



DRS V6 Release Notes

Author: Andrew Dotto
Date: May 2021
Doc Version: 1.0

Advanced Computer Software Group Ltd.

www.oneadvanced.com

Copyright © Advanced Computer Software Group Ltd 2021

This document contains confidential and / or proprietary information. The content must not be disclosed to third parties without the prior written approval of Advanced Computer Software Group Limited or one of its subsidiaries as appropriate (each referred to as "Advanced"). External recipients may only use the information contained in this document for the purposes of evaluation of the information and entering into discussions with Advanced and for no other purpose.

Page | 3

Whilst Advanced endeavours to ensure that the information in this document is correct and has been prepared in good faith, the information is subject to change and no representation or warranty is given as to the accuracy or completeness of the information. Advanced does not accept any responsibility or liability for errors or omissions or any liability arising out of its use by external recipients or other third parties.

No information set out or referred to in this document shall form the basis of any contract with an external recipient. Any external recipient requiring the provision of software and/or services shall be required to enter into an agreement with Advanced detailing the terms applicable to the supply of such software and/or services and acknowledging that it has not relied on or been induced to enter into such an agreement by any representation or warranty, save as expressly set out in such agreement.

The software (if any) described in this document is supplied under licence and may be used or copied only in accordance with the terms of such a licence. Issue of this document does not entitle an external recipient to access or use the software described or to be granted such a licence.

The development of Advanced software is continuous and the published information may not reflect the current status. Any particular release of the software may not contain all of the facilities described in this document and / or may contain facilities not described in this document.

Advanced Computer Software Group Limited is a company registered in England and Wales with registration number 05965280 whose registered office is at Ditton Park, Riding Court Road, Datchet, Berkshire. SL3 9LL.

A full list of its trading subsidiaries is available at www.oneadvanced.com/legal-privacy

Contents

Revision History..... 10

Summary..... 11

Page | 5 **Change History**..... 12

Navigation..... 13

 Getting Around..... 13

 Viewing Data..... 14

 Filtering Views..... 14

 Scrolling vs Pagination..... 14

 Back Button..... 14

 Exporting Views 15

 Object Inheritance..... 15

 Keep..... 15

 Navigation Menu 16

 Home 17

 Change Password..... 17

 Logging Off 18

 Detach..... 18

 Bookmarks 18

 Version..... 19

 Icon 19

 User Auditing 20

Views..... 20

 User Defined Views..... 20

 Configuring Views 21

 Shared Views..... 21

 Adding and Editing Views 22

 Setting the Detail 22

 Setting the Profile Security..... 22

 Setting the Columns 23

 Column sorting..... 24

 Column reorganization..... 24

 View Editor..... 24

 Managing Visible Columns 25

 Available Columns 25

 Forbidden Columns 25

 Sorting 26

Filters	26
Filtering Operators	26
Advanced Filtering	27
Default Management.....	28
Saving your Filter.....	28
Customers	29
Add/Edit/Copy	30
Delete.....	30
Orders	31
Add/Copy/Edit	31
Delete.....	32
Jobs.....	33
Edit.....	33
Add.....	34
Copy.....	34
Delete.....	34
Sectors.....	34
Change Template	35
Closest.....	35
Diary.....	36
Follow On.....	36
Journey	37
Lock	37
Manual Assignment.....	37
Possible Workers	39
Reassign	40
Schedule Now.....	41
Show Scheduler.....	42
Suspend Job	42
Update Comments	42
Update Contact Details	42
Update Job Status	42
User Queue.....	42
Workers.....	43
Add.....	43
Edit.....	43
Editing Sectors.....	44
Editing Abilities	44

Setting Variabilities	45
Copy.....	46
Delete.....	46
Job List.....	46
Working Hours Calendar.....	46
Add a Calendar.....	46
Edit a Calendar	47
Unavailabilities	48
Other Functions	48
Daily Unavailabilities.....	48
Diary	48
Journey	48
Reports	49
Sectors.....	49
Set Planning Fence	50
Meeting.....	51
Add.....	51
Copy.....	52
Edit.....	53
Delete.....	53
Diaries	54
Gaant.....	54
Map.....	55
Enable Persistence	55
Reset.....	55
Zoom to Content	56
Using Maps from the Object Screens.....	56
Edit Layers	57
History.....	59
Import/Export.....	60
Export Other Objects.....	61
Imports	62
Working Time	63
Day Off Calendar	63
Working Hours Calendar.....	63
Add/Edit/Copy	64
Delete	64
Daily Schedule Types	64

Add/Edit/Copy	65
Delete	65
Configuration.....	66
Agency	67
Add/Edit/Copy	67
Delete	67
Business Data.....	68
Add/Edit/Copy.....	68
Delete	68
Contract Management.....	68
Contract Rename	69
Add/Edit/Copy	69
Delete	69
Customize	70
Depots.....	71
Add/Edit/Copy	71
Delete	71
Diary Bookmarks.....	72
Edit.....	72
Delete	72
External Charts	73
Setting Charts to Anonymous	73
Configuring a Chart.....	75
KPI Settings	76
Add/Edit	76
Delete	76
Screens and Features.....	77
Learning Mode	77
User Interface Configuration	77
Services	78
Auto-Create Follow On	78
Update Worker Location (OOW).....	78
Templates	79
Customer	79
Diary	80
Follow On.....	81
Job	82
Order.....	85

SOR	85
SOR Multi	86
SOR Priority.....	87
Slot Templates	88
Text Message	89
Worker	89
Delete	91
Tenant Code Rules	92
Add/Copy	92
Edit.....	92
Delete	92
Text Message Parameters	92
Unavailability Reasons.....	93
Edit/Add/Copy.....	93
Delete	93
Users and Profiles.....	94
Profiles.....	95
Add/Copy/Edit.....	95
Profile Inheritance.....	95
Profiles and Defaults.....	95
Object Restrictions and Visibility.....	96
Customized Object Attributes	96
Planning Fence Date	97
Authorizations	97
User Interface Configuration.....	98
Delete	98
USERS.....	99
Add/Edit/Copy.....	99
Changing Passwords.....	99
Delete	99
Vocabulary	100
Appendix 1	101
DRS 5.7 User Guide	101
Appendix 2	101
Infosuite User Guide	101

Revision History

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.

Page | 11 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.

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.

Page | 13

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

Page | 14

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.

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.

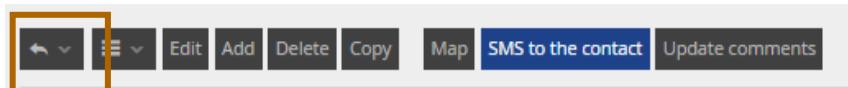
You can refresh your selection at any time by clicking the refresh icon.

Scrolling vs Pagination

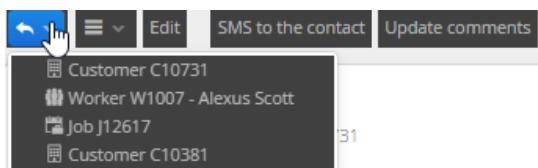
Access to the data not seen on a single screen is now controlled by scroll bars on the right side of the various data tables. There is no pagination in DRS v6. All data returns are limited to 1000 records Maximum but where more detail is available, this can be accessed through filtering or the use of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

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

Back Button

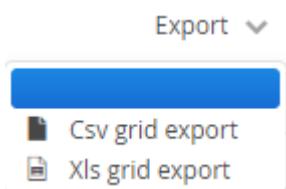


The Back Button can be found on all menus where table data is displayed. You can use this to navigate back through your previous selections. Clicking on the chevron will display the last selected objects. Clicking one will take you to that object.



Exporting View Data

Page | 15



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.

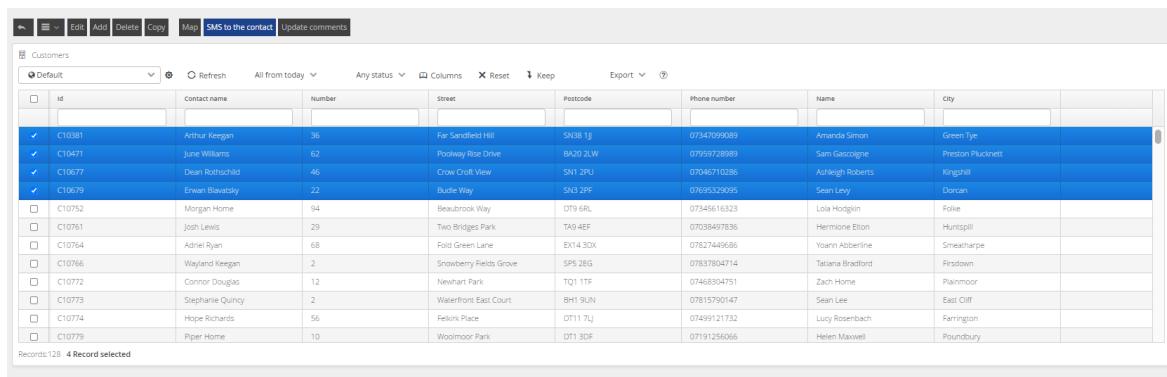
Users > Profile > Template > Object > Global

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.

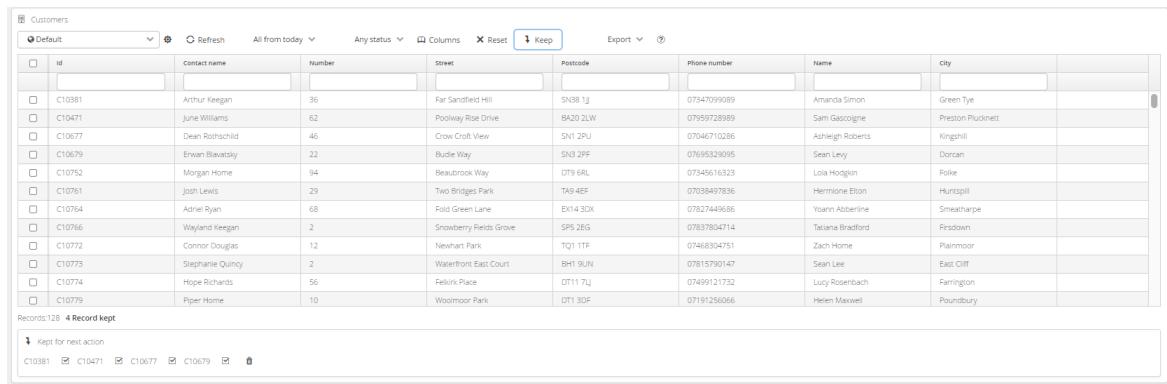
Page | 16



Records:128 4 Record selected

	ID	Contact name	Number	Street	Postcode	Phone number	Name	City
<input type="checkbox"/>	C10381	Arthur Keegan	36	Fair Sandfield Hill	SN38 1J	07347099089	Amanda Simon	Green Tye
<input type="checkbox"/>	C10471	Jane Williams	62	Poolway Rise Drive	BA20 2LW	07959729899	Sam Gascoigne	Preston Plucknett
<input type="checkbox"/>	C10677	Dean Rothschild	46	Crow Croft View	SN1 2PU	07046710286	Ashleigh Roberts	Kinghill
<input type="checkbox"/>	C10679	Erwan Blavatay	22	Budle Way	SN3 2PF	07695329095	Sean Levy	Dorcan
<input type="checkbox"/>	C10752	Morgan Home	94	Beauroak Way	DT9 6RL	07345616323	Lola Hodgkin	Folke
<input type="checkbox"/>	C10761	Josh Lewis	29	Two Bridges Park	TA9 4EF	0703497835	Hermione Elton	Hunsplill
<input type="checkbox"/>	C10764	Adriel Ryan	68	Fold Green Lane	EX14 3DX	07827449686	Yoann Abberline	Smearharpe
<input type="checkbox"/>	C10766	Wayland Keegan	2	Snowberry Fields Grove	SP5 2EG	07837804714	Tatiana Bradford	Frodown
<input type="checkbox"/>	C10772	Connor Douglas	12	Newhart Park	TQ1 1TF	07468304751	Zach Horne	Painmooor
<input type="checkbox"/>	C10773	Stephanie Quincy	2	Waterfront East Court	BH1 3UN	07815790147	Sean Lee	East Cliff
<input type="checkbox"/>	C10774	Hope Richards	56	Felkin's Place	DT11 7U	07499121732	Lucy Rosenbach	Ferrington
<input type="checkbox"/>	C10779	Piper Home	10	Woomoor Park	DT1 3DF	07191256066	Helen 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.



Records:128 4 Record kept

Kept for next action

C10381 C10471 C10677 C10679

	ID	Contact name	Number	Street	Postcode	Phone number	Name	City
<input type="checkbox"/>	C10381	Arthur Keegan	36	Fair Sandfield Hill	SN38 1J	07347099089	Amanda Simon	Green Tye
<input type="checkbox"/>	C10471	Jane Williams	62	Poolway Rise Drive	BA20 2LW	07959729899	Sam Gascoigne	Preston Plucknett
<input type="checkbox"/>	C10677	Dean Rothschild	46	Crow Croft View	SN1 2PU	07046710286	Ashleigh Roberts	Kinghill
<input type="checkbox"/>	C10679	Erwan Blavatay	22	Budle Way	SN3 2PF	07695329095	Sean Levy	Dorcan
<input type="checkbox"/>	C10752	Morgan Home	94	Beauroak Way	DT9 6RL	07345616323	Lola Hodgkin	Folke
<input type="checkbox"/>	C10761	Josh Lewis	29	Two Bridges Park	TA9 4EF	0703497835	Hermione Elton	Hunsplill
<input type="checkbox"/>	C10764	Adriel Ryan	68	Fold Green Lane	EX14 3DX	07827449686	Yoann Abberline	Smearharpe
<input type="checkbox"/>	C10766	Wayland Keegan	2	Snowberry Fields Grove	SP5 2EG	07837804714	Tatiana Bradford	Frodown
<input type="checkbox"/>	C10772	Connor Douglas	12	Newhart Park	TQ1 1TF	07468304751	Zach Horne	Painmooor
<input type="checkbox"/>	C10773	Stephanie Quincy	2	Waterfront East Court	BH1 3UN	07815790147	Sean Lee	East Cliff
<input type="checkbox"/>	C10774	Hope Richards	56	Felkin's Place	DT11 7U	07499121732	Lucy Rosenbach	Ferrington
<input type="checkbox"/>	C10779	Piper Home	10	Woomoor Park	DT1 3DF	07191256066	Helen Maxwell	Poundbury

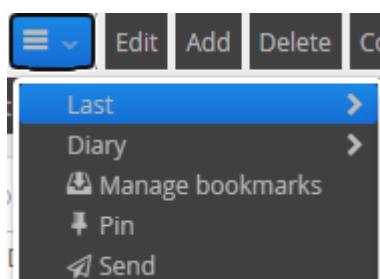
The Keep List can be cleared by clicking the Trash Can or individual items can be removed by clicking on the individual ticks next to the items in the list.

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.

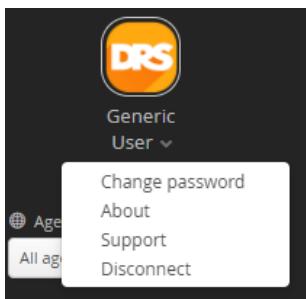
Configuration of this can be found in the **CONFIGURATION** section of this document.

Home



Change Password

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



Once changed, Click Update.



Change password

Cancel **Update**

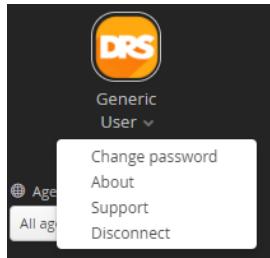
Password: *****

Confirm password: *****

Page | 18

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.

Bookmarks

Close **Delete** **Comment** **Mark as read** **Mark as unread** **Rename** **Send**

Bookmarks

All

Refresh Columns Reset Keep Export ?

<input type="checkbox"/>	Type	Id	Bookmark name	Creation date	Sent from	Attached message
<input type="checkbox"/>	Customer	C10381	Amanda Simon	13/05/2021 13:24		

Records:1

Page | 19

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.

Customize

Agencies

All agencies

- Configuration ...
 - Users and profiles ...
 - Agencies
 - Views ...
 - Depots
 - Business data
 - Templates ...
 - Unavailability reasons
 - Screen & features
 - Map permanent markers
 - Tenant code rules
 - Travel time profiles
- Customize**
- Diary bookmarks
- Contract management
- Contract rename
- Text messages ...
- Services
- KPI settings
- Diary
- Vocabulary

Other

Header text : DRS V6 Advanced World
<https://p0.pikrepo.com/preview/55>
 Small logo : 2/818/person-hands-on-mark-on-sand.jpg

Languages

Default language : English
 Authorized languages : English

User Auditing

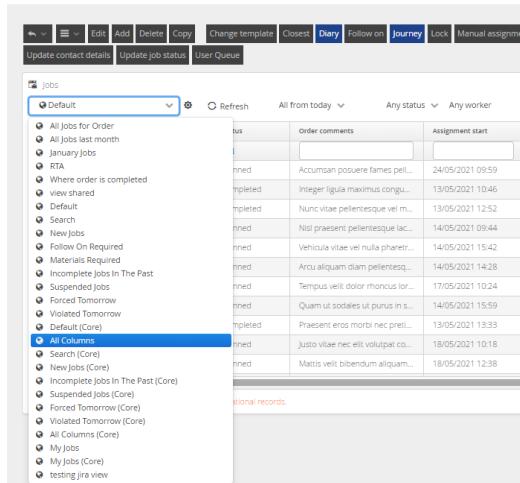
The last user to schedule a task is now logged along with a timestamp of that scheduling within the database.

