dropdown and 'Business data value' set to 'FOLLOW ON'.

This can provide you with real time location reporting when using Maps to make decisions around immediate planning decisions.

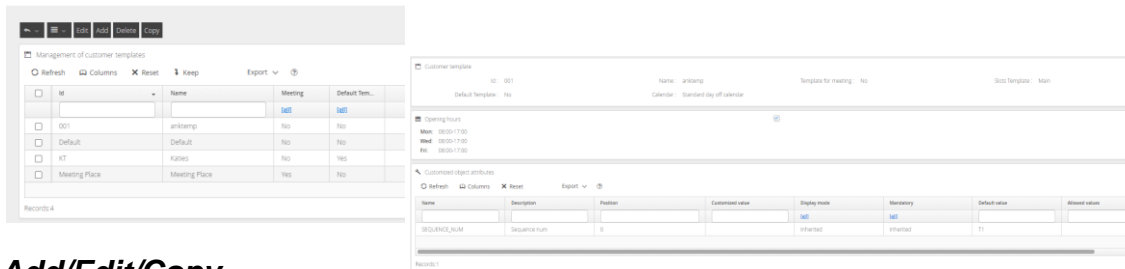
## Templates

All Templates are collected for configuration under the Template option. Expanding this option will display all configurable options.

## Customer

All Customer Templates configured will be on display when selected. Clicking on any item will display the configured detail.

Customer templates



ID	Name	Meeting	Default Tem...
001	anktemp	No	No
Default	Default	No	No
KT	Kates	No	Yes
Meeting Place	Meeting Place	Yes	No

Records: 4

Customer template details for ID: 001, Name: anktemp, Template for meeting: No, Slots Template: Main.

Opening hours: Monday (08:00 to 17:00), Tuesday (08:00 to 17:00), Wednesday (08:00 to 17:00), Thursday (08:00 to 17:00), Friday (08:00 to 17:00), Saturday (08:00 to 17:00), Sunday (08:00 to 17:00).

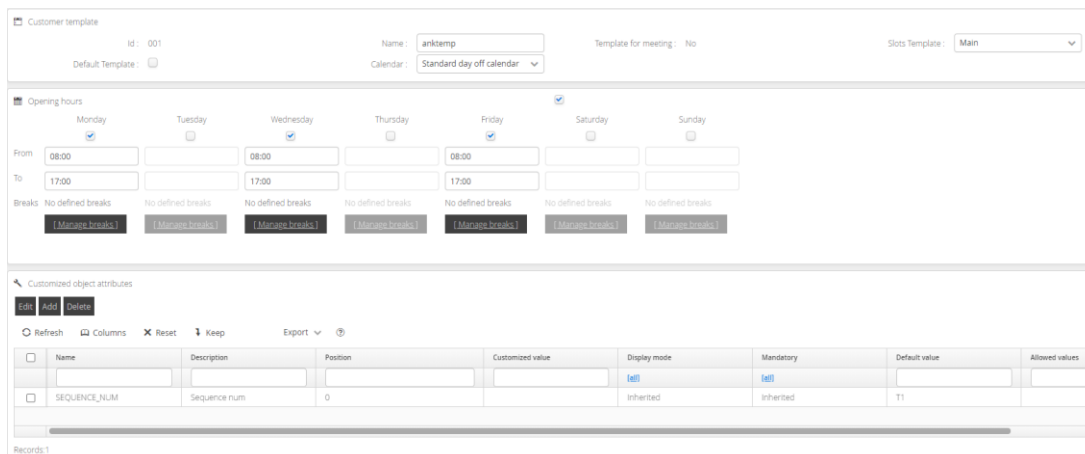
Customized object attributes table:

Name	Description	Position	Customized value	Display mode	Mandatory	Default value	Allowed values
SEQUENCE_NUM	Sequence num	0		Inherited	Inherited	T1	

Records: 1

## Add/Edit/Copy

Add, Edit or Copy will allow you to Create or Modify a Location Template. In all cases, the following screen will be displayed. Some of your fields may be pre-populated.



Customer template configuration for ID: 001, Name: anktemp, Template for meeting: No, Slots Template: Main.

Opening hours: Monday (08:00 to 17:00), Tuesday (08:00 to 17:00), Wednesday (08:00 to 17:00), Thursday (08:00 to 17:00), Friday (08:00 to 17:00), Saturday (08:00 to 17:00), Sunday (08:00 to 17:00).

Customized object attributes table:

Name	Description	Position	Customized value	Display mode	Mandatory	Default value	Allowed values
SEQUENCE_NUM	Sequence num	0		Inherited	Inherited	T1	

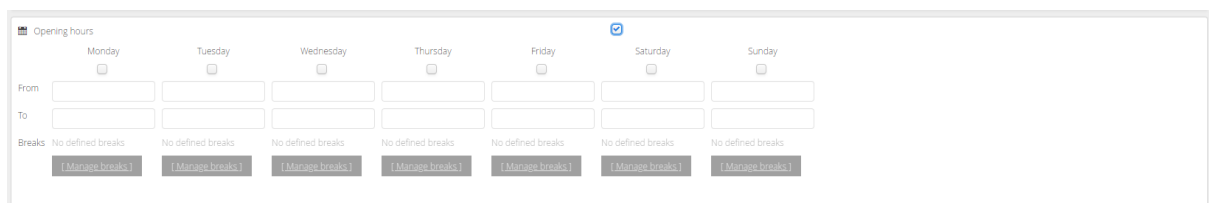
Records: 1

Set the appropriate Template details, ID, Name etc.



Opening hours: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday.

To set Opening Hours, first enable the Opening Hours section with the checkbox.



Opening hours: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday.

Customized Object Attribute values can be set also in this section. To learn more about Object Attribute Inheritance, review the 5.7 User Guide in Appendix 1.

Customized object attributes

<input type="checkbox"/>	Name	Description	Position	Customized value	Display mode	Mandatory	Default value	Allowed values
<input type="checkbox"/>					[all]	[all]		

Records:0

## Delete

Delete will remove the selected Object. This action is not reversible.

## Diary

The Diary Template will allow you to customize the look and feel of the diaries. All currently configured Diary Templates will be listed here. Clicking on an option will display the configuration of the selection.

Diary

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	arkview	
<input type="checkbox"/>	Gantt view	Gantt view
<input type="checkbox"/>	xt	xt
<input type="checkbox"/>	Standard	Standard

Records:4

Diary template information

Name: Gantt view  
 Description: Gantt view  
 Display mode: Gantt  
 Gantt view days to display: 3  
 Display view from (hour): 7  
 Display view to (hour): 18  
 Default Configuration: No  
 Is a system configuration: No  
 Enable right mode: No

Title configuration

Select element to display: jobid and jobName

Title colour configuration

Background colour configuration

Left bar colour configuration

Pad content configuration

Right panel configuration

Tooltip configuration

Left strip configuration

Right strip configuration

Unavailabilities colour configuration

## Add/Edit/Copy

Add, Edit or Copy will allow you to Create or Modify a Diary configuration. In both cases, you will be presented with the following screen.

Diary template information

Name: Copy of Standard  
 Description: Copy of Standard  
 Display mode: Calendar  
 Gantt view days to display: 1  
 Display view from (hour): 0  
 Display view to (hour): 23  
 Default Configuration: ☐  
 Is a system configuration: No  
 Enable right mode: ☐

Title configuration

Select element to display: jobid ☐ And JobName ☐ Add pad content configuration

Title colour configuration

Background colour configuration

Left bar colour configuration

Pad content configuration

Right panel configuration

Tooltip configuration

Left strip configuration

Right strip configuration

Unavailabilities colour configuration

The template information window will allow you to set the relevant settings for the template.





Diary template information

Name: Copy of Standard  
 Description: Copy of Standard  
 Display mode: Calendar  
 Gantt view days to display: 1  
 Display view from (hour): 0  
 Display view to (hour): 23  
 Default Configuration: ☐  
 Is a system configuration: No  
 Enable right mode: ☐

Expanding any of the menus in the Configuration area will expose the configuration for that area.



Title configuration


Select element to display: **JobId**   And **JobName**   Add rad content configuration


Title colour configuration

Background colour configuration

Left bar colour configuration

Pad content configuration

 Right panel configuration


 Tooltip configuration




Left strip configuration

Right strip configuration


Unavailabilities colour configuration




Title colour configuration




If the value of **Job:MEETING** 




= true Then display   




+




Else If the value of **Job:Status** 

= planned Then display   

= despatched Then display   


= accepted Then display   




= started Then display   

= completed Then display   

+

Add else if

Else display 

- Make changes by clicking on the colour swatch.
- Change the compared value by clicking on the  icon and making the change.
- Remove a compared value by clicking on the  icon.
- Add a compared value by clicking the  icon.
- Add an extra branch to the comparison tree (Else IF) by clicking the [Add else if](#) link.

## Follow On

In V6, multiple Follow On Templates can be created. For regular user interacted follow-ons, the Default Template will be used. Alternative Follow On Templates will be used when configuring the new Follow On Creation Service.

When selecting the Follow On option, the configured templates will display. Clicking on a single Template will display the configured detail.

Follow on job templates

Edit

Add

Delete

Copy

Management of follow on job templates

Refresh

Columns

Reset

Keep

Export

Template name	Description	Default temp...
Auto 3	Auto 3	
Auto 4	Auto 4	
Auto 5	Auto 5	
Auto2	Auto2	
default	default	

Follow on job template

Name: default

Allow on completed order: No

Allow duration charge: Yes

Allow job template changes: Yes

Calculation new job duration: From parent job

Accepted, Completed, Dispatched, Planned, Started, Acknowledged

Job status allowed:

Business data configuration

Refresh

Columns

Reset

Export

Name	Description	Data source	Customized value	Display mode	Allowed values	Mandatory	Position
ACTION_TAKEN	Action taken	customized		list		list	0
APPOINTMENT_REASON	Appointment reason	customized	FOLLOW ON	Hidden		Inherited	0
APPOINTMENT_SEQUENCE	Appointment sequence	customized	FOLLOW ON	Modifiable	FOLLOW ON FIRST	Inherited	1
BOOKING_SUBTYPE	Booking subtype	fromParent		Hidden		Inherited	0
BOOKING_TYPE	Booking type	fromParent		Hidden		Inherited	0
EMERGENCY	Emergency	fromParent		Modifiable	NO/YES	Inherited	2
FOLLOW_ON_NEXT_TASK	Follow on next task	customized		Hidden		Inherited	0
JOB_IDENTITY	jeopardy	fromParent		Hidden		Inherited	0
JOB_CODE	job code	fromParent		Hidden		Inherited	0
LAST_UPDATED	Last updated	customized		Hidden		Inherited	0
OPERATIVE_COMMENTS	Operative comments	fromParent		Hidden		Inherited	0

Records 5

Records 25

Configuring Follow On Template is the same as previous 5.7 releases. Please refer to the 5.7 User Guide in Appendix 1.

## Delete

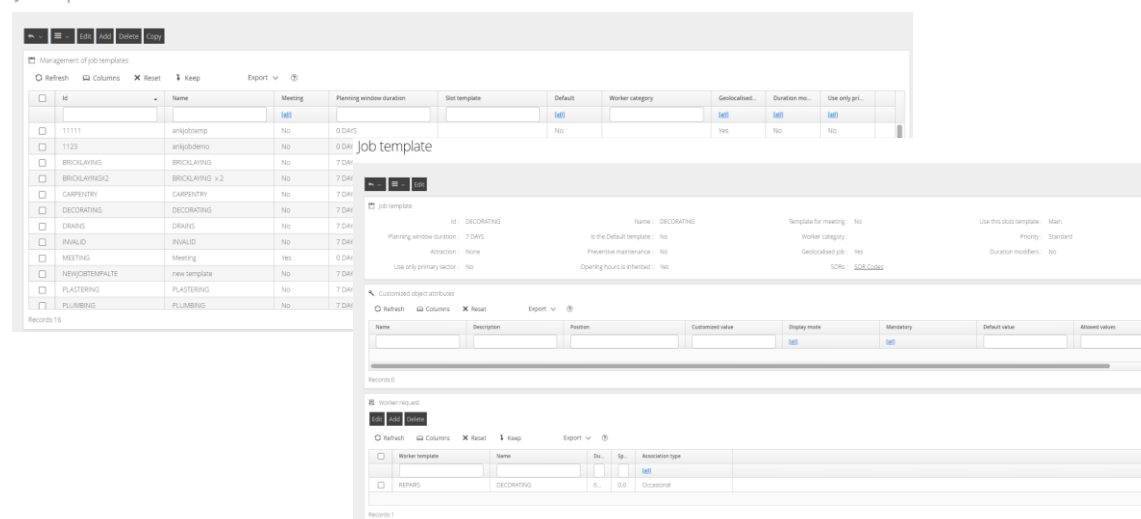
Delete will remove the selected Object. This action is not reversible.

## Job

Job Templates are now configured under this menu. Their overall function is the same as previous versions however their configuration screens have now changed.

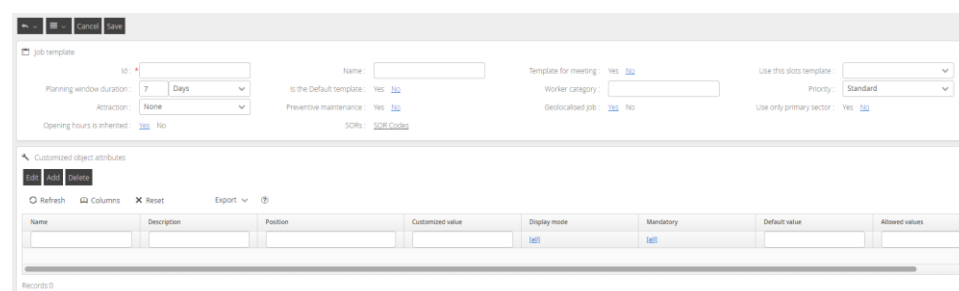
Entering this menu will display all currently configured Job Templates and clicking on any Job Template will display the configured detail.

Job templates

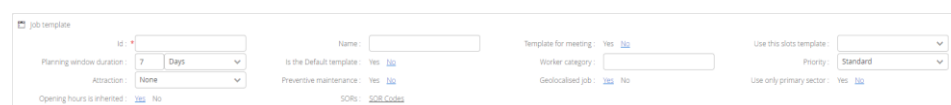


## Add/Edit/Copy

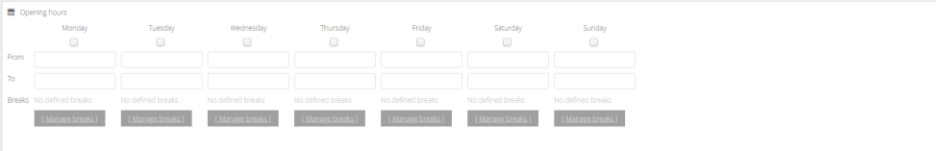
Add, Copy and Edit will allow you to Create or Modify a Job Template. In both cases, a screen similar to this will be displayed. Some of your options may be pre-populated.



Template Header Details are completed in the Job Template section. This sets the defaults that the template will use.



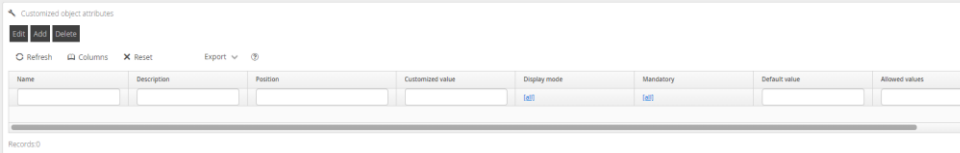
Opening Hours will be inherited by default on new Job Templates. Where they are otherwise set on existing templates, or if specific hours of availability are required for this Job Template, No should be selected to display this window.



Opening hours configuration form showing days of the week (Monday to Sunday) and time slots (From, To) for each day. Breaks are defined for each day.

Checking the boxes on the required days and setting the appropriate times will create availability for these tasks in only these time windows.

Object Attribute Customization can be completed by adding the required objects to this table



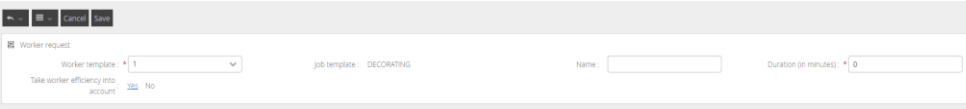
Customized object attributes table with columns: Name, Description, Position, Customized value, Display mode, Mandatory, Default value, Allowed values. The table is currently empty.

When you Save the Template detail, this will then show you the Worker Request option.



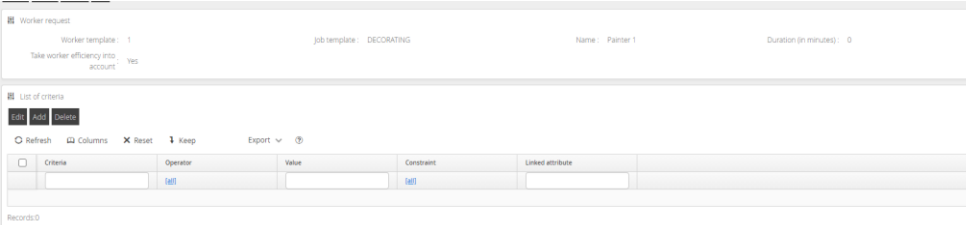
Worker request table with columns: Worker template, Name, De., Sp., Association type. The table is currently empty.

Clicking Add will allow you to Add a new Worker Request.



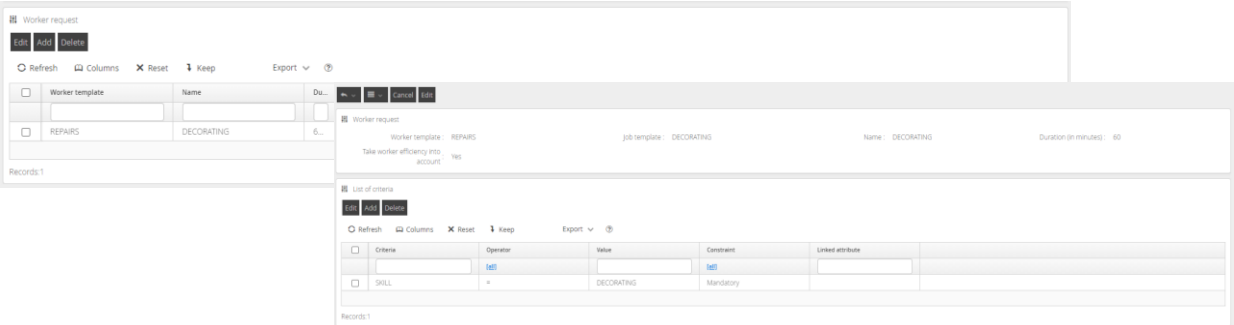
Worker request detail form with fields: Worker template (1), Job template (DECORATING), Name (Painter 1), Duration (in minutes) (0). There is a checkbox for "Take worker efficiency into account" with a "Yes" button.

Completing this detail and clicking SAVE will display the Criteria panel.



Criteria panel with columns: Criteria, Operator, Value, Constraint, Linked attribute. The table is currently empty.