Page | 20

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



bus	Order comments	Assignment start
rned	Accumant posuere fames pell...	24/05/2021 09:59
mpleted	Integer ligula maximus congu...	13/05/2021 10:46
rned	Nunc vitae pellentesque vel m...	13/05/2021 12:52
rned	Nisi praesent pellentesque lac...	14/05/2021 09:44
rned	Vehicula vitae vel nulla pharetr...	14/05/2021 15:42
rned	Arca aliquam diam pellentesq...	14/05/2021 14:28
rned	Tempus velit dolor morbius lor...	17/05/2021 10:24
rned	Quam ut sodales ut purus in s...	14/05/2021 15:59
mpleted	Praesent eros morbi nec pret...	13/05/2021 13:33
rned	Justo vitae nec elit volutpat co...	18/05/2021 10:18
rned	Mattis velit bibendum aliquam...	18/05/2021 12:38

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

Name: Search view: Yes

Editor

Schedule: Any status Schedule: All from today

Visible columns Available columns Sort Filters

Filter Sort Hide

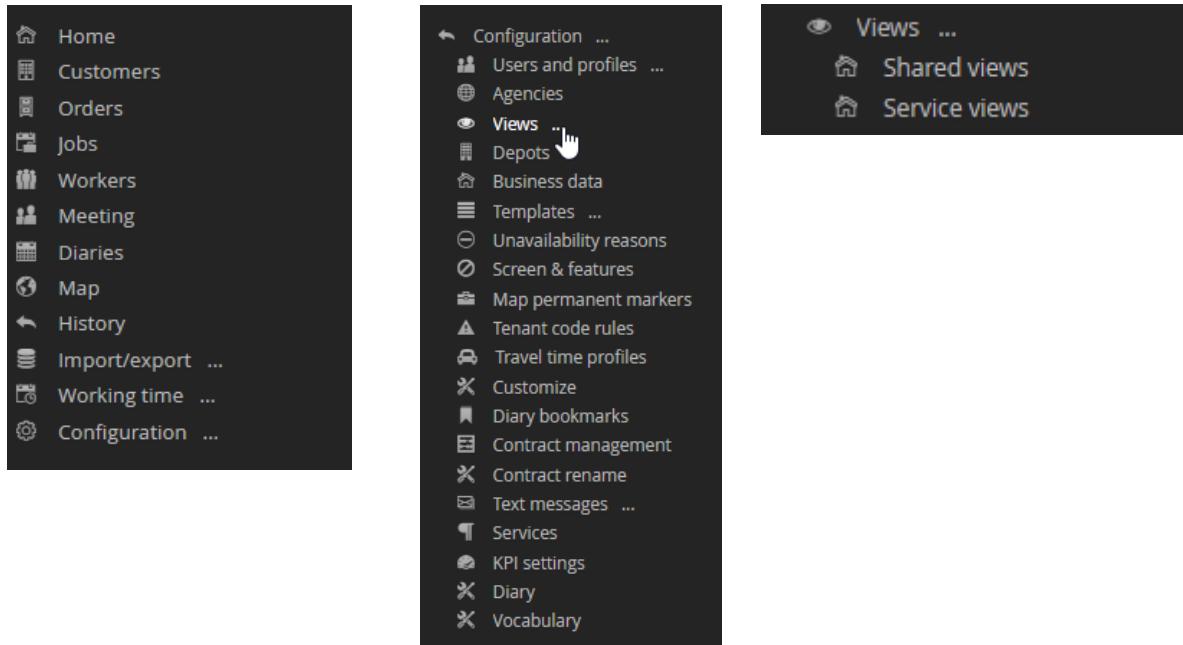
Index	Column	Caption	Size
0	Job - USERID	Id	85
1	ServiceOrder - BO_PRIMARY_ORDER_NUM	Primary order num	141
2	Job - STATUS	Status	115
3	ServiceOrder - BO_ORDER_COMMENTS	Order comments	200
4	Job - CURRENTASSIGNMENT_START	Assignment start	150
5	Job - CURRENTASSIGNMENT_END	Assignment end	150
6	ServiceOrder - BO_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

Page | 21

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.

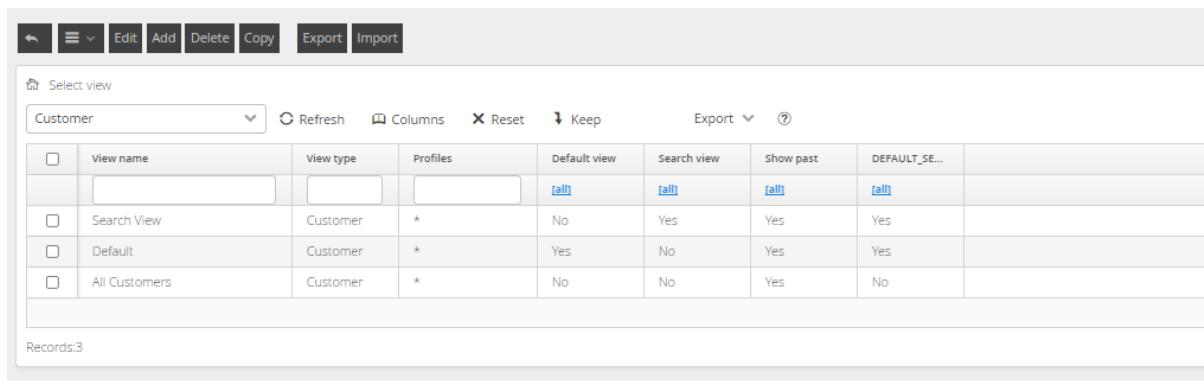


The screenshot shows the 'Configuration' menu structure. The main menu on the left includes Home, Customers, Orders, Jobs, Workers, Meeting, Diaries, Map, History, Import/export, Working time, and Configuration. The 'Views' option in the Configuration menu is highlighted with a mouse cursor, indicating it is the active or selected item. The 'Views' submenu on the right lists Shared views and Service views.

- Configuration ...
- Users and profiles ...
- Agencies
- Views ...**
- Depots
- Business data
- Templates ...
- Unavailability reasons
- Screen & features
- Map permanent markers
- Tenant code rules
- Travel time profiles
- Customize
- Diary bookmarks
- Contract management
- Contract rename
- Text messages ...
- Services
- KPI settings
- Diary
- Vocabulary

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)



The screenshot shows a list of view configurations for 'Customer'. The columns include View name, View type, Profiles, Default view, Search view, Show past, and DEFAULT_SE... . There are four entries:

View name	View type	Profiles	Default view	Search view	Show past	DEFAULT_SE...
Customer			[all]	[all]	[all]	[all]
Search View	Customer	*	No	Yes	Yes	Yes
Default	Customer	*	Yes	No	Yes	Yes
All Customers	Customer	*	No	No	Yes	No

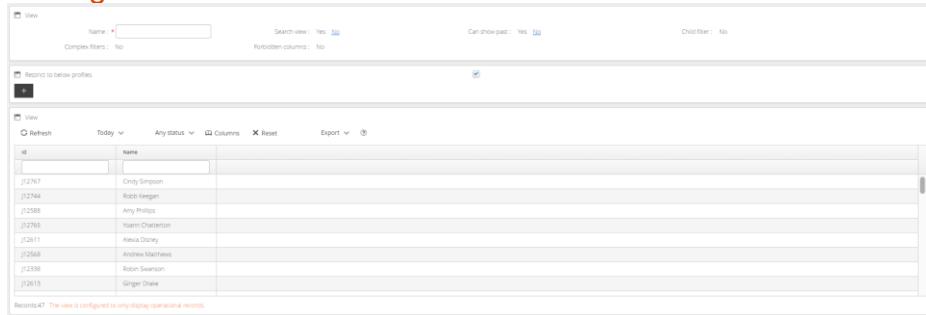
Records:3

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



The screenshot shows the 'Edit View' screen. At the top, there are configuration options: Name (Cindy Simpson), Search view (Yes), Can show past (Yes), and Child filter (No). Below this is a 'Records to below profiles' section with a checkbox. The main area is a table with columns 'id' and 'name', showing records from J2707 to J2815. The table has a header row and 15 data rows.

id	name
J2707	Cindy Simpson
J2744	Robb Neveen
J2580	Amy Phillips
J2785	Yvonne Chastain
J2611	Alexis Disney
J2948	Andrew Macneil
J2358	Robin Swanson
J2615	Ginger Drew

Records:47 The view is configured to only displaying 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.

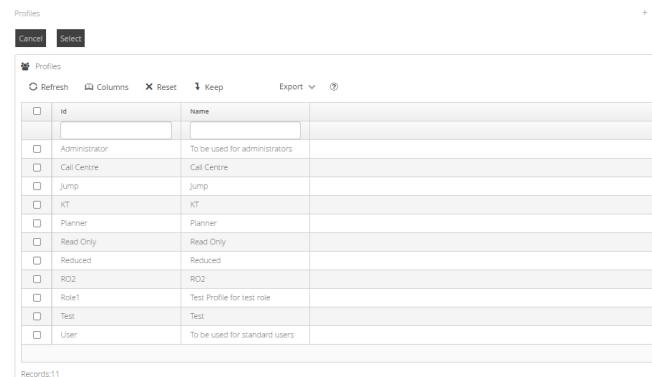
Setting the Profile Security

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.



To add a profile, click the  button.

Page | 23



Profiles

Profiles

Cancel Select

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

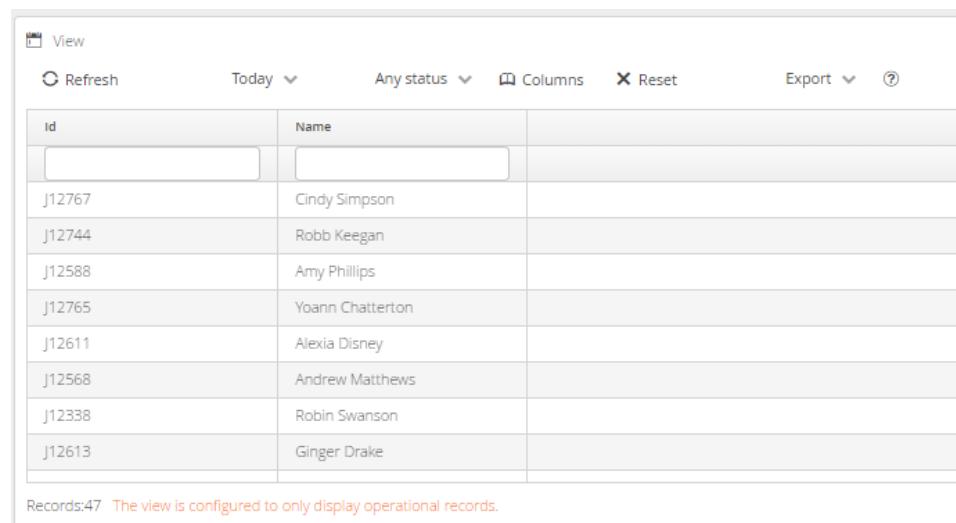
To be used for administrators Call Centre Jump KT Planner



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.

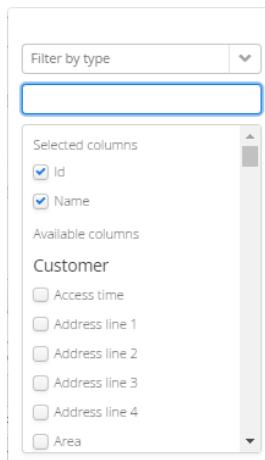


View

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.



The screenshot shows a 'Selected columns' section with checkboxes for 'Id' and 'Name'. The 'Available columns' section lists 'Customer' and several 'Address line' fields (1 through 4), each with a checkbox. A 'Filter by type' dropdown is at the top.

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.



The screenshot shows a table header with columns: Id, Primary order num, Status, Order comments, Assignment start, Assignment end, Target date, Assigned workers, Template name, Assigned sector, and Contact name. Each column has a sort icon (asc/desc) at the top.

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.



The screenshot shows a table header with columns: Id, Primary order num, Status, Order comments, Assignment start, Assignment end, Target date, Assigned workers, Template name, Assigned sector, and Contact name. Multiple sort icons are visible across the header, indicating multiple sort operations.

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  drop down menu.

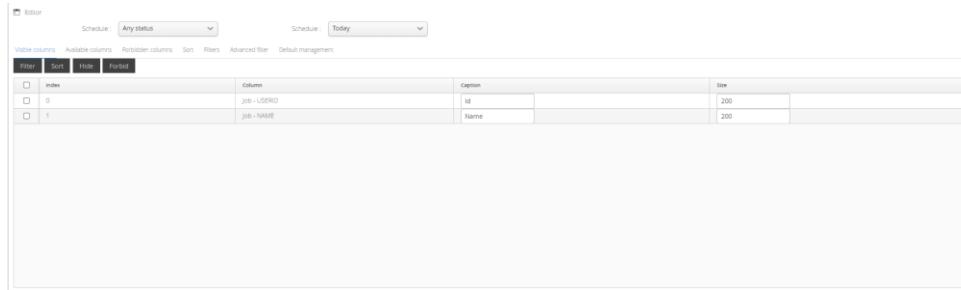
To set the Default Status shown, click on the  drop down menu.

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.

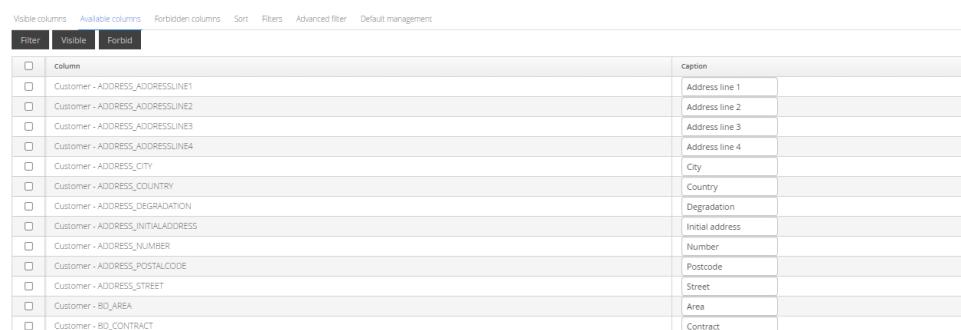
Page | 25



Available Columns

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

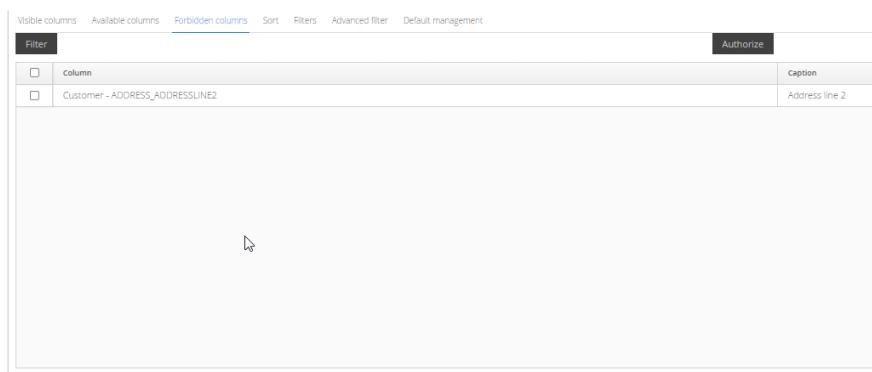
- 1) Add the column as a Filter Option (by clicking **Filter**)
- 2) Add the column to the Visible column list (by clicking **Visible**)
- 3) Restricting availability to the column (by clicking **Forbid**)



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)



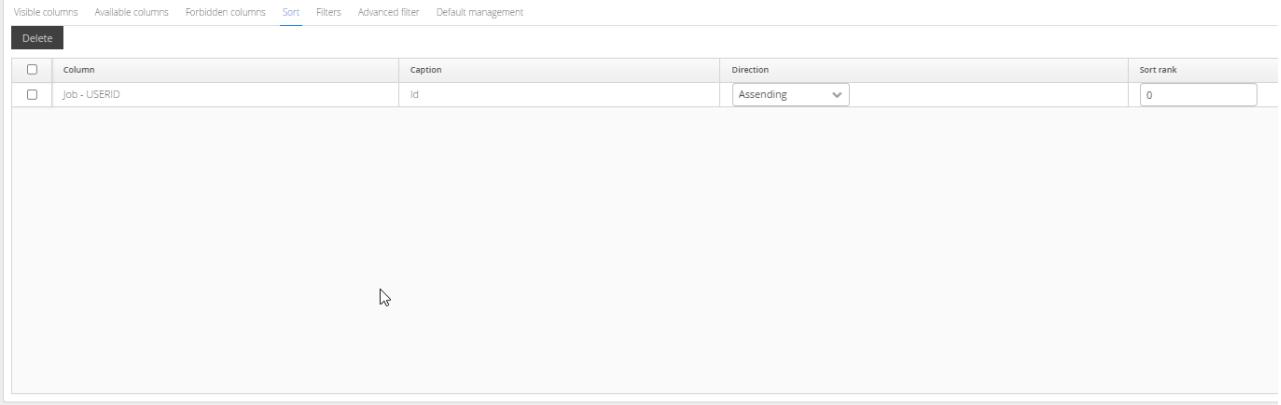
Sorting

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)

Page | 26

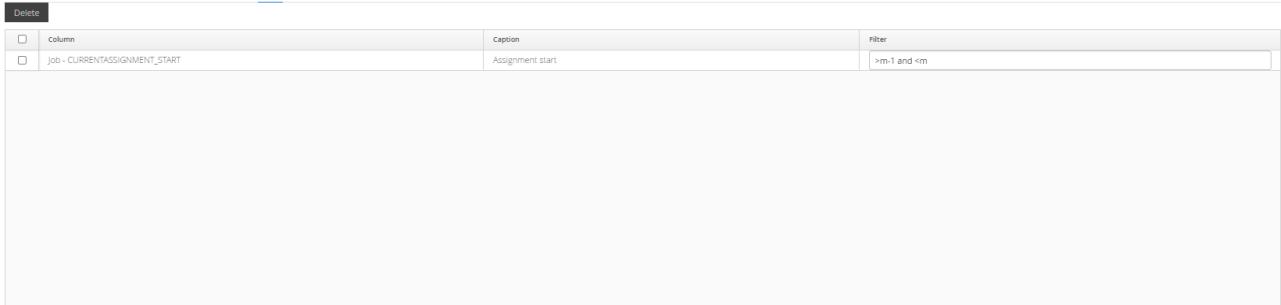
NOTE: Sorting will be applied in the priority specified within the Sort Rank



Delete				
	Column	Caption	Direction	Sort rank
<input type="checkbox"/>	job - USERID	Id	Ascending	0

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.