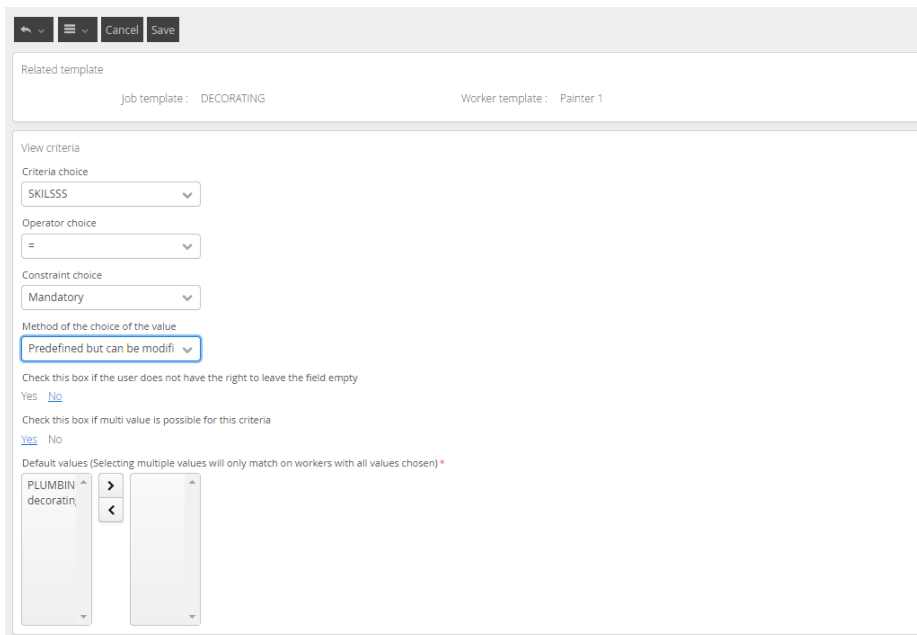
If there is a preconfigured request, clicking on the request will display the configured detail.



Worker request detail form showing a preconfigured request. The Worker template is set to "REPAIRS", Job template is "DECORATING", Name is "DECORATING", and Duration (in minutes) is "60". The "Take worker efficiency into account" checkbox is checked with a "Yes" button. Below the form is the Criteria panel with one row: Criteria "SKILL", Operator "+", Value "DECORATING", Constraint "Mandatory", and Linked attribute.

In both cases, use the Add button to add a new Scheduling Criteria, or the Edit button to modify an existing Criteria. The displayed screen will look similar to this. Depending on the Criteria selected, your options may vary.

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Related template

Job template : DECORATING Worker template : Painter 1

View criteria

Criteria choice  
SKILLS

Operator choice  
=

Constraint choice  
Mandatory

Method of the choice of the value  
Predefined but can be modified by the user

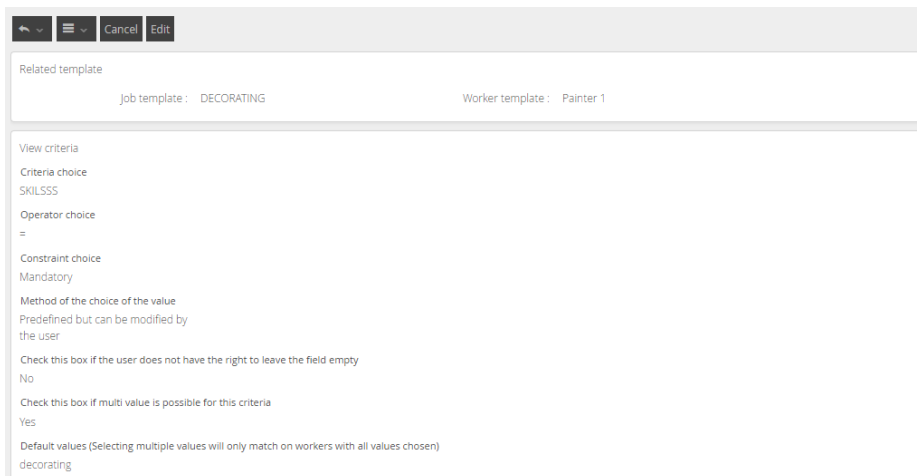
Check this box if the user does not have the right to leave the field empty  
Yes [No](#)

Check this box if multi value is possible for this criteria  
[Yes](#) No

Default values (Selecting multiple values will only match on workers with all values chosen) \*

PLUMBING decorating

Set your options appropriately and click SAVE.



Related template

Job template : DECORATING Worker template : Painter 1

View criteria

Criteria choice  
SKILLS

Operator choice  
=

Constraint choice  
Mandatory

Method of the choice of the value  
Predefined but can be modified by the user

Check this box if the user does not have the right to leave the field empty  
No

Check this box if multi value is possible for this criteria  
Yes

Default values (Selecting multiple values will only match on workers with all values chosen)

decorating

The back button can then be used to navigate back to your required window. Clicking Edit again will allow you to resolve any issues with the set configuration.

## Delete

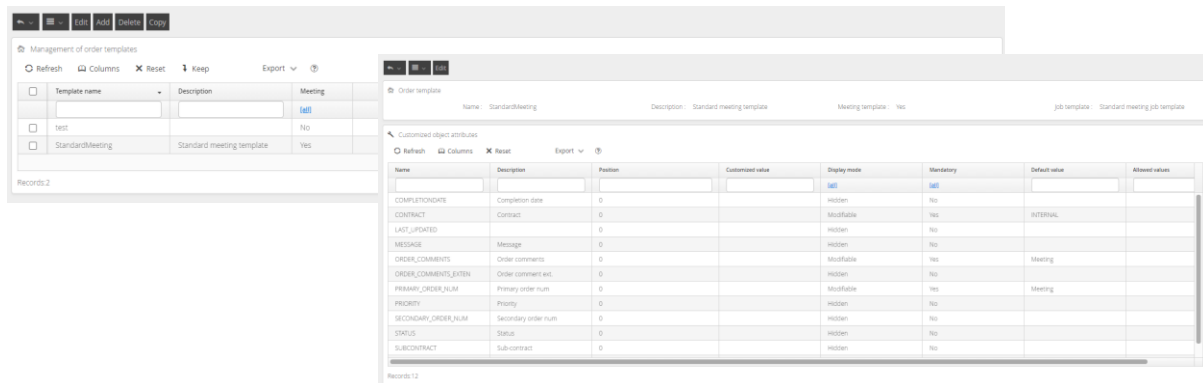
Delete will remove the selected Object. This action is not reversible.

## Order

Order Templates are configured similarly to Job Templates however have one fewer levels to configure. Commonly Order Templates are used for Meeting configuration.

Any Order Templates configured will be displayed on entering the menu. Clicking on any Template will display the configuration.

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Add, Copy or Edit will allow you to Create or Modify an Order Template as required.

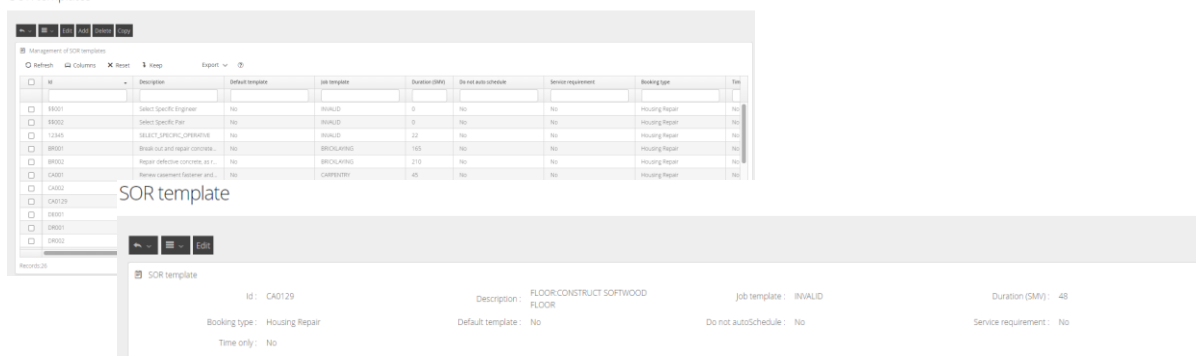
## Delete

Delete will remove the selected Object. This action is not reversible.

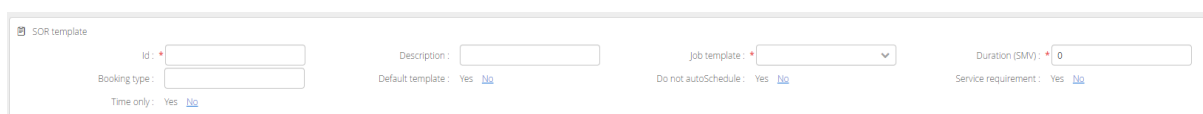
## SOR

SOR's can now be managed individually via the SOR menu. Bulk additions can still be made via the Import/Export routine. When accessing the SOR Menu, all of your currently configured SOR's will be displayed. Clicking on any configured item will display the detail associated with that entry.

SOR templates



Clicking Edit will allow you to modify an existing entry. Clicking Add will allow you to create a new entry. In both cases, you will be presented with the following window. Some of your options may be pre-populated.



Enter your values as required.

- ID should be your SOR from your upstream Housing or Integrated system.
- The Description has a maximum length of 250 characters.
- Booking Type should always be 'Housing Repair' if you are using the BookingHub, otherwise, this can be any value.

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Once complete, click Save to commit your changes.