Delete			
	Column	Caption	Filter
<input type="checkbox"/>	Job - CURRENTASSIGNMENT_START	Assignment start	>m-1 and <m

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...,valuuen) eg. Job Template in (Plumbing, Joinery, Electrician)
- Boolean: * eg. Name =Mike* or =John* or =*Smith*

Number filtering

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

- 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

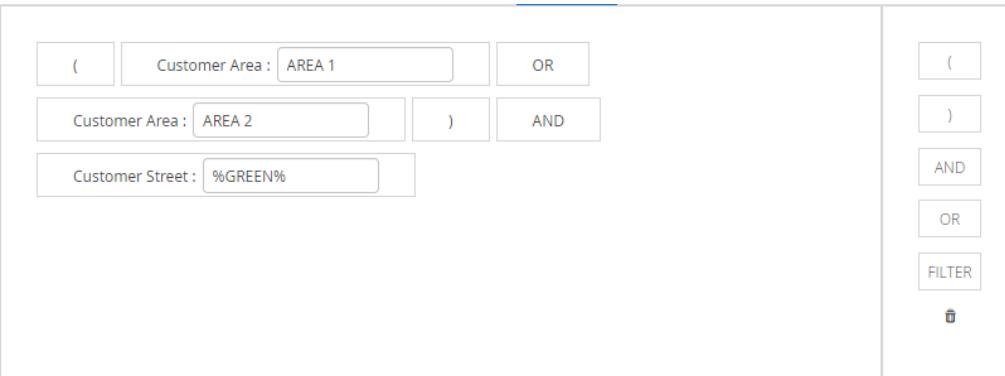
Advanced Filtering

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.



The screenshot shows a filter builder interface. On the left, there are several input fields and operators. At the top left is an opening parenthesis '('. To its right is a field labeled 'Customer Area : AREA 1'. To the right of that is an 'OR' operator. Below this is another 'Customer Area : AREA 2' field, followed by a closing parenthesis ')' and an 'AND' operator. At the bottom is a 'Customer Street : %GREEN%' field. On the right side of the interface is a vertical toolbar with the following buttons from top to bottom: an opening parenthesis '(', a closing parenthesis ')', an 'AND' button, an 'OR' button, a 'FILTER' button, and a trash can icon.

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.



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](#)

Page | 28

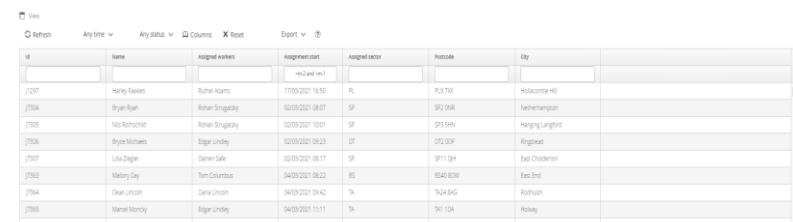
Saving your Filter

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.



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.

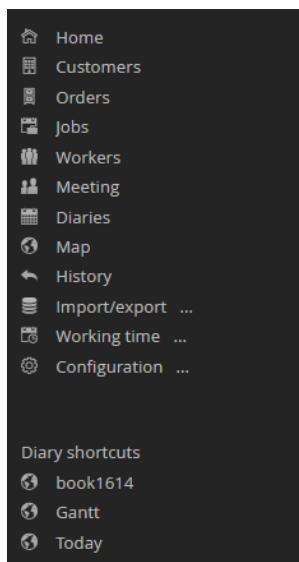


View: Refresh Any time Any status Columns Reset Export

ID	Name	Assigned workers	Assignment start	Assigned vector	Postcode	City
27397	Harley Failes	Rumer Adams	17/09/2021 16:50	PL	PL9 7XK	Hotcombe Hill
27384	Bryce Ryan	Rumer Stringfay	02/09/2021 08:07	SP	SP2 0WB	Nethehampton
27365	Nils Rommelt	Rumer Stringfay	02/09/2021 10:01	SP	SP1 5AH	Hanging Langford
27364	Bryce Mcleod	Edgar Lindley	02/09/2021 09:23	DT	DT2 0DS	Reginald
27357	Lisa Zeger	Darren Sale	02/09/2021 08:17	SP	SP1 1HJ	East Chidham
27363	Melody Day	Tom Colossus	04/09/2021 08:22	BS	BS40 8DN	East End
27364	Dean Lincoln	Daria Lincoln	04/09/2021 09:42	TA	TA2 8AG	Rothwell
27365	Melanie Monday	Edgar Lindley	04/09/2021 11:11	TA	TA1 1PA	Honey

Customers

Page | 29

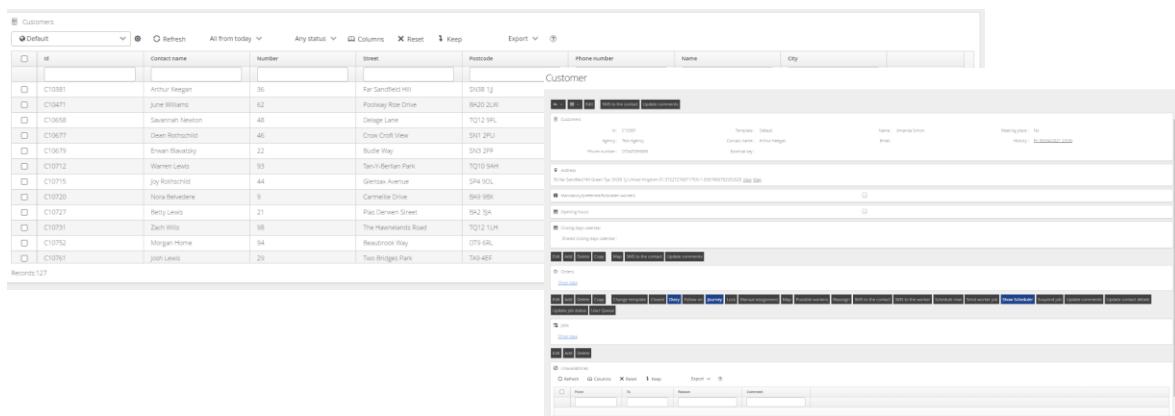


Home
Customers
Orders
Jobs
Workers
Meeting
Diaries
Map
History
Import/export ...
Working time ...
Configuration ...

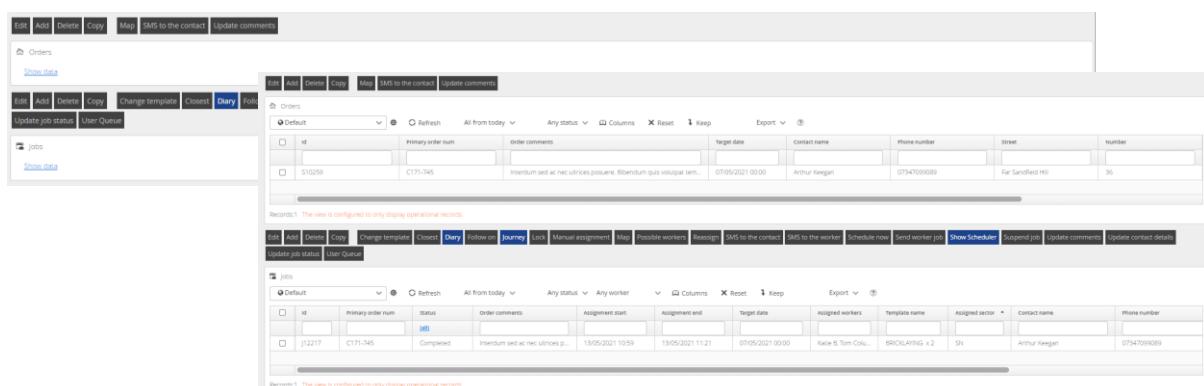
Diary shortcuts
book1614
Gantt
Today

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

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



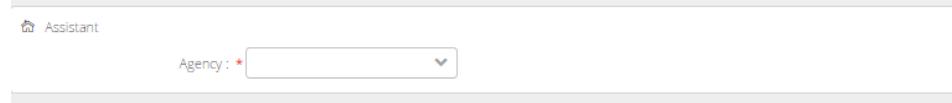
Add/Edit/Copy

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

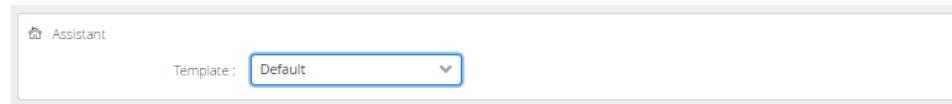


Page | 30 Selecting any customer will allow you to use these functions to Amend, Copy or Delete that record.

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

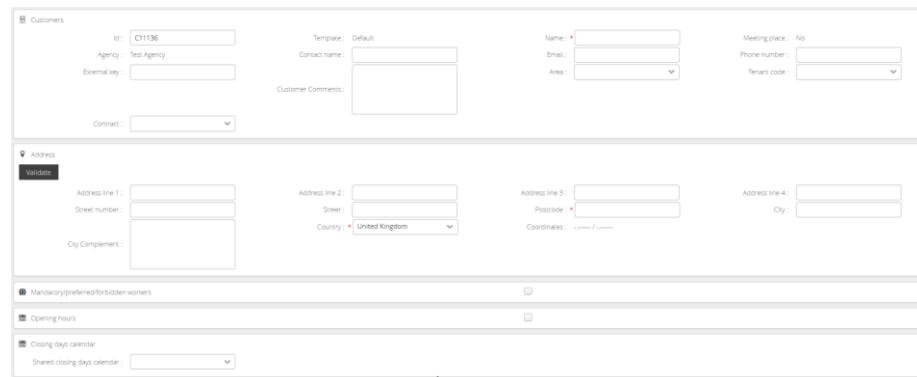


Then Select the appropriate Customer Template and then click NEXT.



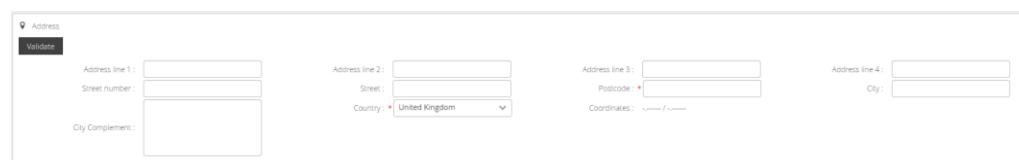
Complete all required fields in the following screen. Any screen marked with a * are Mandatory. Every other field is optional but can still be completed if needed.

NOTE: The ID value must be unique.



The screenshot shows the 'Customers' data entry screen. It includes fields for basic customer information (Id, Agency, Contact name, Customer Comments, Contact), and address details (Address line 1-4, Street, Postcode, Coordinates, Country). There are also sections for 'Mandatory/preferred forbidden workers', 'Opening hours', and 'Closing day calendar'.

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.



The screenshot shows the 'Address' validation screen. It includes fields for address lines 1-4, street, postcode, coordinates, and country. A validation message 'Address line 1: EH29 9FX United Kingdom 55.96012449068114/-3.401943369348615 Edit Map' is displayed below the address line 1 field.

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.



The screenshot shows the 'Address' validation screen with a map link: 'Edit Map'.

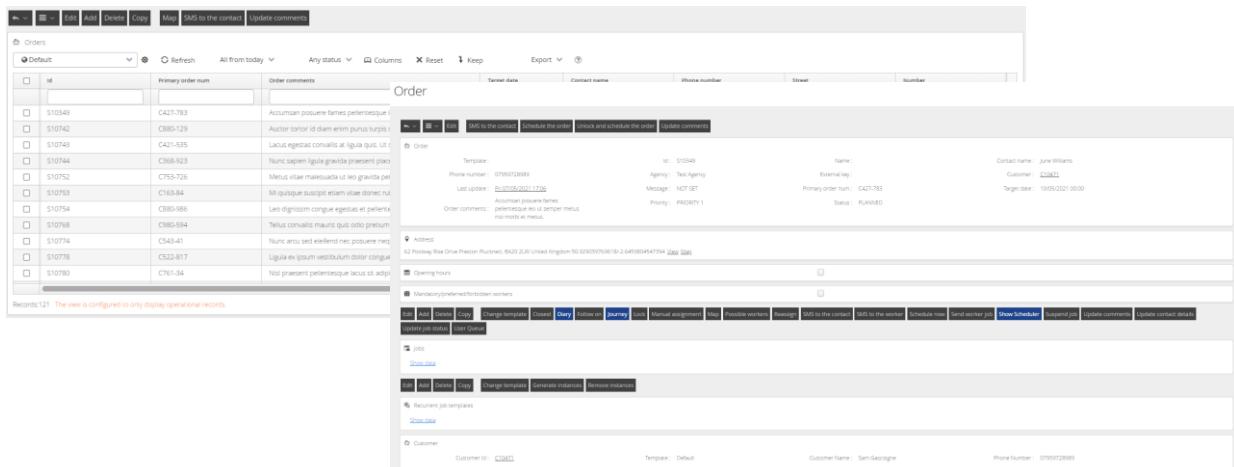
Delete

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.

Page | 31

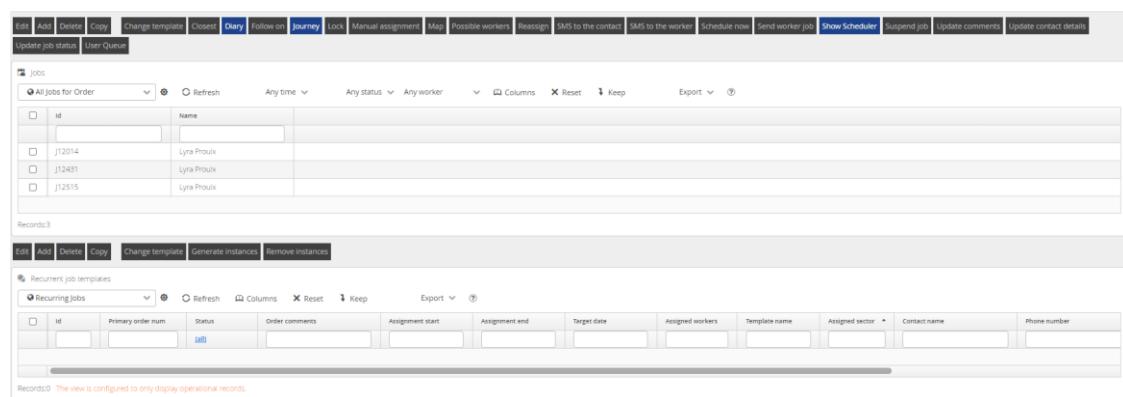


The screenshot shows the DRS Orders view. At the top, there are buttons for Edit, Add, Delete, Copy, User, SMS to the contact, and Update comments. Below this is a search bar and a filter section for Order status, columns, and export options. The main table lists 12 orders, each with a checkbox, ID, Primary order num, and Order comments. The comments for the first few orders are as follows:

- S10349: C427-783. Accumsan posuere tunc.
- S10742: C980-129. Auctor conor id diam enim purus.
- S10748: C421-535. Lacus egestas convallis at ligula quis.
- S10748: C988-823. Nunc sapien ligula gravida present.
- S10752: C753-726. Menus vibus malesuada ut leo gravida.
- S10753: C163-84. Mi quisque suscipit etiam vivit donec nra.
- S10754: C980-886. Leo dignissim congue egestas et penela.
- S10788: C980-594. Telus convallis mauris quis odio present.
- S10774: C543-41. Nunc arcu sed eleifend nec posuere.
- S10778: C522-817. Ligula ex ipsum vestibulum dolor congue.
- S10780: C761-34. Nisi praesent posse tunc lacus sit ad.

Below the table, there is a note: "Records:121 The view is configured to only display operational records." The bottom of the screen shows a navigation bar with links for Home, Add, Delete, Copy, Change template, Closest, Diary, Follow on, Journey, Lock, Manual assignments, Map, Possible workers, Reassign, SMS to the contact, SMS to the worker, Schedule now, Send worker job, Show Scheduler, Suspend job, Update comments, and Update contact details.

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



The screenshot shows the DRS Jobs view. At the top, there are buttons for Edit, Add, Delete, Copy, Change template, Closest, Diary, Follow on, Journey, Lock, Manual assignments, Map, Possible workers, Reassign, SMS to the contact, SMS to the worker, Schedule now, Send worker job, Show Scheduler, Suspend job, Update comments, and Update contact details. Below this is a search bar and a filter section for Any time, Any status, Any worker, columns, and export options. The main table lists 3 jobs, each with a checkbox, ID, and Name. The names are J12014, J12431, and J12515, all associated with Lyra Proulx. Below the table, there is a note: "Records:3 The view is configured to only display operational records." The bottom of the screen shows a navigation bar with links for Home, Add, Delete, Copy, Change template, Generate instances, Remove instances, Recurring job templates, Recurring jobs, and Recurring job instances.