### Delete

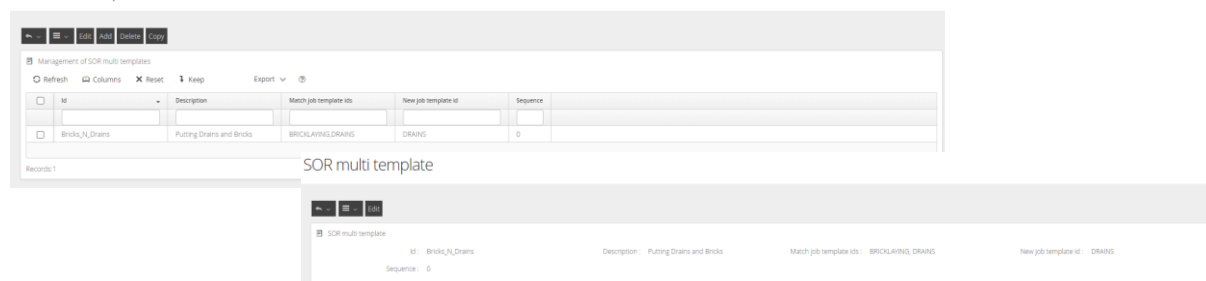
Delete will remove the selected Object. This action is not reversible.

### SOR Multi

Mutli Template mapping in DRS V6 works in the same manner as v5.7, though the screens have been given a refresh to match the V6 styling.

Clicking into this menu will display the currently configured MultiTemplates. Clicking on any listed option will display the configured details.

SOR multi templates



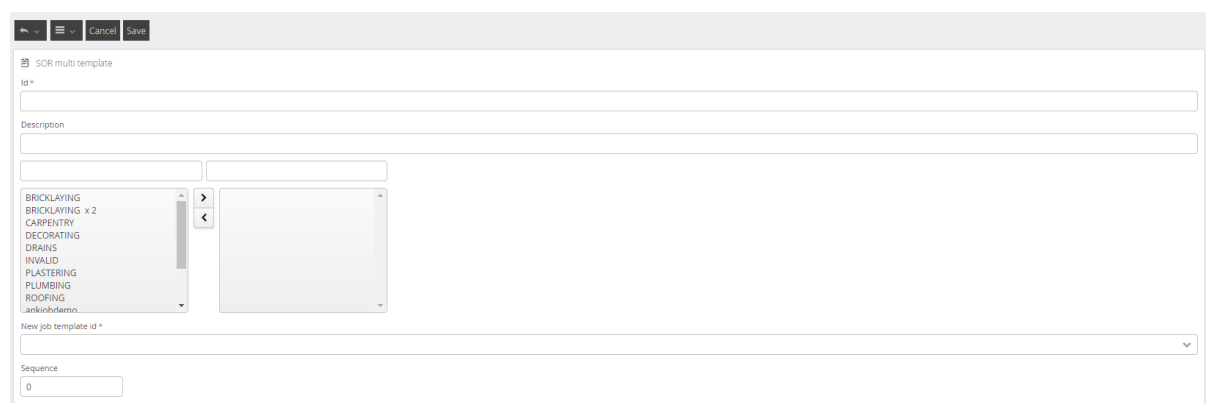
ID	Description	Match job template ids	New job template id	Sequence
Bricks_N_Drains	Putting Drains and Bricks	BRICKLAYING, DRAINS	DRAINS	0

SOR multi template

ID: Bricks\_N\_Drains Description: Putting Drains and Bricks Match job template ids: BRICKLAYING, DRAINS New job template id: DRAINS Sequence: 0

Add and Copy will allow you to create a new Multi Template mapping, Edit will allow you to modify an existing template configuration.

In all cases, the following screen will be displayed. Some of your fields may be pre-populated.



SOR multi template

ID \*

Description

Match job template ids

New job template id \*

Sequence

- ID should be unique and must contain no spaces.
- Description will be the displayed value to the user.
- The combination of Templates can be selected using the selection boxes.
- The resulting template of the combination can be selected from the dropdown.

- The Sequence number will dictate the order in which the combinations are assessed. Best practice would be to have the largest combinations of templates to have the lowest sequence. The Sequence value must be unique.

Once you have completed your changes, click Save.

### Delete

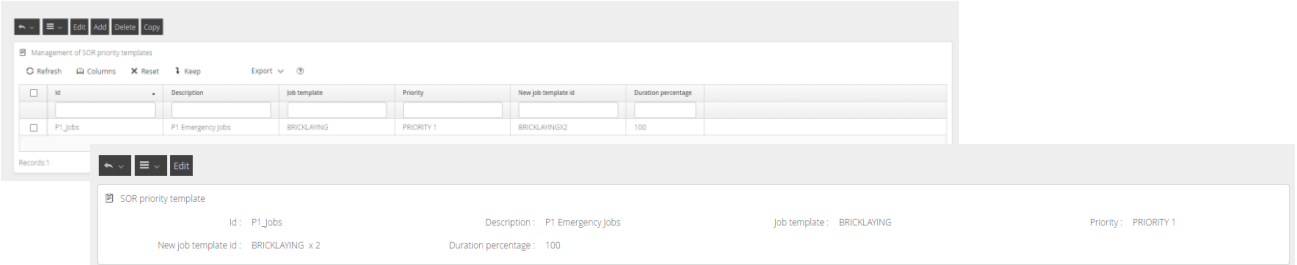
Delete will remove the selected Object. This action is not reversible.

### SOR Priority

Priority Template mapping in DRS V6 works in the same manner as v5.7, though the screens have been given a refresh to match the V6 styling.

Clicking into this menu will display the currently configured Priority Template. Clicking on any listed option will display the configured details.

SOR priority templates



Id	Description	Job template	Priority	New job template id	Duration percentage
P1_Jobs	P1 Emergency jobs	BRICKLAYING	PRIORITY 1	BRICKLAYINGX2	100

Records: 1

SOR priority template

Id: P1\_Jobs      Description: P1 Emergency jobs      Job template: BRICKLAYING      Priority: PRIORITY 1

New job template id: BRICKLAYING x 2      Duration percentage: 100

Add or Copy will allow you to create a new Priority Template. Edit will allow you to modify an existing Priority Template.

In both cases, the following screen will be displayed. Some of your fields may be pre-populated.

SOR priority template



SOR priority template

Id:       Description:       Job template:       Priority:

New job template id:       Duration percentage:

- ID should be unique and must contain no spaces.
- Description will be the displayed value to the user.
- New Job Template ID will be the resulting Job Template

Once you have completed your changes, click Save.

### Delete

Delete will remove the selected Object. This action is not reversible.

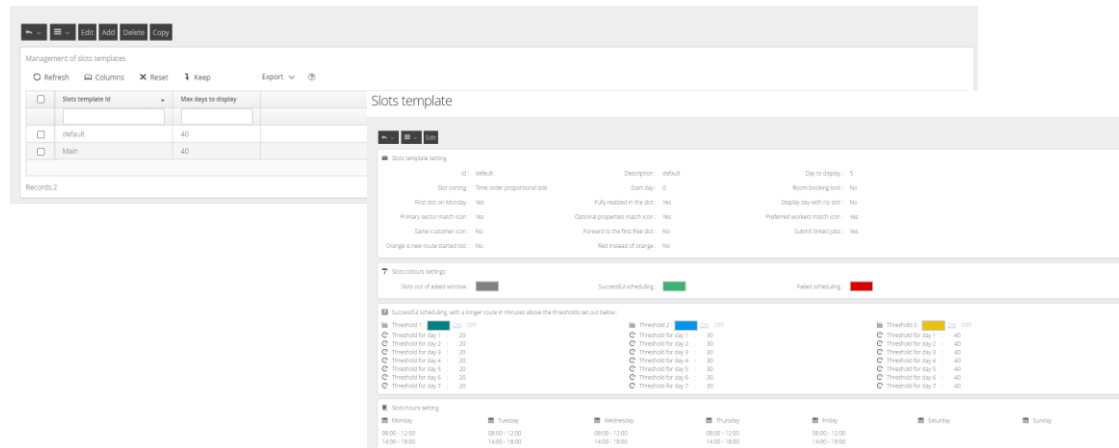
## Slot Templates

Configuration of Slot Templates has undergone a redesign in line with the redesign of V6, however, their major function remains the same.

Clicking on this menu item will display the currently configured Slot Templates. Clicking on an individual slot template will display the configuration of that template.

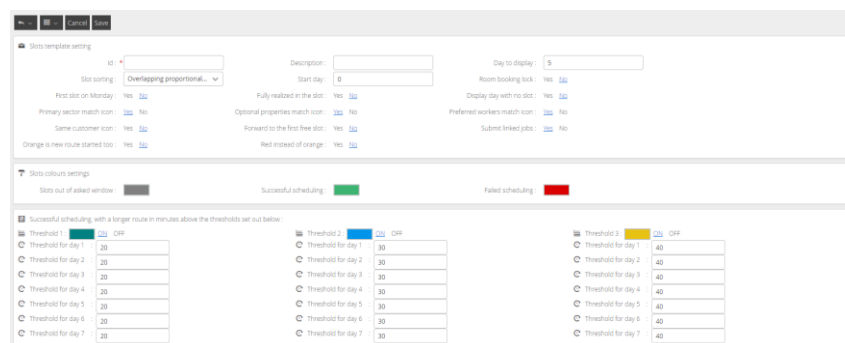
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Slots templates



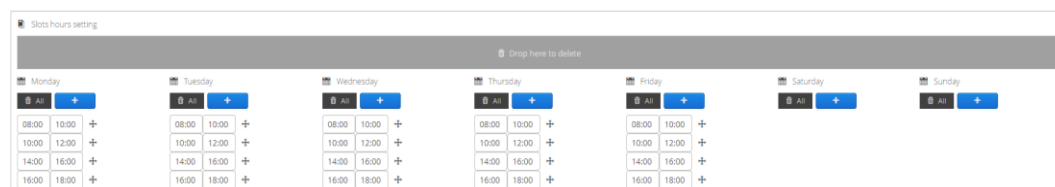
Add or Copy will create a new Slot Template for you to configure. Edit will allow you to modify an existing Slot Template.