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

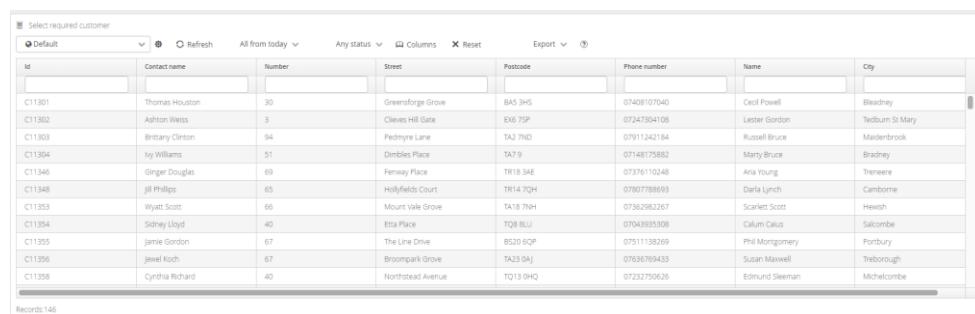
Add/Copy/Edit

Add will require you to select your required Agency.



The screenshot shows the DRS Add/Copy/Edit view. At the top, there is a search bar and a filter section for Default, Refresh, All from today, Any status, Columns, and Reset. Below this is a table with columns for Id, Contact name, Number, Street, Postcode, Phone number, Name, and City. The table lists 14 customers, each with a checkbox. The names include Thomas Houston, Ashton Weiss, Brittany Clinton, Ivy Williams, Ginger Douglas, Jill Phillips, Wyatt Scott, Shirley Lloyd, Jamie Gordon, Jewel Koch, and Cynthia Richard. The bottom of the screen shows a note: "Records:146 The view is configured to only display operational records."

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



The screenshot shows the DRS Add/Copy/Edit view. At the top, there is a search bar and a filter section for Default, Refresh, All from today, Any status, Columns, and Reset. Below this is a table with columns for Id, Contact name, Number, Street, Postcode, Phone number, Name, and City. The table lists 14 customers, each with a checkbox. The names include Thomas Houston, Ashton Weiss, Brittany Clinton, Ivy Williams, Ginger Douglas, Jill Phillips, Wyatt Scott, Shirley Lloyd, Jamie Gordon, Jewel Koch, and Cynthia Richard. The bottom of the screen shows a note: "Records:146 The view is configured to only display operational records."

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

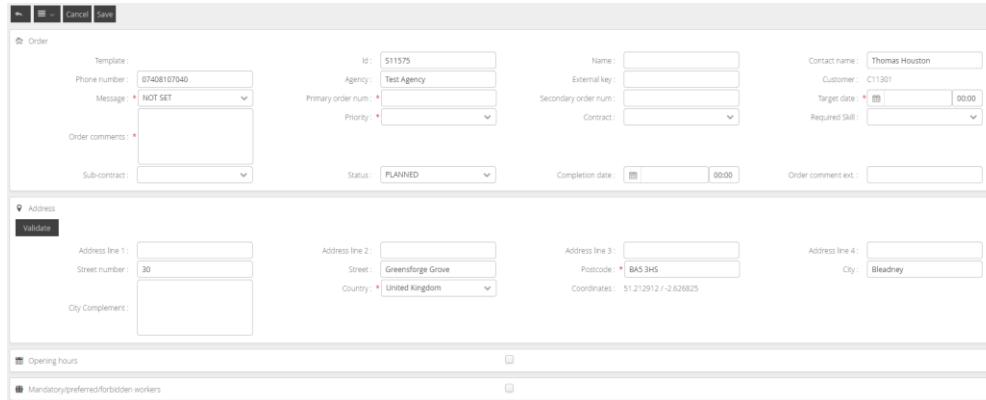


Selected agency: Ximbrace
Selected customer: C11301 - Cecil Powell

Order template
Templates: Start date:

Page | 32

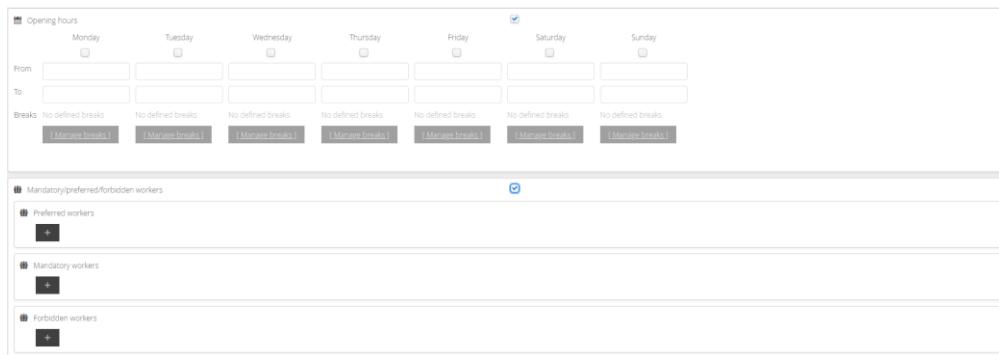
Complete all required fields. Fields marked with a * are Mandatory.



Template: 07408107040
Message: NOT SET
Order comments:
Sub-contract:
Id: 511575
Agency: Test Agency
Primary order num.: *
Priority: *
Name:
External key:
Secondary order num:
Contract:
Customer: C11301
Target date: * Required Skill:
Status: PLANNED
Completion date: 00:00
Order comment ext:
Address
Address line 1:
Street number: 30
City Complement:
Address line 2:
Street: Greensforge Grove
Country: * United Kingdom
Address line 3:
Postcode: * BAS 3HS
Coordinates: 51.212912/-2.826825
Address line 4:
City: Bleadney

Opening hours
 Mandatory/preferred/forbidden workers

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



Opening hours
Monday Tuesday Wednesday Thursday Friday Saturday Sunday
From
To
Breaks: No defined breaks Mandatory workers Preferred workers **Forbidden workers**
 Mandatory/preferred/forbidden workers
 Preferred workers **Mandatory workers** **Forbidden workers**
 Mandatory workers **Preferred workers** **Forbidden workers**
 Forbidden workers **Mandatory workers** **Preferred workers**

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

Delete

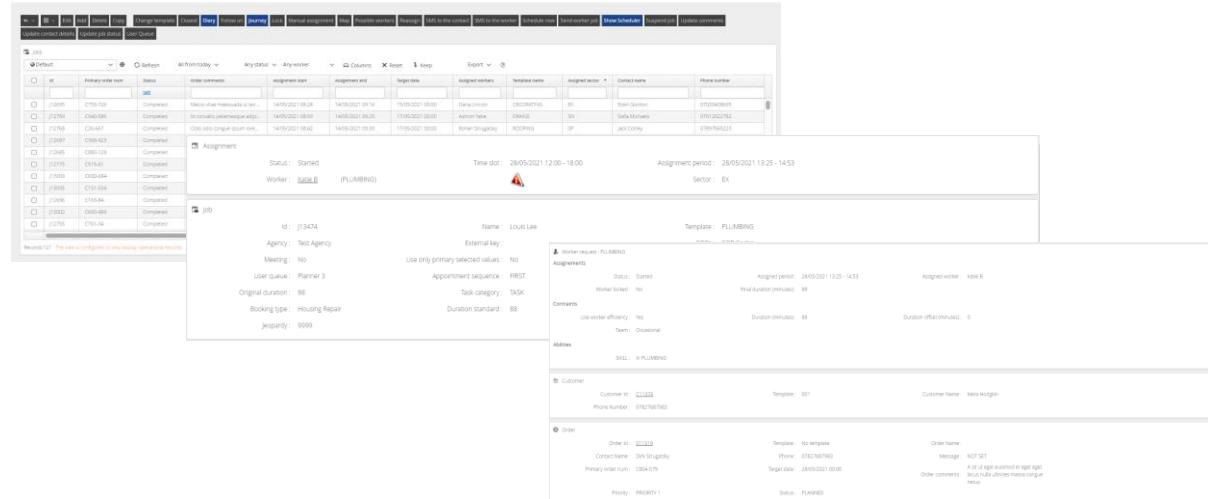
Delete will remove the selected Object. This function cannot be reversed.

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

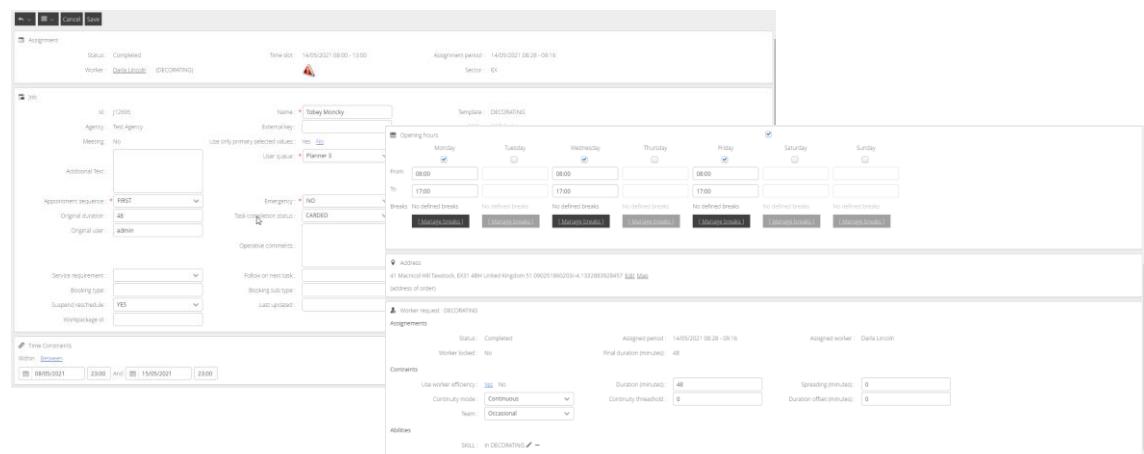
Page | 33



The screenshot shows the 'Jobs' list view. At the top, there are various filters and search options. Below the header, a grid of job items is displayed, each with a checkbox and a 'Complaint' status. One job item is selected, and its details are shown in a large, detailed view pane on the right. The detailed view includes sections for 'Assignment', 'Job', 'Customer', and 'Order'. The 'Assignment' section shows a worker named 'Kore B' assigned to a task with a start time of 28/05/2021 12:00 - 18:00. The 'Job' section shows a worker named 'Louis Lee' with a task category of 'PLUMBING'. The 'Customer' section shows a customer named 'Kira Holligan' with a phone number of 07827897983. The 'Order' section shows an order with a priority of 'PRIORITY 1'.

Edit

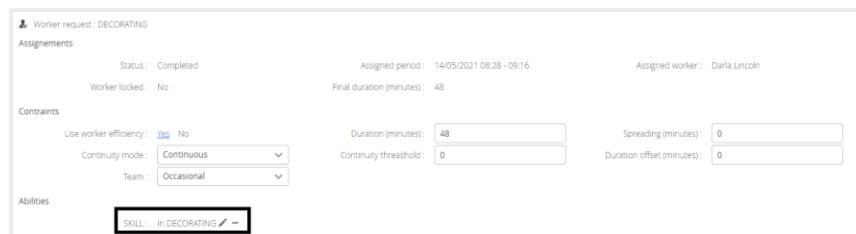
Select a single job from the data grid by checking the box to the left and then select Edit. To make amendments to the Job Detail, Time Constraints, Opening Hours and Worker Assignment.



The screenshot shows the 'Edit' view for a selected job. The top navigation bar includes tabs for 'Assignment', 'Job', 'Customer', and 'Order'. The 'Assignment' tab is active, showing details like 'Status: Completed', 'Worker: [2885] (DECORATING)', 'Time slot: 14/05/2021 08:00 - 13:00', 'Assignment period: 14/05/2021 08:28 - 09:16', and 'Sector: EX'. The 'Job' tab shows a worker named 'Tobey Monday' assigned to a task with a category of 'DECORATING'. The 'Customer' tab shows a customer named 'Dirk Strugala' with a phone number of 07827897983. The 'Order' tab shows an order with a priority of 'PRIORITY 1'. The 'Job' tab has several sub-sections: 'Additional test', 'Appointment sequence', 'Original duration', 'Original user', 'Service requirement', 'Booking type', 'Support schedule', 'Work package id', 'Time Constraints', and 'Abilities'. The 'Abilities' section is expanded, showing a skill named 'In DECORATING'.

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

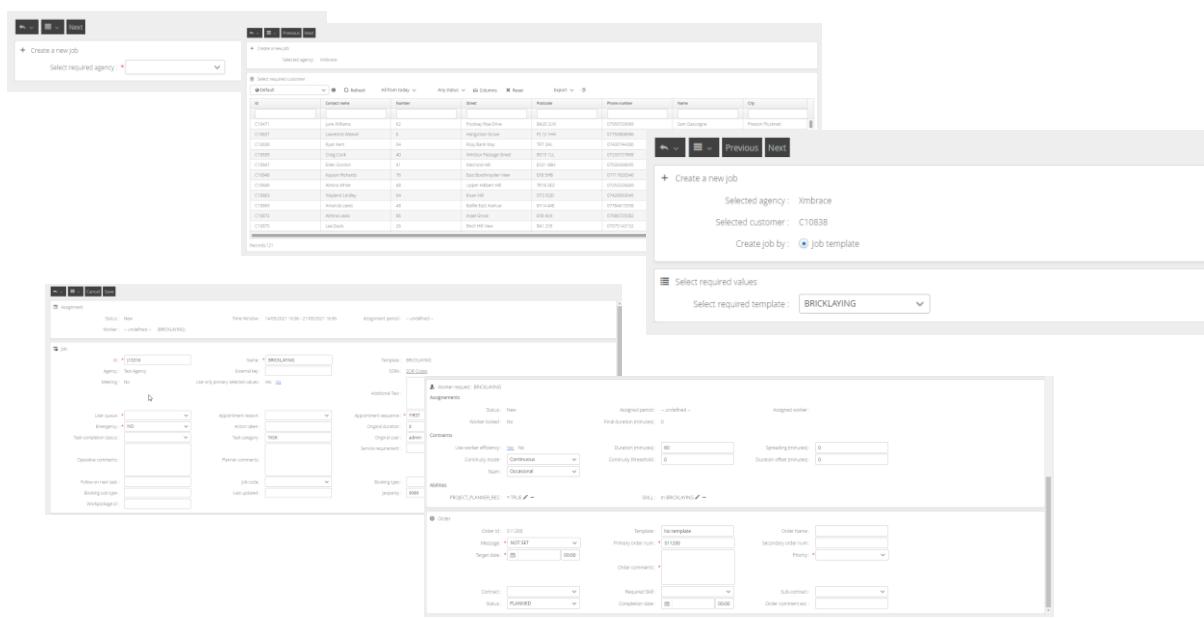


The screenshot shows the 'Abilities' section of the 'Edit' view. It displays a table with columns for 'Ability', 'Duration (minutes)', 'Spreading (minutes)', and 'Duration offset (minutes)'. The table has one row with the ability 'SKILL: In DECORATING'. The 'Ability' column has a pencil icon, indicating it can be edited.

Add

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

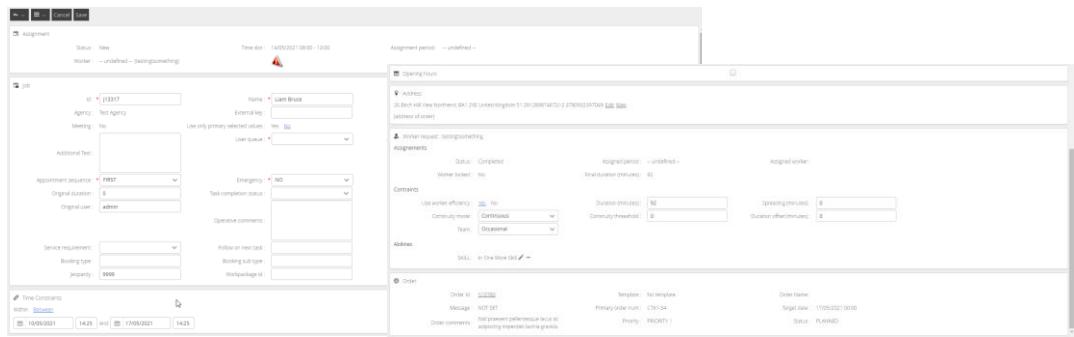
Page | 34



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.



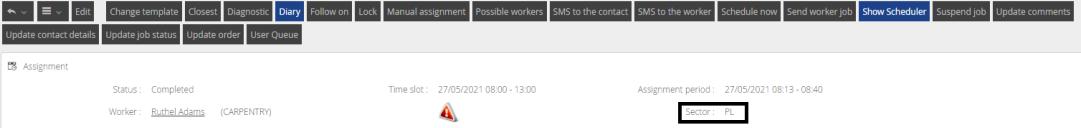
Perform any required changes and click Save. This will create a new entry in your Jobs list.

Delete

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

Sectors

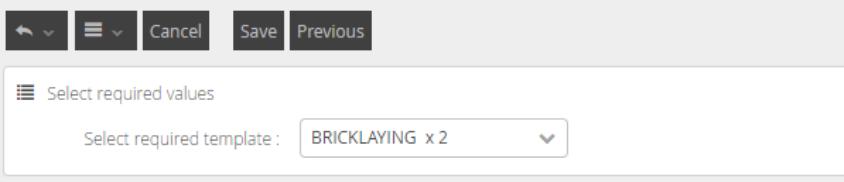
Sectors are now displayed for the Job within the Job Details itself.