In all cases, a screen similar to the following will be shown.



Options to configure for the Slot template are as previous versions.

Notably, the Time Slots are configured left to right, rather than Top to Bottom.



When your changes are complete, click Save.

### Delete

Delete will remove the selected Object. This action is not reversible.



## Text Message

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

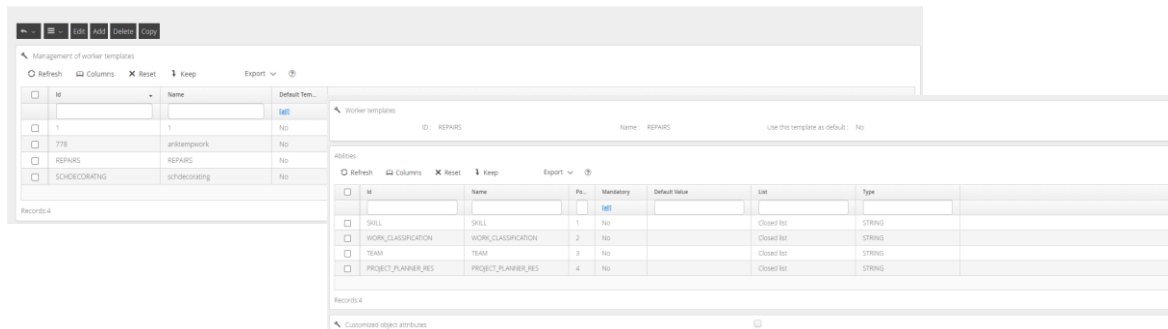
## Worker

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Worker Templates work in the same way as previous versions but have undergone new styling in line with the redesign of V6.

Clicking on the Worker Template will display all currently configured templates. Clicking on any individual template will display the configuration.

Worker templates



The screenshot displays the 'Management of worker templates' interface. On the left, a table lists existing templates:

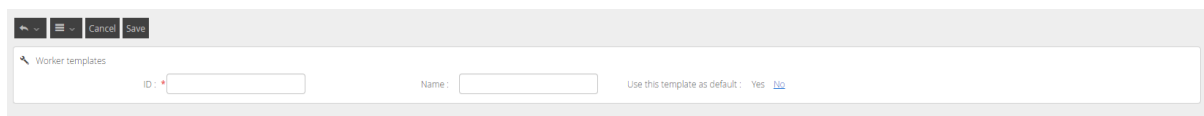
ID	Name	Default Tem...
1	1	No
778	anlcompwork	No
REPAIRS	REPAIRS	No
SCHDECORATING	schdecorating	No

On the right, the configuration for the 'REPAIRS' template is shown. It includes fields for ID, Name, and a checkbox for 'Use this template as default:'. Below this is a table of abilities:

ID	Name	Pr...	Mandatory	Default Value	List	Type
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

## Add/Copy

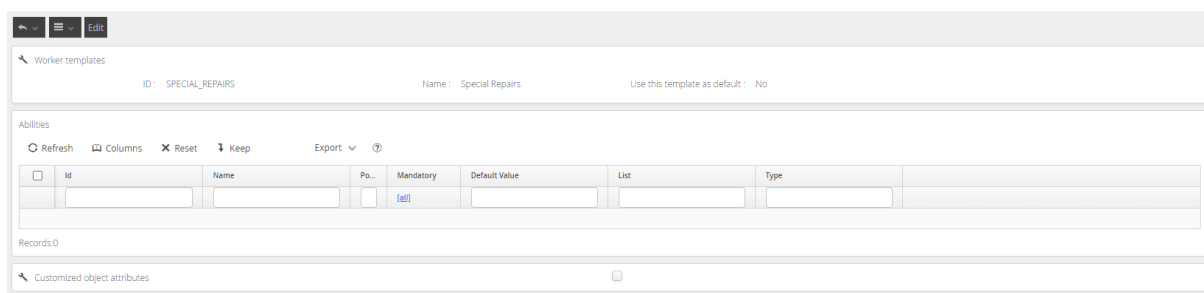
Add or Copy will allow you to create new Worker Template. On selection the following screen will be displayed.



The screenshot shows the 'Worker templates' form with input fields for ID, Name, and a checkbox for 'Use this template as default:'. The ID field contains '1', the Name field contains 'Special Repairs', and the checkbox is unchecked.

- The ID value must be unique and should not contain spaces.
- The Name is a descriptive field for your Template.

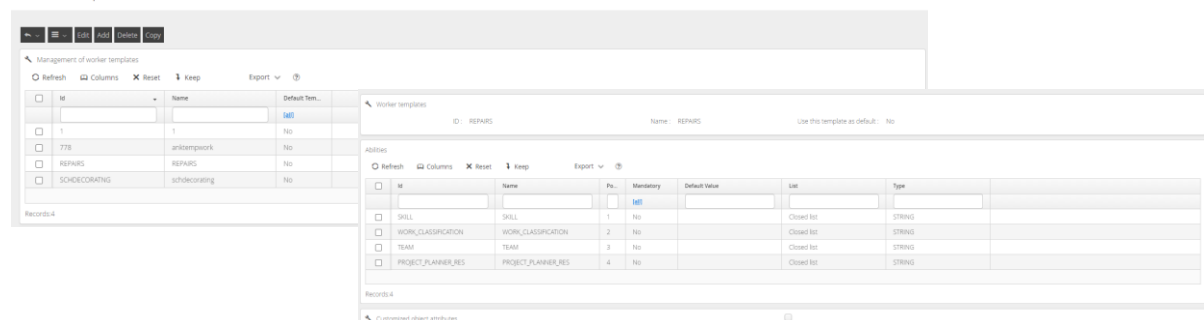
Once complete, click Save. The following screen will be displayed.



The screenshot shows the 'Worker templates' configuration screen. The 'ID' field is 'SPECIAL\_REPAIRS' and the 'Name' is 'Special Repairs'. Below this is a table of abilities:

ID	Name	Pr...	Mandatory	Default Value	List	Type
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

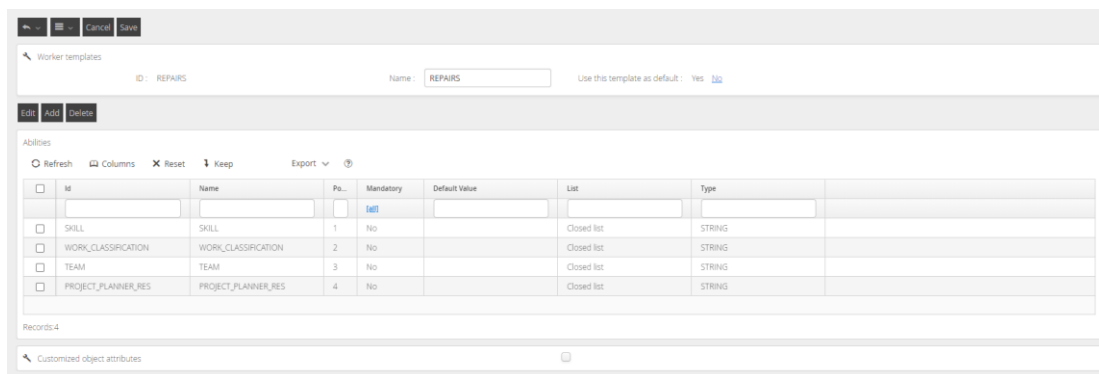
Worker templates



The screenshot shows the 'Management of worker templates' interface. The table of existing templates now includes the newly added 'SPECIAL\_REPAIRS' template:

ID	Name	Default Tem...
1	1	No
778	anlcompwork	No
REPAIRS	REPAIRS	No
SCHDECORATING	schdecorating	No
SPECIAL_REPAIRS	SPECIAL_REPAIRS	No

Selecting Edit will display this screen.



Worker templates

ID: REPAIRS Name: REPAIRS Use this template as default: Yes [No](#)

[Edit](#) [Add](#) [Delete](#)

Abilities

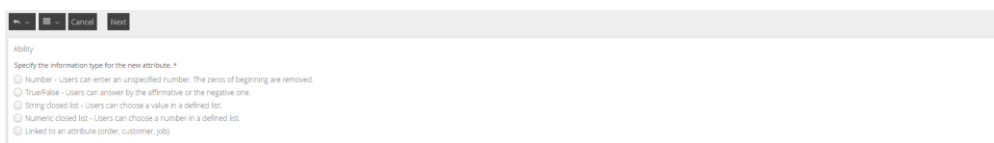
[Refresh](#) [Columns](#) [Reset](#) [Keep](#) Export [v](#) [i](#)

<input type="checkbox"/>	ID	Name	Pos.	Mandatory	Default Value	List	Type
<input type="checkbox"/>	SKILL	SKILL	1	No		Closed list	STRING
<input type="checkbox"/>	WORK_CLASSIFICATION	WORK_CLASSIFICATION	2	No		Closed list	STRING
<input type="checkbox"/>	TEAM	TEAM	3	No		Closed list	STRING
<input type="checkbox"/>	PROJECT_PLANNER_RES	PROJECT_PLANNER_RES	4	No		Closed list	STRING

Records: 4

Customized object attributes

From this screen you can add in abilities to provide scheduling constraints. Add will allow you to add a new ability. Select the Ability Type and click Next.