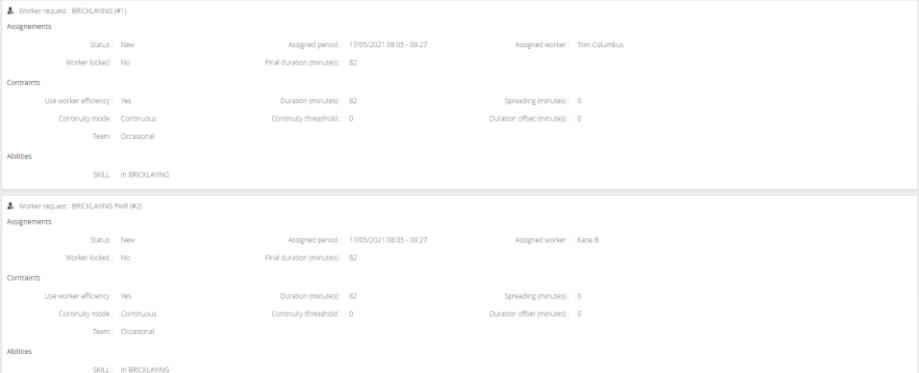
Page | 35

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.

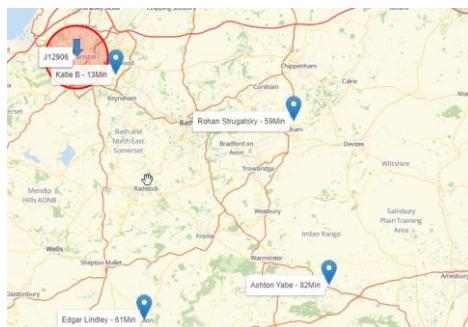


Once saved, the worker request will be changed to reflect the requirements of the new Template.



Closest

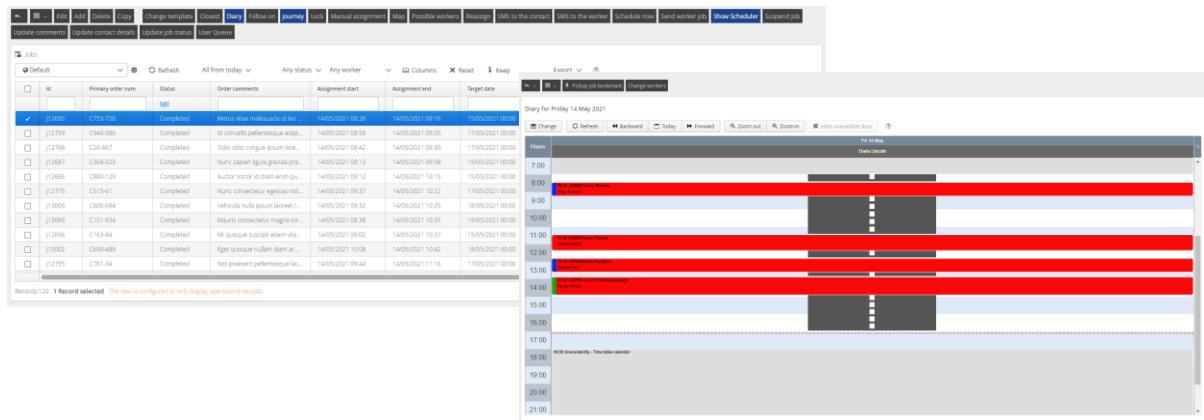
If you are a DRS Maps customer, clicking Closest will show you on the map the job and the operatives relative to the job. The Job and relative area will show as a blue arrow with a red ring. All possible workers will be shown on the map with markers based on your configuration.



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.



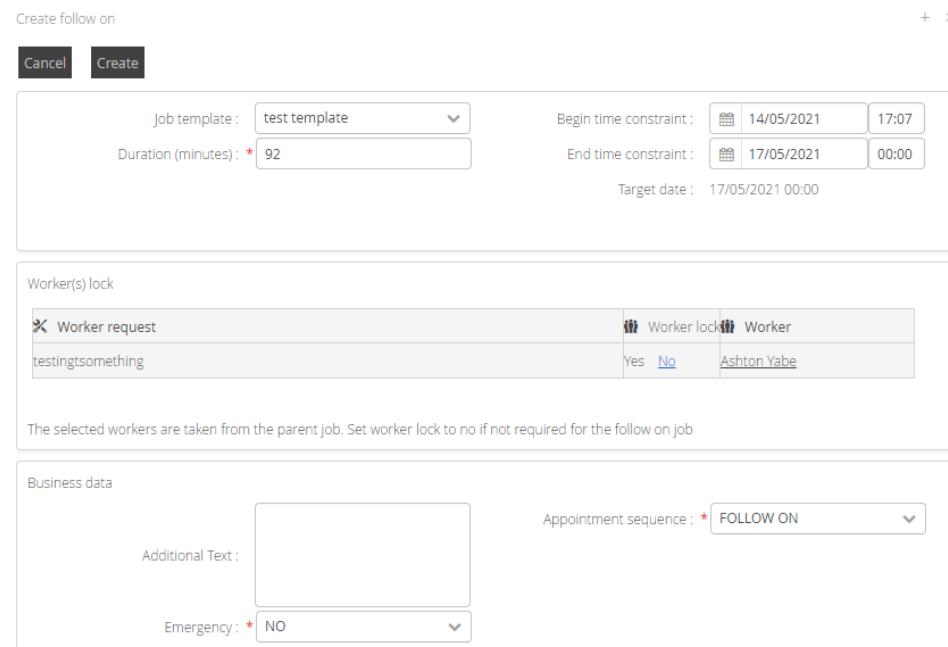
The screenshot shows the 'Jobs' list on the left and a 'Resource Diary' on the right. The Jobs list table includes columns for ID, Primary order num, Status, Order comments, Assignment start, Assignment end, and Target zone. The Resource Diary shows a timeline from 7:00 to 21:00 on Friday, 14 May 2021, with several red bars representing job assignments. A legend at the top of the diary indicates 'Jobs in progress' (red), 'Jobs assigned' (green), and 'Jobs completed' (blue).

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.



The dialog box for 'Create follow on' contains the following fields:

- 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	Worker lock	Worker
testingsomething	Yes <input type="radio"/>	<u>Ashton.Yabe</u>

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:** (Empty text area)
- Appointment sequence:** * FOLLOW ON
- Emergency:** * NO

Journey

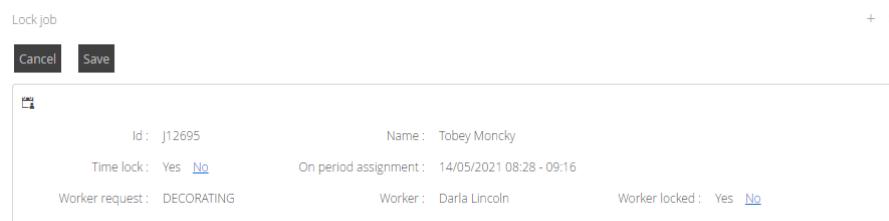
Selecting a number of Jobs from the Jobs View and clicking Journey will show the predicted route taken by the Resource(s) to deliver the tasks. Where multiple resources are identified, these will be colour coded.

Page | 37



Lock

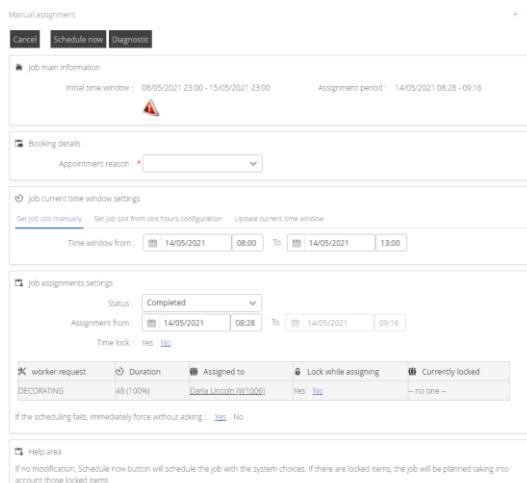
Selecting a number of Jobs from the Jobs List and clicking the Lock button will display pop up window.



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

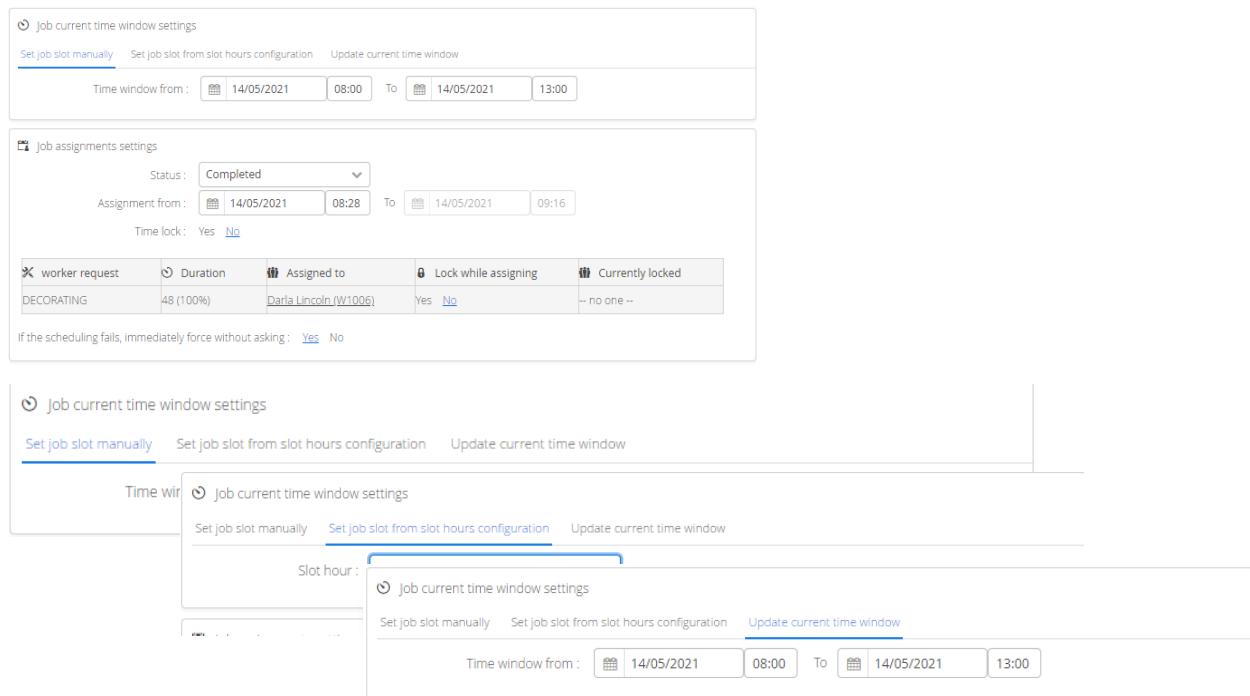
Manual Assignment

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



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.

Page | 38

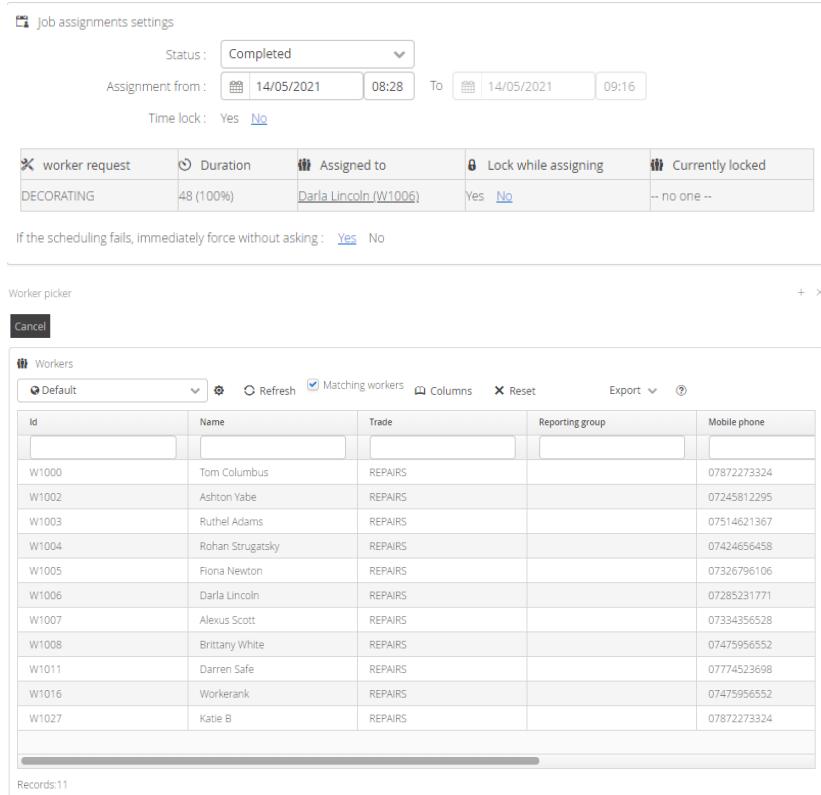


The screenshot displays a software interface for managing job assignments. At the top, there are three tabs: 'Job current time window settings' (selected), 'Set job slot manually' (highlighted in blue), and 'Set job slot from slot hours configuration' and 'Update current time window'. Below these tabs, a 'Time window from' field is set to '14/05/2021 08:00' and a 'To' field is set to '14/05/2021 13:00'.

Under the 'Job assignments settings' section, the 'Status' is set to 'Completed'. The 'Assignment from' field shows '14/05/2021 08:28' and the 'To' field shows '14/05/2021 09:16'. The 'Time lock' is set to 'Yes' (No is also an option). The 'Worker request' table shows a single entry: 'DECORATING' (48 (100%)) assigned to 'Darla Lincoln (W1006)' with 'Lock while assigning' set to 'Yes' (No) and 'Currently locked' status as '-- no one --'. A note at the bottom says 'If the scheduling fails, immediately force without asking: Yes No'.

Below this, another 'Job current time window settings' section is shown, with the 'Set job slot manually' tab selected. It has a 'Slot hour' dropdown menu. The 'Time window from' field is set to '14/05/2021 08:00' and the 'To' field is set 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.



The screenshot shows a 'Worker picker' dialog box. At the top, there is a 'Cancel' button and a 'Workers' section with a 'Default' dropdown, a 'Refresh' button, and a 'Matching workers' checkbox (which is checked). There are also 'Columns' and 'Reset' buttons, and an 'Export' dropdown.

The main area is a table with columns: 'Id', 'Name', 'Trade', 'Reporting group', and 'Mobile phone'. The table contains 11 records, each with a worker's name, trade (REPAIRS), reporting group, and mobile phone number. The workers listed are: W1000 (Tom Columbus), W1002 (Ashton Yabe), W1003 (Ruthel Adams), W1004 (Rohan Strugatsky), W1005 (Fiona Newton), W1006 (Darla Lincoln), W1007 (Alexis Scott), W1008 (Brittany White), W1011 (Darren Safe), W1016 (Workerank), and W1027 (Katie B).

At the bottom of the dialog box, it says '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.

Page | 39

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 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	Alexis 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.

Page | 40

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.

Worker picker

+ X

Cancel

Possible workers

Selected worker

Darren Safe (W1011)  

Workers

Default	Matching workers	Columns	Reset	Export	?
<input type="button" value="Default"/>	<input type="checkbox"/> Refresh <input checked="" type="checkbox"/> Matching workers	<input type="button" value="Columns"/>	<input type="button" value="Reset"/>	<input type="button" value="Export"/>	<input type="button" value="?"/>
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 - Alexus Scott

Reschedule jobs:

Page | 41

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

Initial time windows

20/05/2021 00:00 And 21/05/2021 00:00

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 + ×

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

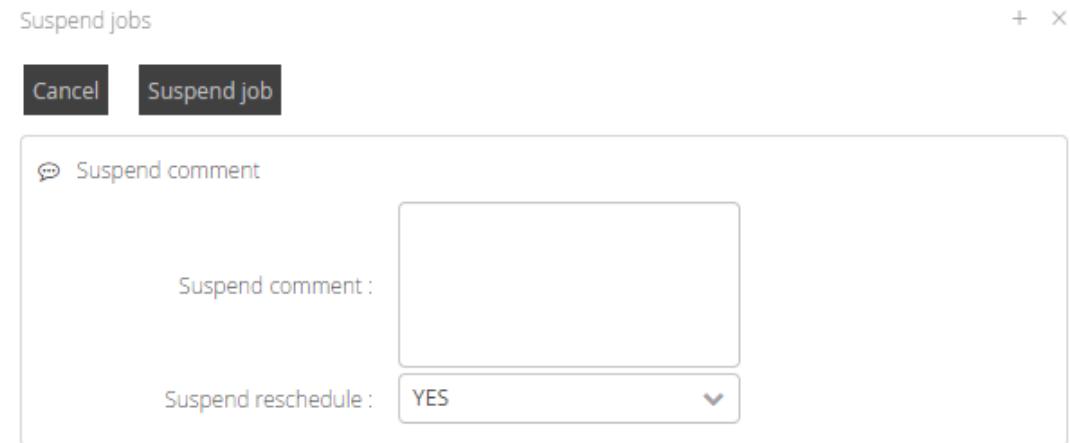
Show Scheduler

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.