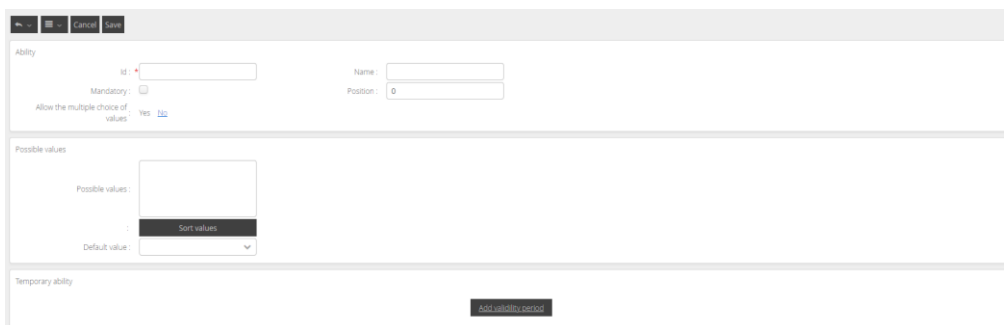


Ability

Specify the information type for the new attribute.

- ☐ Number - Users can enter an unspecified number. The zeros of beginning are removed.
- ☐ True/False - Users can answer by the affirmative or the negative one.
- ☐ String closed list - Users can choose a value in a defined list.
- ☐ Numeric closed list - Users can choose a number in a defined list.
- ☐ Linked to an attribute (order, customer, jobs).

Your available options will be different depending on the object type selected.



Ability

ID:  Name:

Mandatory: ☐ Position:

Allow the multiple choice of values: Yes [No](#)

Possible values

Possible values:

Sort values

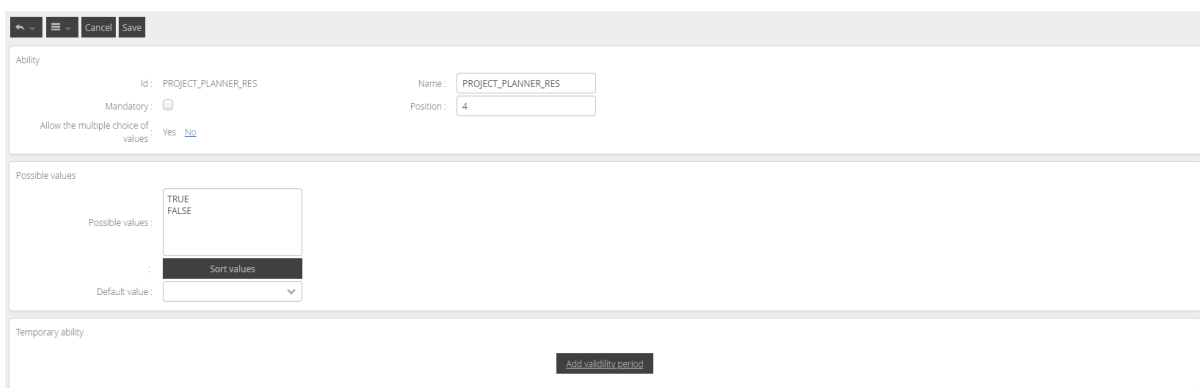
Default value:

Temporary ability

[Add validity period](#)

If your ability is temporary or should only apply during specific times during the day, add a Variability Period by clicking [Add validity period](#). Complete the detail as required by your Object Type and click Save. More detail on this function can be found in the Variabilities section of this document.

Edit will allow you to modify an existing ability.



Ability

ID: PROJECT\_PLANNER\_RES Name: PROJECT\_PLANNER\_RES

Mandatory: ☐ Position: 4

Allow the multiple choice of values: Yes [No](#)

Possible values

Possible values: TRUE FALSE

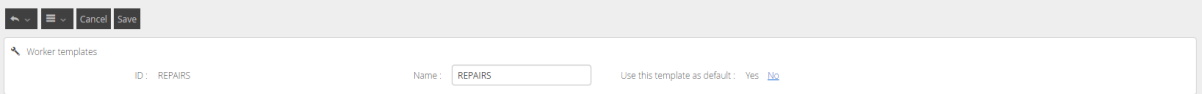
Sort values

Default value:

Temporary ability

[Add validity period](#)

Complete your modifications and click Save.



Ensure you Save the Worker Template once modifications are complete.

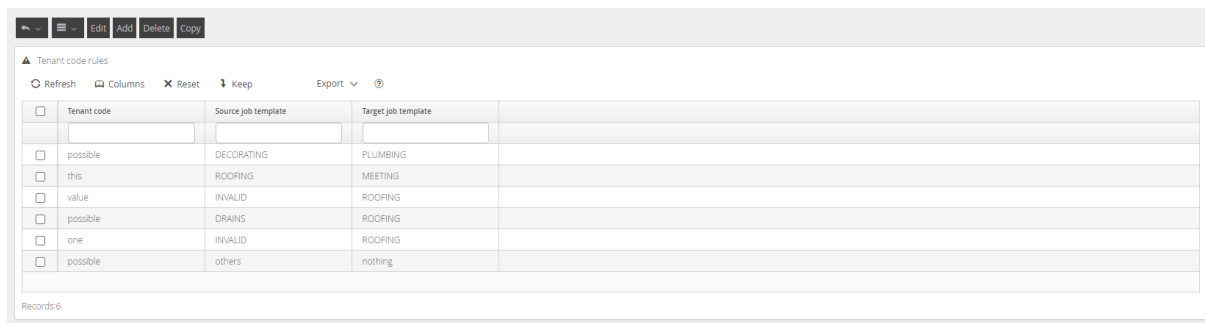
### Delete

In all cases, delete will remove the selected Object. This action is not reversible.

## Tenant Code Rules

Tenant Code rules have undergone a change in styling, but the functionality remains the same.

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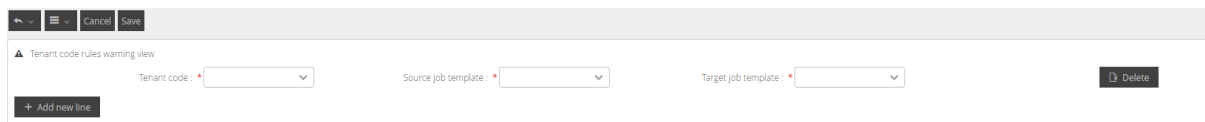


The screenshot shows a table titled "Tenant code rules" with columns: Tenant code, Source job template, and Target job template. The table contains 6 records. Above the table are buttons: Refresh, Columns, Reset, Keep, and Export. Below the table, it says "Records: 6".

Tenant code	Source job template	Target job template
possible	DECORATING	PLUMBING
this	ROOFING	MEETING
value	INVALID	ROOFING
possible	DRAINS	ROOFING
one	INVALID	ROOFING
possible	others	nothing

## Add/Copy

Add and Copy will allow you to Create or Modify an entry. In both cases, the following screen will be displayed.

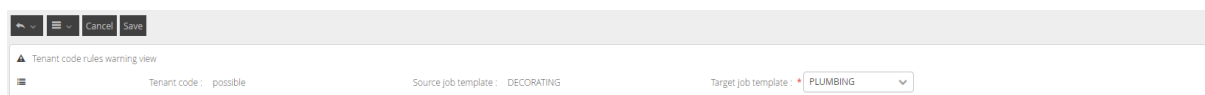


The screenshot shows a form titled "Tenant code rules warning view". It has three dropdown menus: "Tenant code", "Source job template", and "Target job template". There is a "Delete" button on the right and an "Add new line" button on the left.

Use the Tenant Code, Source Job Template and Target Job Template to select your appropriate values. Use the Add New Line button to add multiple values on the same change. Remove any added line with the Delete button. Once complete, click Save.

## Edit

When editing a Tenant Code Rule, the only available value to edit will be the Target Job Template.



The screenshot shows the same form as before, but with the "Tenant code" dropdown set to "possible", the "Source job template" dropdown set to "DECORATING", and the "Target job template" dropdown set to "PLUMBING".

If you need to update the other values, you will need to remove and recreate the line.

## Delete

Delete will remove the selected Object. This action is not reversible.

## Text Message Parameters

No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

## Unavailability Reasons

Unavailability Reasons provide the same function as previous versions but are configured in the same fashion as other redesigned screens.

The top menu will display your currently configured options. Clicking into them will display the individual configured detail.

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### Unavailability reasons

Unavailability reasons			
<div> <span>Refresh</span> <span>Columns</span> <span>Reset</span> <span>Keep</span> <span>Export</span> <span>?</span> </div>			
<input type="checkbox"/>	Id	Description	
<input type="checkbox"/>			
<input type="checkbox"/>	Special Duties	Special Duties	
<input type="checkbox"/>	Sickness	Sickness	
<input type="checkbox"/>	Team Meeting	Team Meeting	
<input type="checkbox"/>	Assigned To Voids	Assigned To Voids	
<input type="checkbox"/>	Vehicle Maintenance	Vehicle Maintenance	
<input type="checkbox"/>	Assigned To Responsive	Assigned To Responsive	
<input type="checkbox"/>	Holiday	Holiday	
<input type="checkbox"/>	Training	Training	
<input type="checkbox"/>	Emergency Reserve	Emergency Reserve	
<input type="checkbox"/>	Rest Time	Rest Time	
<input type="checkbox"/>	Medical Appointment	Medical Appointment	
<input type="checkbox"/>	Bank Holiday	Bank Holiday	
Records: 12			

### Unavailability reason

Refresh
Columns
Edit

Unavailability reason

Name : Sickness
Description : Sickness

## Edit/Add/Copy

Edit, Add or Copy will allow you to Modify or Create an entry within this list. In all cases, you will be offered these options

Refresh
Columns
Cancel
Save

Unavailability reason

Name : \* Sickness
Description : Sickness

Complete the required fields and click Save.

## Delete

Delete will remove the selected Object. This action is not reversible.

User and Profile management is now accessed under this menu. Clicking on either option will display the current configured options

Users and profiles ...
 Profiles
 Users

### Profiles

Refresh Columns Reset Keep Export ?

	Id	Name	
<input type="checkbox"/>			
<input type="checkbox"/>	Administrator	To be used for administrators	
<input type="checkbox"/>	Call Centre	Call Centre	
<input type="checkbox"/>	Jump	Jump	
<input type="checkbox"/>	KT	KT	
<input type="checkbox"/>	Planner	Planner	
<input type="checkbox"/>	Read Only	Read Only	
<input type="checkbox"/>	Reduced	Reduced	
<input type="checkbox"/>	RO2	RO2	
<input type="checkbox"/>	Role1	Test Profile for test role	
<input type="checkbox"/>	Test		
<input type="checkbox"/>	User		

Records:11

### Users

Refresh Columns Reset Keep Export ? Change password

	Login	Username	Profile	External authentication	Disabled	
<input type="checkbox"/>					<a href="#">test</a>	
<input type="checkbox"/>	admin@localhost	admin	Administrator		No	
<input type="checkbox"/>	admin@test	M. Admin	Administrator		No	
<input type="checkbox"/>	alexander.oscroft@oneadvanc...	Alexander Oscroft	Administrator		No	
<input type="checkbox"/>	andrew.cliffe@oneadvanced.c...	Andrew Cliffe	Administrator		No	
<input type="checkbox"/>	andrew.dotto@oneadvanced.c...	Andrew Dotto	Administrator		No	
<input type="checkbox"/>	andrew.stokes@oneadvanced...	Andrew Stokes	Administrator		No	
<input type="checkbox"/>	angela@test	Angela	Administrator		No	
<input type="checkbox"/>	ankit.avade@oneadvanced.com	Ankit Avade	Administrator		No	
<input type="checkbox"/>	archie@test	Archie	Administrator		No	
<input type="checkbox"/>	ashley.kaye@oneadvanced.com	Ashley Kaye	Administrator		No	
<input type="checkbox"/>	bart.white@test	Bart White	Administrator		No	
<input type="checkbox"/>	bastien.cataldo@oneadvance...	Bastien Cataldo	Administrator		No	

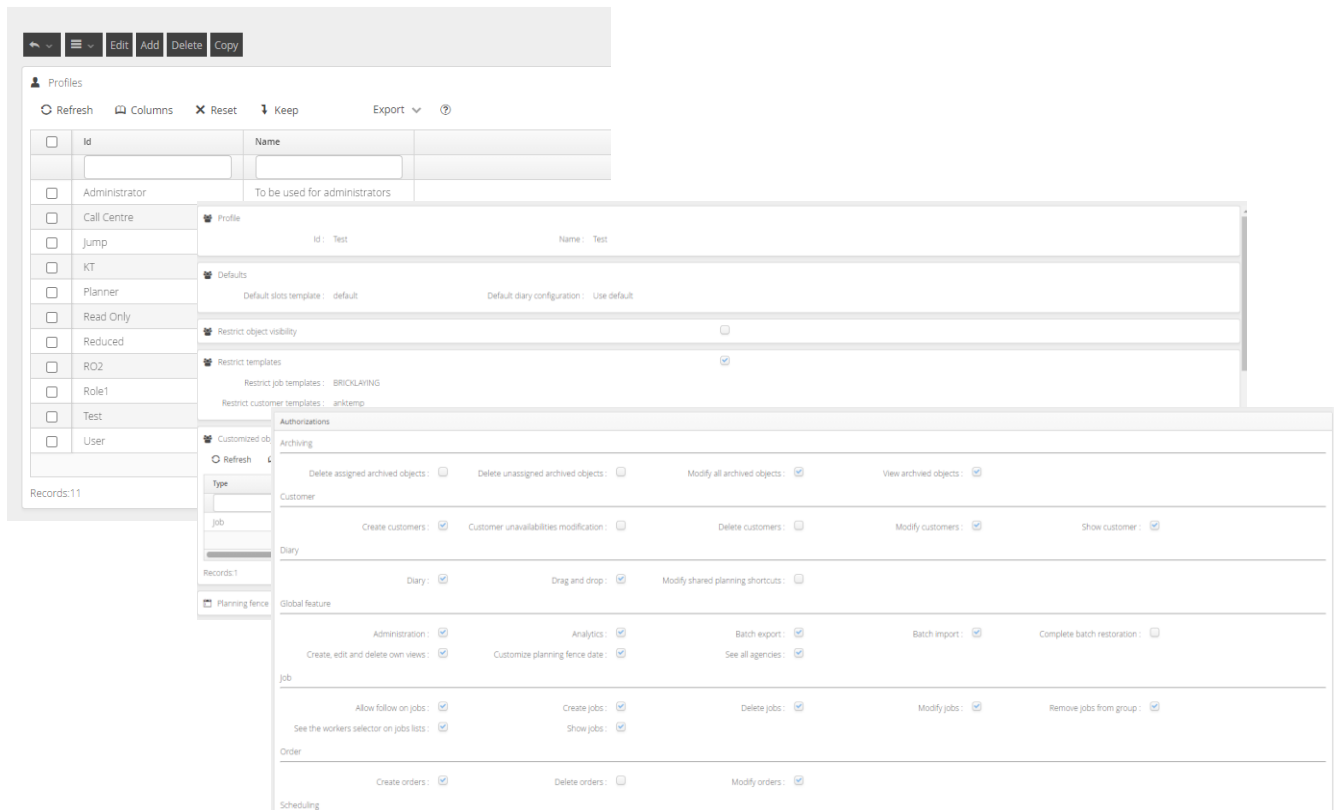
Records:60

## Profiles

From within the Profile Menu, clicking on any value will display the configured options for that profile.

Profiles

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The screenshot shows the 'Profiles' management interface. On the left, there is a list of profiles: Administrator, Call Centre, Jump, KT, Planner, Read Only, Reduced, RO2, Role1, Test, and User. The main area displays the configuration for the 'Test' profile. The configuration includes fields for 'Id' (Test) and 'Name' (Test). Below these are sections for 'Defaults', 'Restrict object visibility', 'Restrict templates', 'Authorizations', and 'Global features'. The 'Defaults' section includes 'Default slots template' (default) and 'Default diary configuration' (Use default). The 'Restrict templates' section includes 'Restrict job templates' (BRICKLAYING) and 'Restrict customer templates' (anktemp). The 'Authorizations' section includes 'Archiving' (Delete assigned archived objects, Delete unassigned archived objects, Modify all archived objects, View archived objects) and 'Customer' (Create customers, Customer unavailabilities modification, Delete customers, Modify customers, Show customer). The 'Global features' section includes 'Administration' (Create, edit and delete own views), 'Analytics' (Customize planning fence date), 'Batch export' (See all agencies), 'Batch import' (Complete batch restoration), 'Job' (Allow follow on jobs, Create jobs, Delete jobs, Modify jobs, Remove jobs from group), 'Order' (Create orders, Delete orders, Modify orders), and 'Scheduling'.

## Add/Copy/Edit

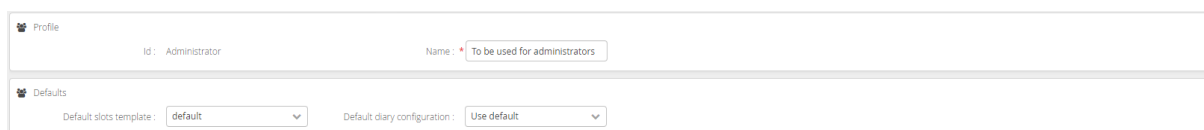
Add, Copy or Edit will allow you to Create or Modify a profile that has been configured. Modifying an existing profile will change the permissions set on this profile for all users assigned after the next login.

## Profile Inheritance

Profile permissions can be overwritten by values set within Screens & Features. Permissions within Screens & Features can be overwritten by the dedicated Support feature available to Advanced Support. Disabling the option at any level above Profiles will limit the ability to select that option on the Profile itself. To find out more about Inheritance in DRS v6, refer to the Object Inheritance section of this document.

## Profiles and Defaults

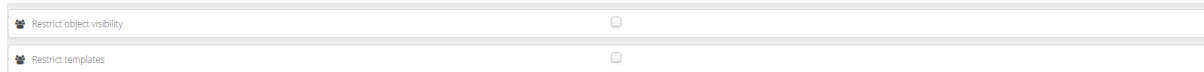
Set an ID and Label for your profile. Set the default slot template and Diary defaults.



The screenshot shows the 'Profile' configuration form. It has fields for 'Id' (Administrator) and 'Name' (To be used for administrators). Below these are sections for 'Defaults', including 'Default slots template' (default) and 'Default diary configuration' (Use default).

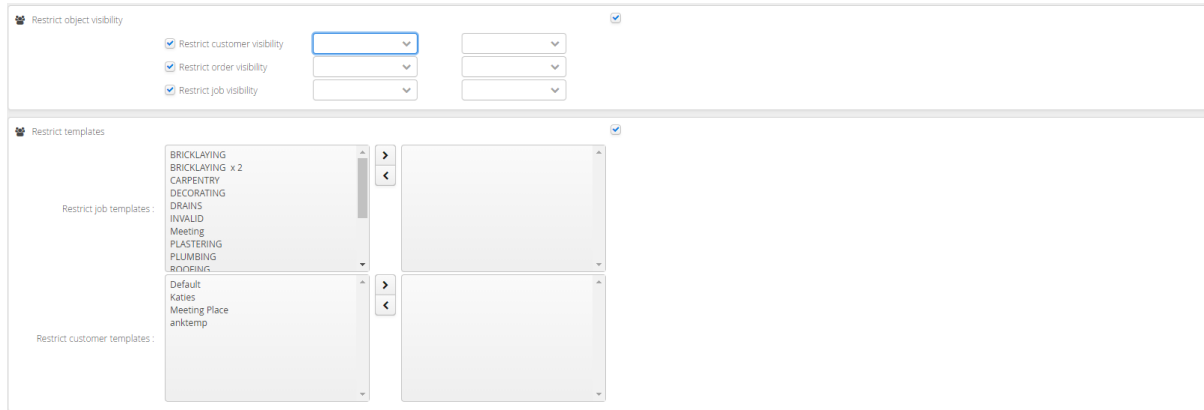
## Object Restrictions and Visibility

Profiles can be set to only see data based on specifically selected objects.