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

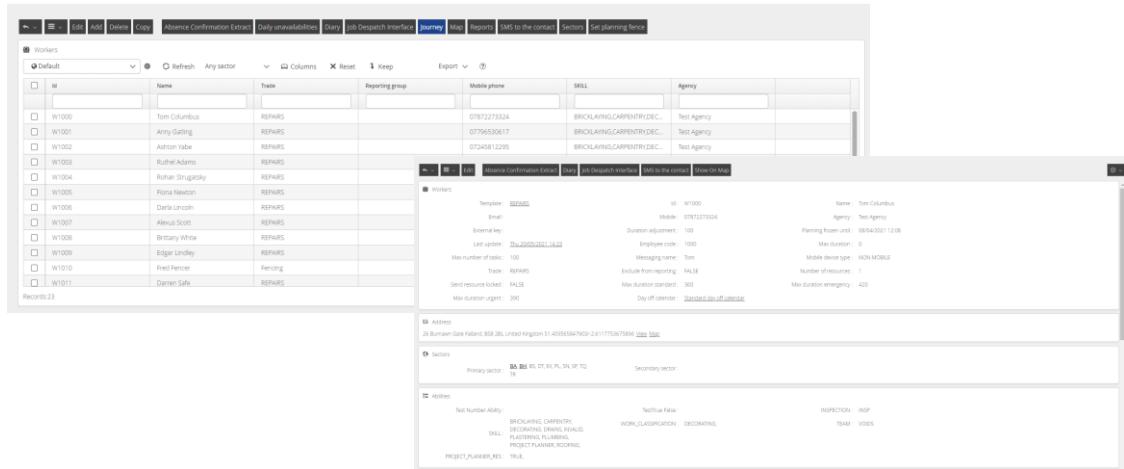
No change in V6. Please refer to the 5.7 User Guide. Appendix 1.

Workers

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

Workers

Page | 43



The screenshot shows the 'Workers' detail panel. On the left, a list of workers is displayed with columns for ID, Name, Trade, Reporting group, Mobile phone, Skill, and Agency. The 'Agency' column shows 'Test Agency' for all workers. On the right, a detailed view for worker W1000 is shown. The detailed view includes sections for 'Workers' (with a 'Template' dropdown set to 'REPAIRS'), 'Address' (26 Burmaw Gate Falland, B58 2BL, United Kingdom), 'Sectors' (Primary sector: 'REPAIRS'), and 'Notes' (Net Number Ability: 'REPAIRING, CARPENTRY, DECORATING, DRILLS (HAND), PLASTERING, PLUMBING, PROJECT PLANNING, ROOFING, Tiling', Skill: 'REPAIRS', Work Classification: 'DECORATING', Team: 'VOIDS').

Add

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



The screenshot shows a form for 'Create a new worker'. It has a 'Create a new worker' button and a 'Agency' dropdown menu.

Then the Worker Template Type



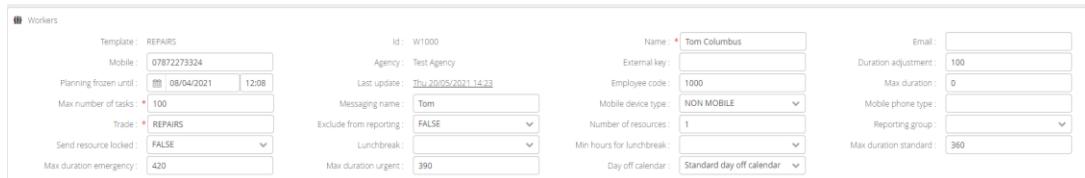
The screenshot shows a form for 'Create a new worker'. It has a 'Create a new worker' button, an 'Agency' dropdown set to 'Xmbrace', and a 'Template' dropdown.

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

Edit



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



The screenshot shows the 'Edit' form for worker W1000. It includes fields for '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 2005/2021 14:23), 'Messaging name' (Tom), 'Exclude from reporting' (FALSE), 'Lunchbreak' (390), 'External key' (1000), 'Employee code' (1000), 'Mobile device type' (NON MOBILE), 'Number of resources' (1), 'Min hours for lunchbreak' (0), 'Day off calendar' (Standard day off calendar), 'Email' (Tom.Columbus), 'Duration adjustment' (100), 'Max duration' (0), 'Mobile phone type' (NON MOBILE), 'Reporting group' (Test Agency), and '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.



The screenshot shows the 'Edit' form for worker W1000. It includes a 'Address' section with the address '26 Burmaw Gate Falland, B58 2BL, United Kingdom' and a 'Map' link.

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:

Street number:

Street:

Postcode: *

City:

Country: *

City Complement:

Coordinates: 51.459566 / -2.611775

Page | 44

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 :  

TestTrue False :  

INSPECTION :   

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

SKILL :  

WORK_CLASSIFICATION : DECORATING,   

TEAM : VOIDS,   

PROJECT_PLANNER_RES : TRUE,   

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.

Page | 45

Variability editor

Cancel Copy Paste Save

Refresh Columns Reset Keep Export ?

<input type="checkbox"/>	Name	Variabilities count	Start date of variabilities	End date of variabilities
<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

Cancel Save Delete all

Add variability 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

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	 

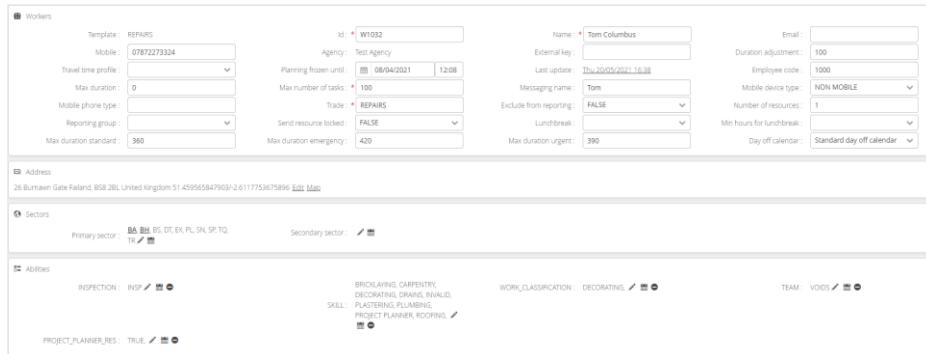
From  21/05/2021 To  21/05/2021 

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.

Page | 46



The screenshot shows a 'Copy' dialog box for a worker record. The 'Template' is set to 'REPAIRS'. The 'Id' is 'W1032'. The 'Name' is 'Tom Columbus'. The 'Duration adjustment' is '100'. The 'Mobile' field contains '07872273324'. The 'Agency' is 'Test Agency'. The 'Planning frozen until' is '08/04/2021 12:08'. The 'Max duration' is '0'. The 'Max duration standard' is '360'. The 'Max duration emergency' is '420'. The 'Max duration urgent' is '390'. The 'Last update' is 'Thu 20/05/2021 16:38'. The 'Messaging name' is 'Tom'. The 'Exclude from reporting' is 'FALSE'. The 'Lunchbreak' is '1'. The 'Min hours for lunchbreak' is '1'. The 'Day off calendar' is 'Standard day off calendar'. The 'External key' is 'Tom Columbus'. The 'Employee code' is '1000'. The 'Mobile device type' is 'NON MOBILE'. The 'Number of resources' is '1'. The 'Send resource locked' is 'FALSE'. The 'Address' is '26 Burner Gate, Falland, BS8 2BL, United Kingdom 51.4595658479601-2.6117753675896'. The 'Sectors' section shows 'Primary sector' as 'BA, BS, DT, EX, PL, SN, SP, TQ' and 'Secondary sector' as 'T, T, T'. The 'Abilities' section shows 'INSPECTION' and 'SKILL' checkboxes checked. The 'PROJECT PLANNER, ROOFING, PLUMBING' checkbox is checked. The 'WORK CLASSIFICATION' is 'DECORATING'. The 'TEAM' is 'VOIDS'. The 'PROJECT_PLANNER_RES' field is set to 'TRUE'. There are also 'Edit', 'Map', and 'Delete' buttons.

Delete

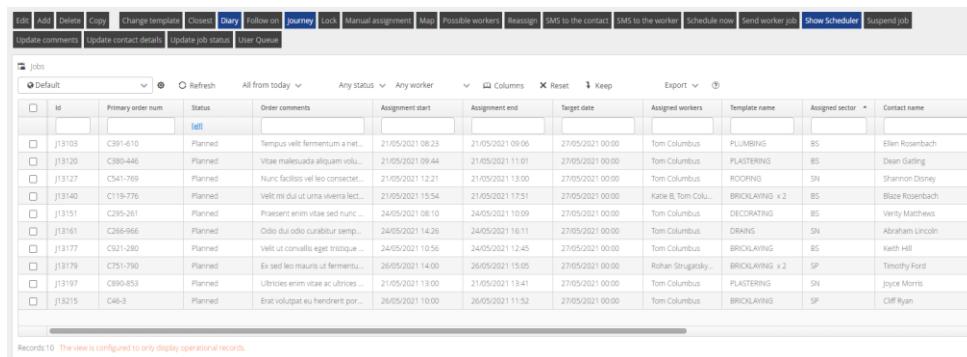
Delete will remove the selected Object. This function cannot be reversed.

Job List



The screenshot shows the 'Job List' page with a toolbar at the top containing buttons for 'Edit', 'Add', 'Delete', 'Copy', 'Change template', 'Closest', 'Diary', 'Follow on', 'Journey', 'Lock', 'Manual assignments', 'Map', 'Possible workers', 'Reassign', 'SMS to the contact', 'SMS to the worker', 'Schedule now', 'Send worker job', 'Show Scheduler', and 'Suspend job'. Below the toolbar is a sub-toolbar with buttons for 'Update comments', 'Update contact details', 'Update job status', and 'User Queue'. The main area shows a table of jobs with columns for 'Id', 'Primary order num', 'Status', 'Order comments', 'Assignment start', 'Assignment end', 'Target date', 'Assigned workers', 'Template name', 'Assigned sector', and 'Contact name'. The table includes rows for various operative IDs and their assigned tasks. At the bottom of the table, a note says 'Records 10 - The view is configured to only display operational records.'

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

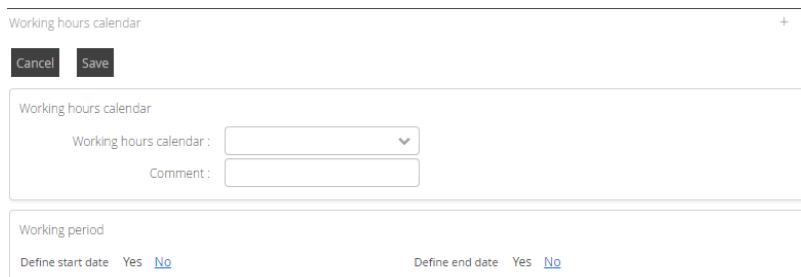


The screenshot shows the 'Show Data' view for an operative with a toolbar at the top containing buttons for 'Edit', 'Add', 'Delete', 'Copy', 'Change template', 'Closest', 'Diary', 'Follow on', 'Journey', 'Lock', 'Manual assignment', 'Map', 'Possible workers', 'Reassign', 'SMS to the contact', 'SMS to the worker', 'Schedule now', 'Send worker job', 'Show Scheduler', and 'Suspend job'. Below the toolbar is a sub-toolbar with buttons for 'Update comments', 'Update contact details', 'Update job status', and 'User Queue'. The main area shows a table of jobs with columns for 'Id', 'Primary order num', 'Status', 'Order comments', 'Assignment start', 'Assignment end', 'Target date', 'Assigned workers', 'Template name', 'Assigned sector', and 'Contact name'. The table includes rows for various operative IDs and their assigned tasks. At the bottom of the table, a note says 'Records 10 - The view is configured to only display operational records.'

Working Hours Calendar

Add a Calendar

Add a New calendar by clicking the ADD button.



The screenshot shows the 'Working hours calendar' add dialog box. It has a 'Working hours calendar' header with 'Cancel' and 'Save' buttons. The main area contains a 'Working hours calendar' input field with a dropdown menu and a 'Comment' input field. Below this is a 'Working period' section with 'Define start date' and 'Define end date' fields, both set to 'Yes'.

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

Working hours calendar

Page | 47

Working hours calendar

Working hours calendar :

Comment :

Working period

Define start date Yes Define end date Yes

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

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 Define end date Yes

Start date Included end

Edit a Calendar

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

Working hours calendars

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

Records: 1

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

Working hours calendar :

Comment :

Working period

Define start date Yes Define end date Yes

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.

Page | 48

From	To	Reason	Comment
08/10/2020 00:00	09/10/2020 00:00		
16/10/2020 00:00	17/10/2020 00:00	Holiday	
01/11/2020 00:00	02/11/2020 00:00	Assigned To Voids	
21/11/2020 00:00	23/11/2020 00:00	Vehicle Maintenance	
22/11/2020 00:00	23/11/2020 00:00	Special Duties	

Unavailability

+ ×

Cancel
Save

Unavailability

Start date : * 00:00

End date : * 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

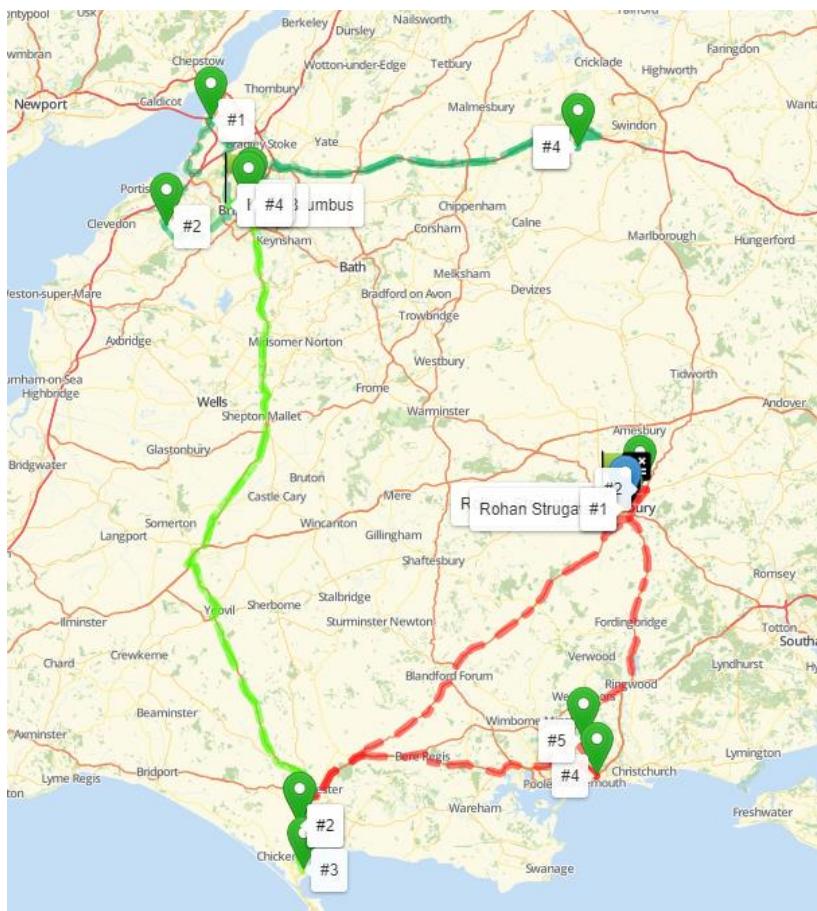
+ ×

Cancel Yesterday Today Tomorrow Selected date

Display for the

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

Page | 49



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

Cancel

 Sectors

Postcode per sector Refresh 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

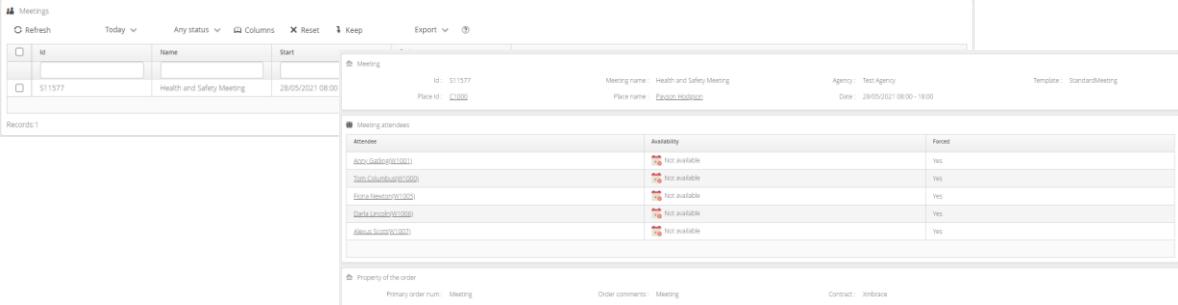
Set Planning Fence

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.

Page | 51



The screenshot shows the 'Meetings' window with a list of meetings. A single meeting is selected, showing its details: Id: S11577, Name: Health and Safety Meeting, Start: 28/05/2021 08:00, Place: Payson Hodgson, Agency: Test Agency, Date: 28/05/2021 08:00 - 18:00, and Template: StandardMeeting. The 'Meeting attendees' section shows a list of attendees with their availability and forced status.

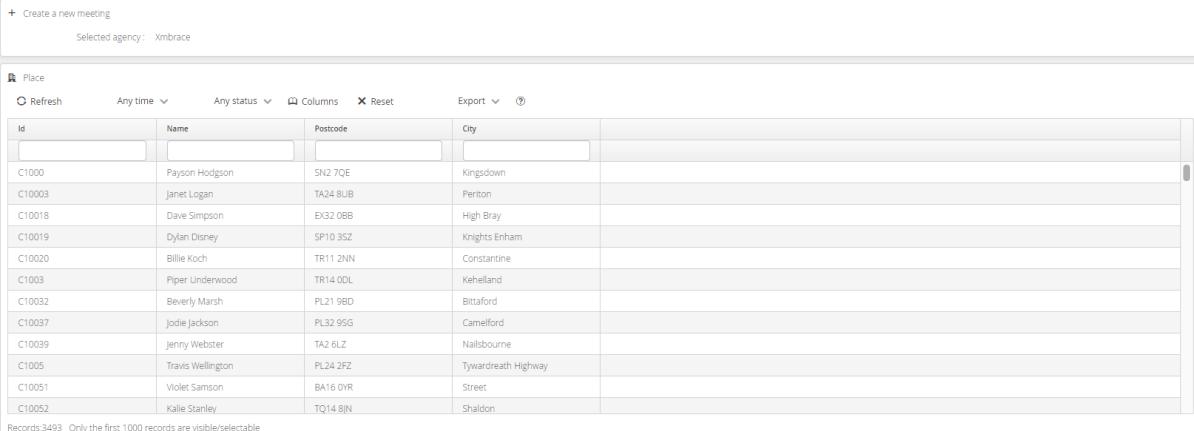
Add

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



The screenshot shows a dialog box for creating a new meeting. It includes a dropdown menu for 'Selected agency' with 'Xmbrace' selected.