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To enable this function, you must first mark the Checkbox in the respective options to display the window.



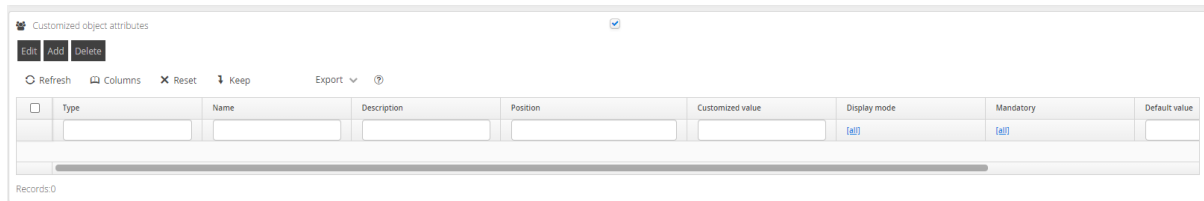
After enabled, selecting any object for restriction will limit the return in Views and Access to those which are selected.

## Customized Object Attributes

Object inheritance, default values and settings can be configured specifically at Profile level.

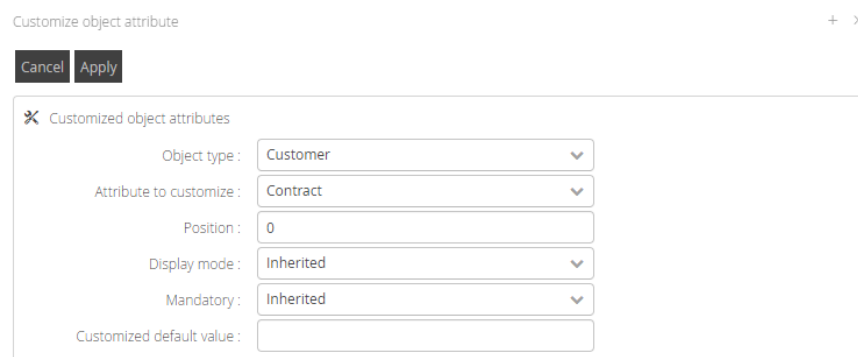


To enable this function, first check the box to display the function.



Object Attributes also follow an inheritance rule. To learn more about this in DRS v6, refer to the Object Inheritance section of this document.

To Add or Edit objects, click the Add or Edit button. In both cases, the following screen will be displayed. Your actual display may vary.





The settings will now be displayed within this section. Selecting any given object and selecting Delete will remove the selected objects. This action is not reversible.

The Planning Fence Date will allow you to set a customized planning fence for any User assigned.

To enable the function, first check the enable box.

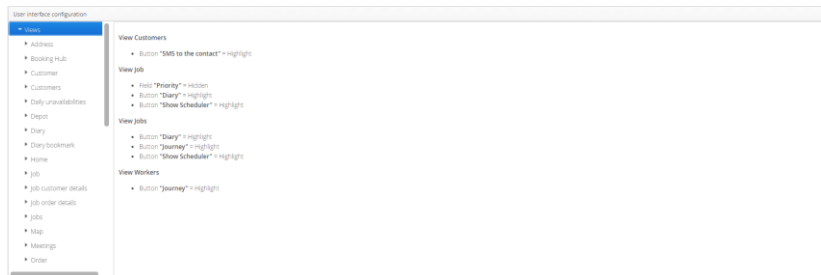
Set your values as needed.

Access to functions and the ability to complete tasks within DRS is managed throughout the Authorizations section.

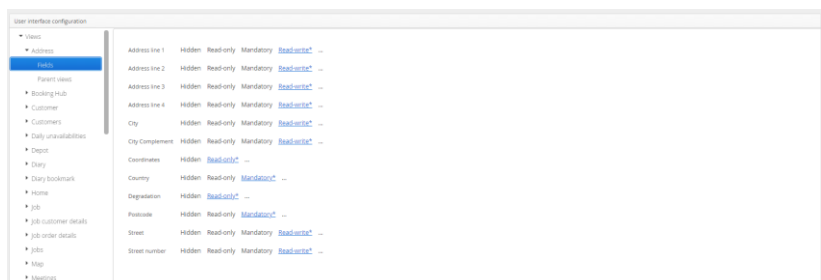
## User Interface Configuration

The User Interface Configuration section allows you to set specific visibility and access on Fields and Buttons. This is an improvement on the Masking ability available within 5.7

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While the Profile is in Edit mode, selecting any sub menu within this window will display the options available for manipulation.



Changing the values within these options will commit the changes to all Users assigned to the profile after the User logs out and logs back in again.

**NOTE:** You can set MANDATORY fields as HIDDEN using this function. If no default value is provided for this field, it may result in users not being able to complete tasks due to MANDATORY fields being left blank. Caution should be used in configuring this function.

## Delete

Delete will remove the selected Object. This action is not reversible.

Clicking on any User will display the configured details.

Add, Edit or Copy will allow you to Create or Modify a User. In all cases, you will be taken to the following screen. Some fields may be pre-populated.

All fields function as per previous versions of DRS and can be amended here.

To limit access to use agencies, first enable the checkbox.

Moving Agencies to the right will allow access only to those specific agencies. If the checkbox is left disabled, the user will retain access to all Agencies.

## Changing Passwords

To change a password for a user, select the user and then click the button.

Change password

Change password + ×

Cancel

Update

Password

\*\*\*\*\*

Confirm password

Change the password and click Update. The Password and Confirm Password must match.

## Delete

Delete will remove the selected Object. This action is not reversible.

## Vocabulary

The Vocabulary menu allows you to reconfigure the Left Menu and Header labels.

Vocabulary

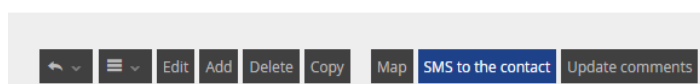
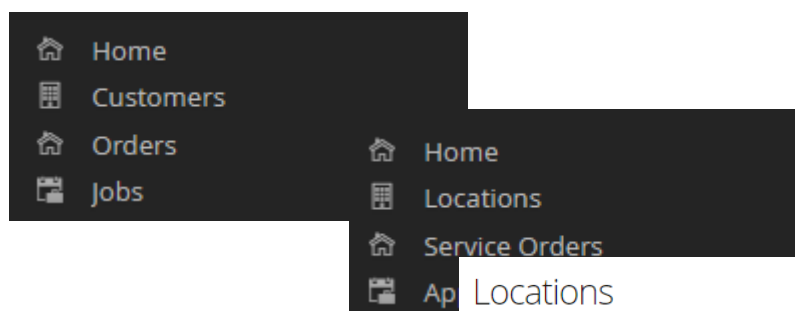
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Description	Default singular	Customized singular	Default plural	Customized plural
[ability] business object name	ability		abilities	
[calendar] business object name	calendar		calendars	
[call centre] business object name	call centre		call centres	
[customer] business object name	customer		customers	customers
[daily schedule type] business object name	daily schedule type		daily schedule types	
[depot] business object name	depot		depots	
[job] business object name	job		jobs	
[meeting] business object name	meeting		meetings	
[order] business object name	order		orders	
[agency] business object name	agency		agencies	
[published planning] business object name	published planning		published plannings	
[worker request] business object name	worker request		worker requests	
[sector] business object name	sector		sectors	
[service] business object name	service		services	
[sor] business object name	SOR		SORs	
[tenant code] business object name	tenant code		tenant codes	
[working hours calendar] business object name	working hours calendar		working hours calendars	
[day off calendar] business object name	day off calendar		day off calendars	
[worker] business object name	worker		workers	

Clicking Edit and entering values into the corresponding will modify the Label on the corresponding object.

Vocabulary

Description	Default singular	Customized singular	Default plural	Customized plural
[ability] business object name	ability		abilities	
[calendar] business object name	calendar		calendars	
[call centre] business object name	call centre		call centres	
[customer] business object name	customer	Location	customers	Locations
[daily schedule type] business object name	daily schedule type		daily schedule types	
[depot] business object name	depot		depots	
[job] business object name	job	Appointment	jobs	Appointments
[meeting] business object name	meeting		meetings	
[order] business object name	order	Service Order	orders	Service Orders
[agency] business object name	agency		agencies	
[published planning] business object name	published planning		published plannings	
[worker request] business object name	worker request	Operative	worker requests	Operatives
[sector] business object name	sector		sectors	
[service] business object name	service		services	
[sor] business object name	SOR		SORs	
[tenant code] business object name	tenant code		tenant codes	
[working hours calendar] business object name	working hours calendar		working hours calendars	
[day off calendar] business object name	day off calendar		day off calendars	
[worker] business object name	worker		workers	



## Appendix 1

### DRS 5.7 User Guide

Please see provided Document entitled

DRS 5.7 User Guide\_v1.2.pdf

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## Appendix 2

### Infosuite User Guide

Please see provided Document entitled

Infosuite UserGuide 2021.pdf