Select your Meeting property.



The screenshot shows a search results table for 'Place'. It includes columns for Id, Name, Postcode, and City. The table lists various locations such as Kingdowm, Penton, High Bray, Knights Enham, Constantine, Kehelland, Bittonford, Camelford, Nailsbourne, Tywardreath Highway, Street, and Shaldon. A note at the bottom says 'Records 3493 Only the first 1000 records are visible/selectable'.

Set the Meeting Name and Time Window.



The screenshot shows a dialog box for scheduling a meeting. It includes fields for 'Meeting name' (Health and Safety Meeting), 'Agency' (Test Agency), 'Place name' (Janet Logan), 'Date' (28/05/2021), 'Start' (08:00), 'End' (18:00), 'Template' (StandardMeeting), and 'Place Id' (C10003).

Select your required Workers by clicking Add Attendees.



The screenshot shows a dialog box for 'Meeting attendees'. It includes buttons for 'Add attendees', 'Check availability', and 'Update attendees diary'. The main table has columns for 'Attendee' and 'Availability'.

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

Worker picker

+

X

Page | 52

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 No
Tom.Columbus(W1000)	Unknown	Yes No
Ashton.Yabe(W1002)	Unknown	Yes No
Ruthel.Adams(W1003)	Unknown	Yes No
Rohan.Strugatsky(W1004)	Unknown	Yes No
Edgar.Lindley(W1009)	Unknown	Yes No
Fred.Fencer(W1010)	Unknown	Yes No

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

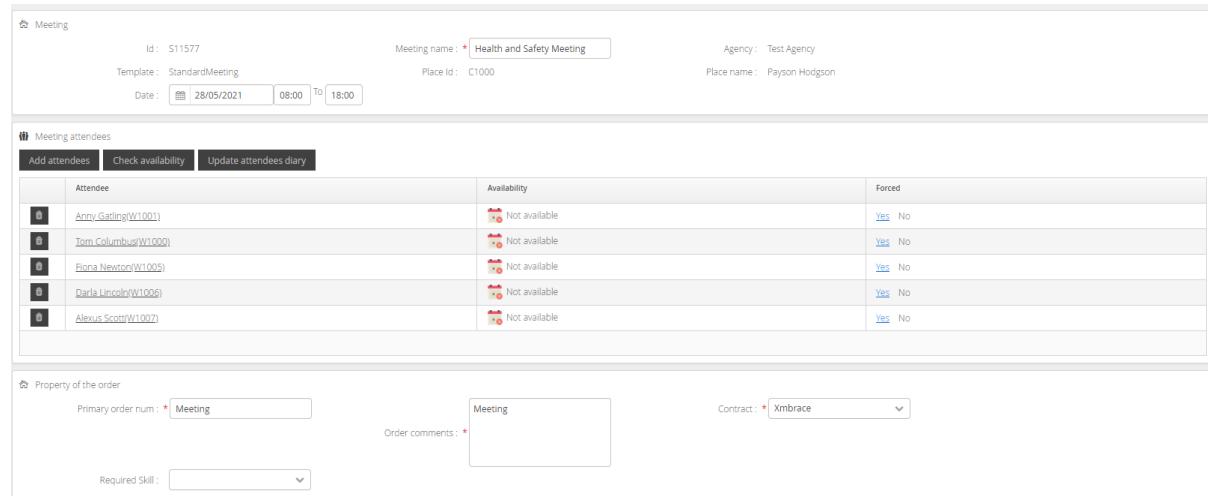
Copy

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.

Page | 53



Attendee	Availability	Forced
Amy/Gatling(W1001)	Not available	Yes No
Tom/Columbus(W1000)	Not available	Yes No
Elena/Newton(W1005)	Not available	Yes No
Darla/Lincoln(W1006)	Not available	Yes No
Alexius/Scorn(W1007)	Not available	Yes No

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

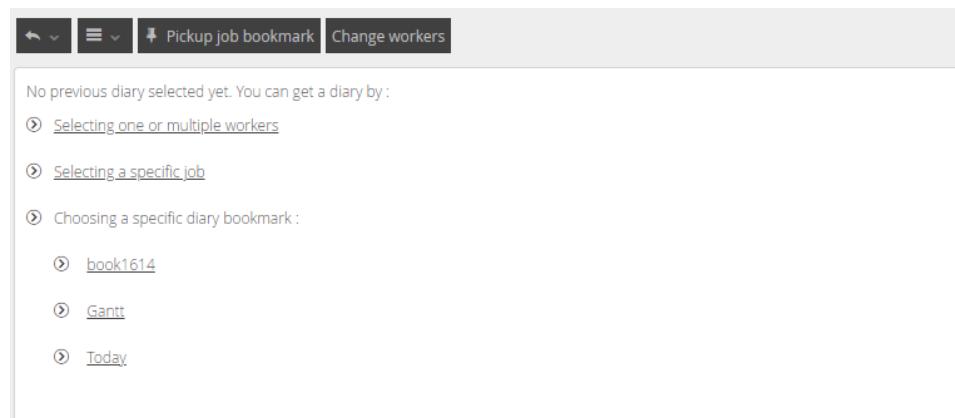
Delete

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

Diaries

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

Page | 54



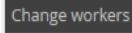
No previous diary selected yet. You can get a diary by :

- ② [Selecting one or multiple workers](#)
- ② [Selecting a specific job](#)
- ② Choosing a specific diary bookmark :
 - ② [book1614](#)
 - ② [Gantt](#)
 - ② [Today](#)

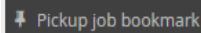
Following the links will take you to the Workers or Job Screen, or one of your pre-selected bookmarks.

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.

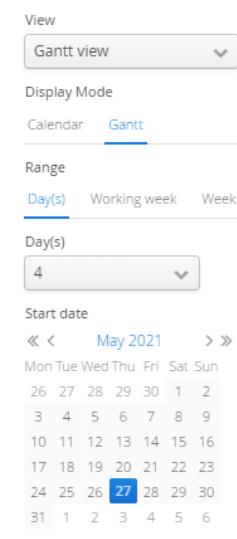
Pickup Job Bookmark

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

Gaant

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

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



View

Gantt view

Display Mode

Calendar Gantt

Range

Day(s) Working week Week

Day(s)

4

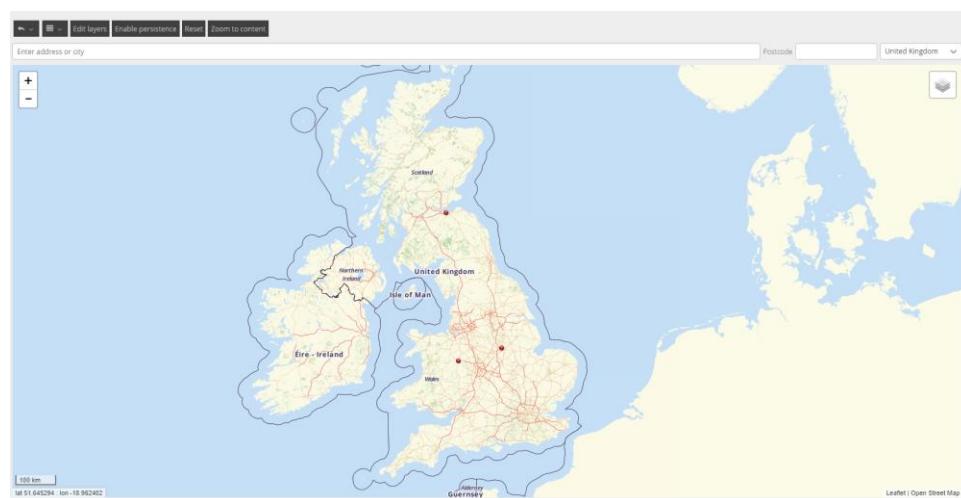
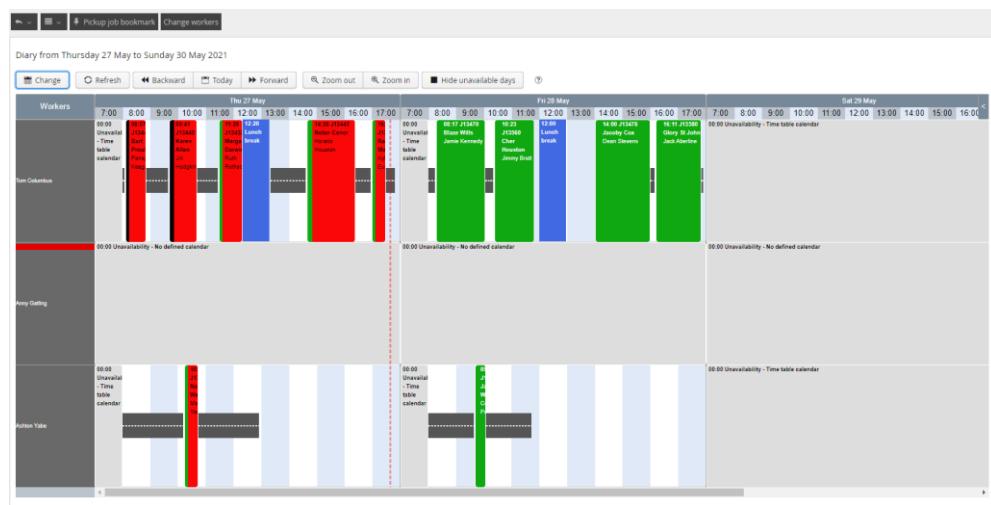
Start date

May 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

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.

Zoom to Content

Zooming can be done by clicking the +/- button, or using your scroll wheel. Using the Zoom to Content button will bring your icon pins into close focus.

Page | 56

Using Maps from the Object Screens

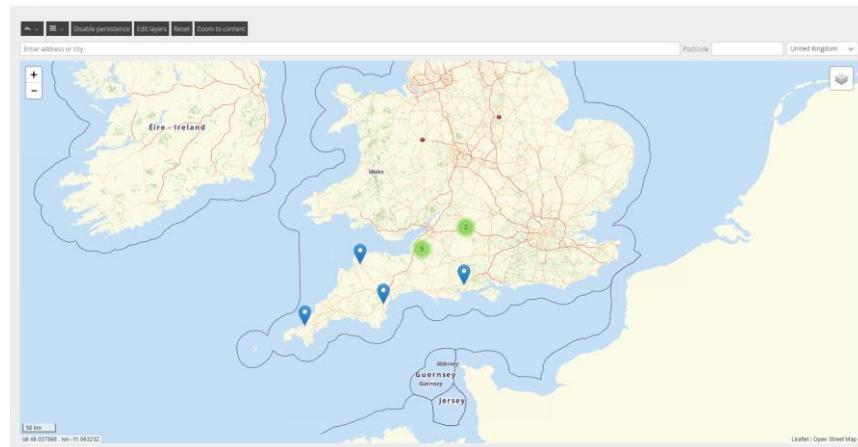
Selecting a number of objects and clicking the Map button will display the Map with the items selected.

Customers

Customers								
Customer		Customer name	Number	Street	Postcode	Phone number		
Comments						Name		
						City		
<input checked="" type="checkbox"/>	C1000	Elmbridge	40	Westgate	GU1 1QR	01483600000	Elspeth Hargrove	Kingston
<input checked="" type="checkbox"/>	C10000	Malvern Service	10	Gravelly Lane	B91 2RQ	07800000000	Dorey Colleagues	Worcs/Cross
<input checked="" type="checkbox"/>	C10001	Neon Court	40	Almondbury Gate	TF9 8QS	07500000000	Mark Colman	Bolton/Merthyr
<input checked="" type="checkbox"/>	C10002	Willy McDonald	10	Gibson Green Hill	EX3 3JU	07752420000	Medina Roberts	Dean
<input type="checkbox"/>	C10003	Elm Centre	10	Clayton New Hill	TQ12 8LF	01273000000	John Loggin	Perth
<input checked="" type="checkbox"/>	C10004	Kale-Team	40	Northgate Walk	BA1 1BT	07712300000	Karen Peters	Brentford Logi
<input checked="" type="checkbox"/>	C10005	Health Chelmsford	1	Thompson Lane	T90 5AA	01205250000	Brian Miller	Spennymoor
<input checked="" type="checkbox"/>	C10006	Almond Centre	10	Almondgate Centre	TF1 1RQ	01205250000	Steve Atkin	Brighton Logi
<input type="checkbox"/>	C10007	Elmbridge	10	Elmbridge	GU1 1RQ	01483600000	Elspeth Hargrove	Kingston
<input checked="" type="checkbox"/>	C10008	Willy Lame	40	Elmbridge Place	GU1 1RQ	01483600000	Elspeth Hargrove	Kingston
<input checked="" type="checkbox"/>	C10009	Water Resource	10	Waterton Avenue	TQ12 4RQ	07712300000	Elspeth Hargrove	Kingston

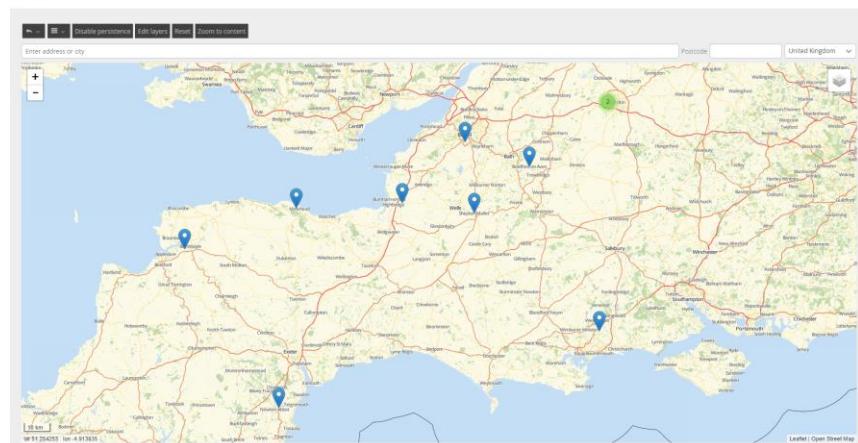
Where the items selected are close to each other on the map, they will be displayed as a consolidated icon.

Map



Zooming in will show these items as singular points.

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.

Page | 57

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.

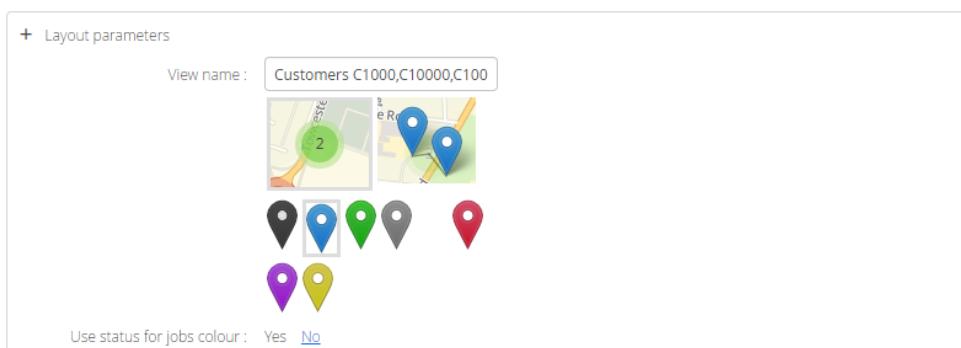
Edit layer Customers C1000,C10000,C10001,C10002,C10003,C10004,C10005,C10006,C10007,C10008,C10009

Cancel Save

+ Layout parameters

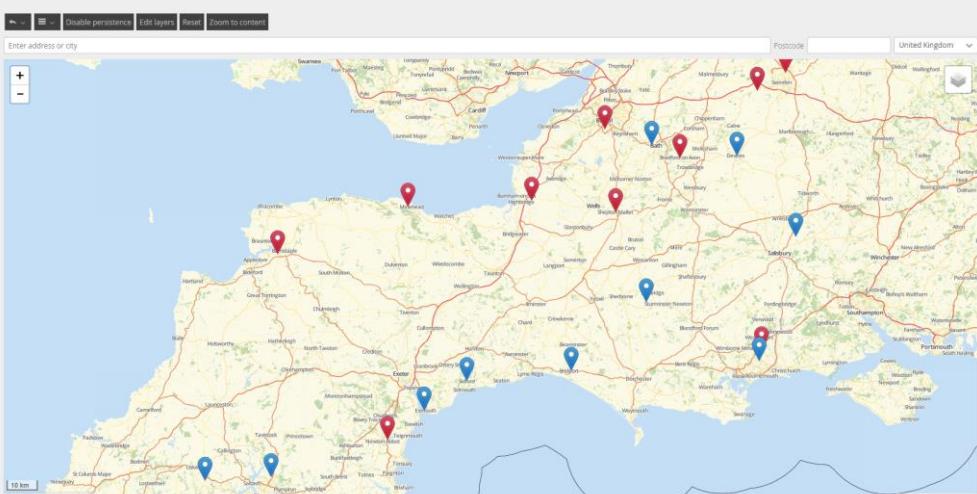
View name : Customers C1000,C10000,C10001,C10002,C10003,C10004,C10005,C10006,C10007,C10008,C10009

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

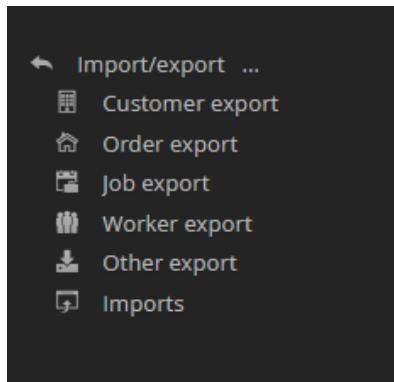
The History tab is now available within it's own menu option in the Left Menu. Access to this can be controlled through the Profiles option within the Configuration Menu.

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

Import/Export

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

Page | 60



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

Customers							
Default		Contact name	Number	Street	Postcode	Phone number	Name
C11046	Betty Lewis	93	Co-Operative Road	TA22 9LH	07724992389	Molly Maxwell	Vern
C11047	Keira Winchester	5	Stalley Royd Gate	BA2 2LR	07895404082	Sally Quincy	Hinton Charterhouse
C11048	Jackson Underwood	93	Lyne Cough Court	TA4 1Bj	07954241379	Dick Eliaon	Chippable
C11049	Tara Keegan	54	Crimicar View	BH15 9FK	07472797726	Ewin Chatterton	Sterte
C11059	Wayland Williams	5	Kirknewton Road	SP11 9BH	07858749574	Greg Stanley	Upper Chute
C11065	Alexa Morcky	29	Vecquaray Drive	BA9 9AB	07645273283	Yann Chatterton	Pear Ash
C11072	Kerwan Marsh	35	Elm Trees Lane	BH15 1WZ	07758928354	Ruby Hotgkin	Stanley Green
C11085	Denis Levy	91	Spotland Court	BA12 0PF	07831741347	Stacy Samson	Lower Zeals
C11090	Anabeth Love	3	Dornic View	SP4 8FH	07495661817	Warren Nguyen	East Gomelton
C11093	Dougle Hill	3	Higher Arthurs Court	SP3 4OB	07835076014	Tyler Avery	Compton Chamberlayne
C11124	Courtney Brown	13	Papernill Wynd Walk	DT11 8PD	07098450990	Henry Bradford	Langton Long Blandford

Records:140

The following buttons are available:

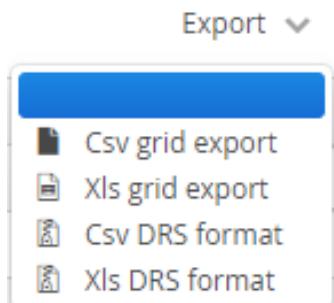
Export All as CSV: This will export an editable CSV document in the correct Import format.

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.

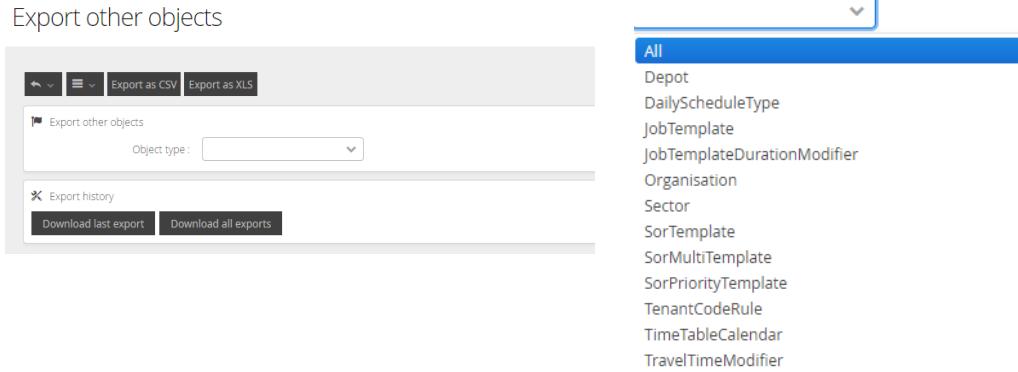
Selecting the functions from the Export Menu will also achieve the same ends.



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.

Page | 61



Export other objects

Object type :

All

- Depot
- DailyScheduleType
- JobTemplate
- JobTemplateDurationModifier
- Organisation
- Sector
- SorTemplate
- SorMultiTemplate
- SorPriorityTemplate
- TenantCodeRule
- TimeTableCalendar
- TravelTimeModifier

Export as CSV Export as XLS

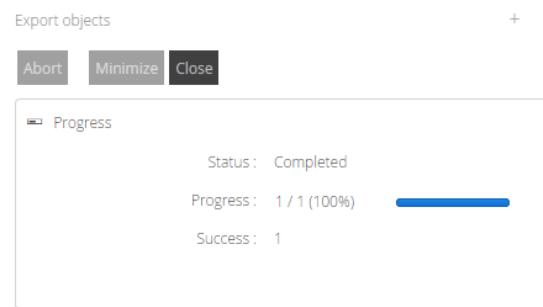
Export other objects

Object type :

Export history

Download last export Download all exports

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



Export objects

Abort Minimize Close

Progress

Status: Completed

Progress: 1 / 1 (100%)

Success: 1

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



Export history

Download last export Download all exports

This will download your requested export.

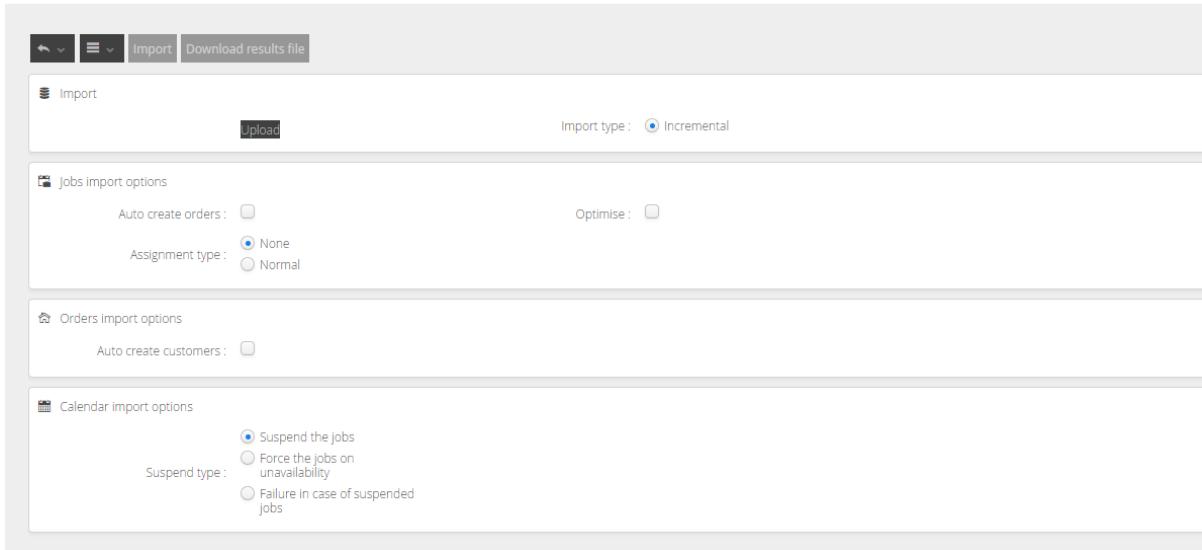
Imports

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.

Page | 62

Import objects



Import

Upload Import type: Incremental

Jobs import options

Auto create orders: Optimise:

Assignment type: None Normal

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.

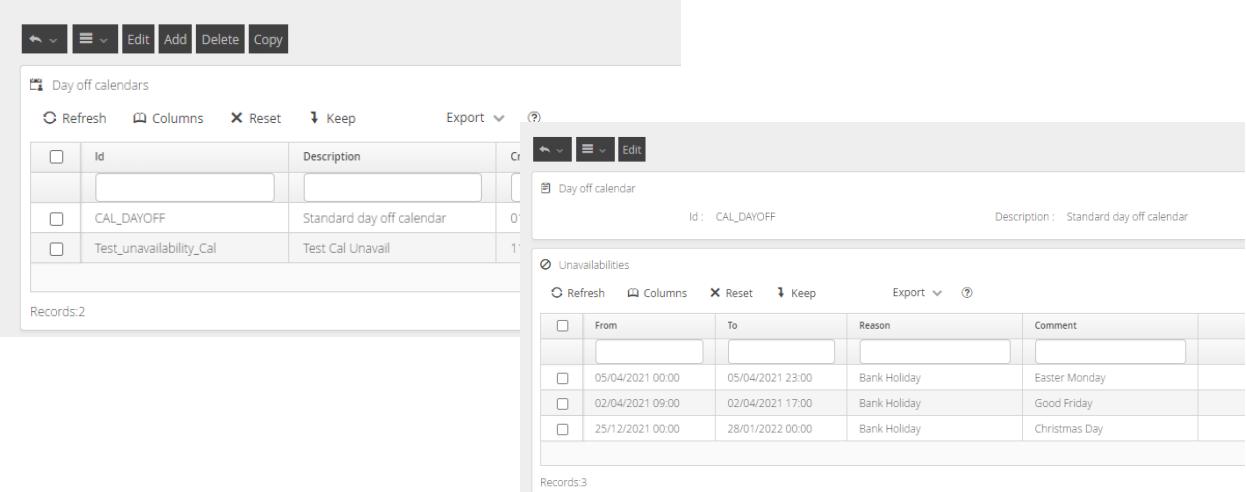
Working Time

Day Off Calendar

Selecting the Day off Calendar option will display the currently configured Day Off Calendars. Clicking on any single Calendar will display the currently configured days off.

Page | 63

Day off calendars



The screenshot shows the 'Day off calendars' interface. At the top, there are buttons for Refresh, Columns, Reset, Keep, Export, and a search bar. Below is a table with columns for Id, Description, and a checkbox. Two entries are listed: 'CAL_DAYOFF' (Standard day off calendar) and 'Test_unavailability_Cal' (Test Cal Unavail). The bottom shows 'Records:2'.

Day off calendar (CAL_DAYOFF):

- Description:** Standard day off calendar
- Reasons:**
 - 05/04/2021 00:00 - 05/04/2021 23:00: Bank Holiday, Easter Monday
 - 02/04/2021 09:00 - 02/04/2021 17:00: Bank Holiday, Good Friday
 - 25/12/2021 00:00 - 28/01/2022 00:00: Bank Holiday, Christmas Day

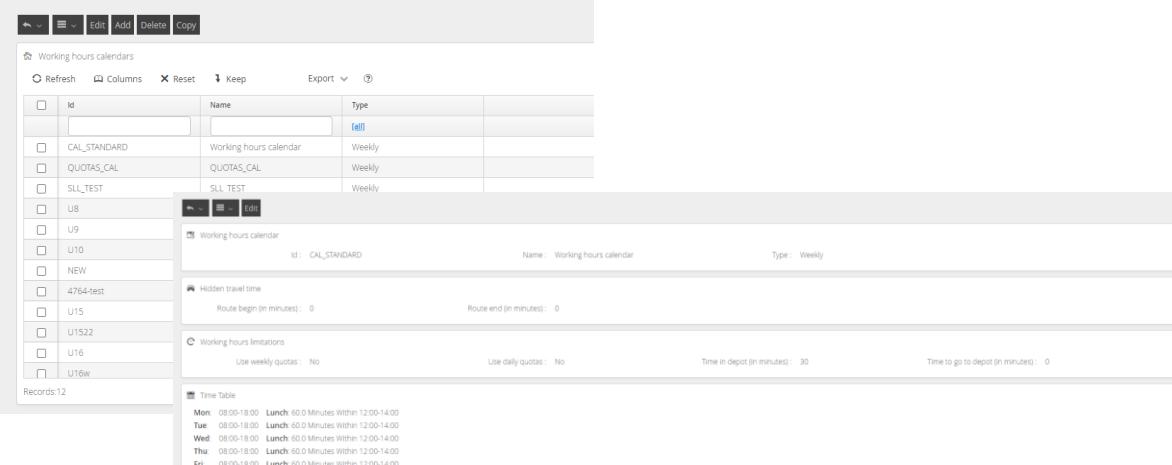
Records:3

Using the Edit button will allow you to add, update or remove entries for the Calendar. NOTE: Adding or amending values in this calendar will affect availability for your workers.

Working Hours Calendar

Clicking on the Working Hours Calendar options will display all currently configured Working Hours Calendars. Clicking on any currently configured calendar will display it's current configuration.

Working hours calendars



The screenshot shows the 'Working hours calendars' interface. At the top, there are buttons for Refresh, Columns, Reset, Keep, Export, and a search bar. Below is a table with columns for Id, Name, and Type. Several entries are listed: 'CAL_STANDARD' (Working hours calendar, Weekly), 'QUOTAS_CAL' (Working hours calendar, Weekly), 'SLL_TEST' (SLL TEST, Weekly), and others like 'U8', 'U9', 'U10', 'NEW', '4764-test', 'U15', 'U1522', 'U16', 'U16w'. The bottom shows 'Records:12'.

Working hours calendar (CAL_STANDARD):

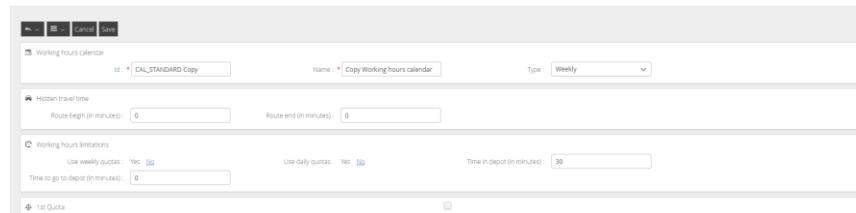
- Route begin (in minutes):** 0
- Route end (in minutes):** 0
- Time Table:**
 - Mon: 08:00-18:00 Lunch: 60.0 Minutes Within 12:00-14:00
 - Tue: 08:00-18:00 Lunch: 60.0 Minutes Within 12:00-14:00
 - Wed: 08:00-18:00 Lunch: 60.0 Minutes Within 12:00-14:00
 - Thu: 08:00-18:00 Lunch: 60.0 Minutes Within 12:00-14:00
 - Fri: 08:00-18:00 Lunch: 60.0 Minutes Within 12:00-14:00

Add/Edit/Copy

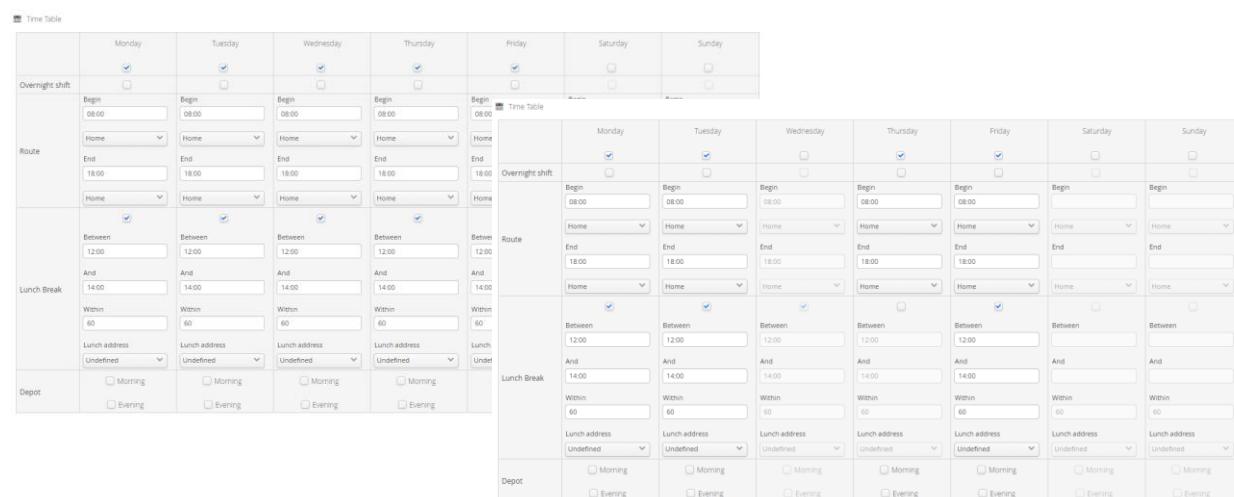
Using the Add, Edit or Copy options will allow you to Create a new Calender or Edit an existing calendar. In all cases, this screen will be displayed.

Working hours calendar

Page | 64



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.



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

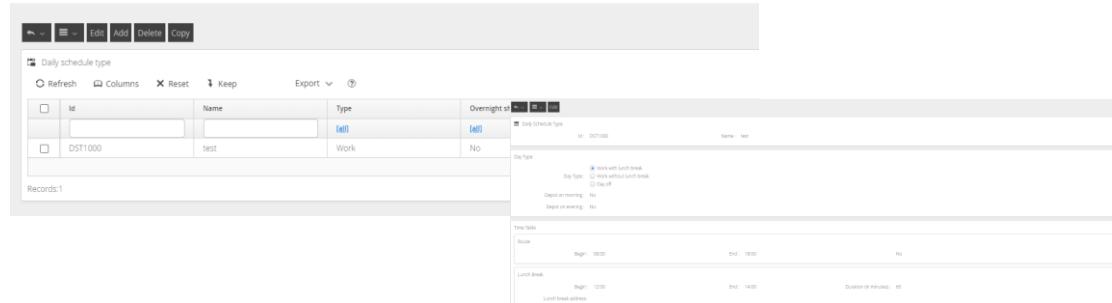
Delete

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

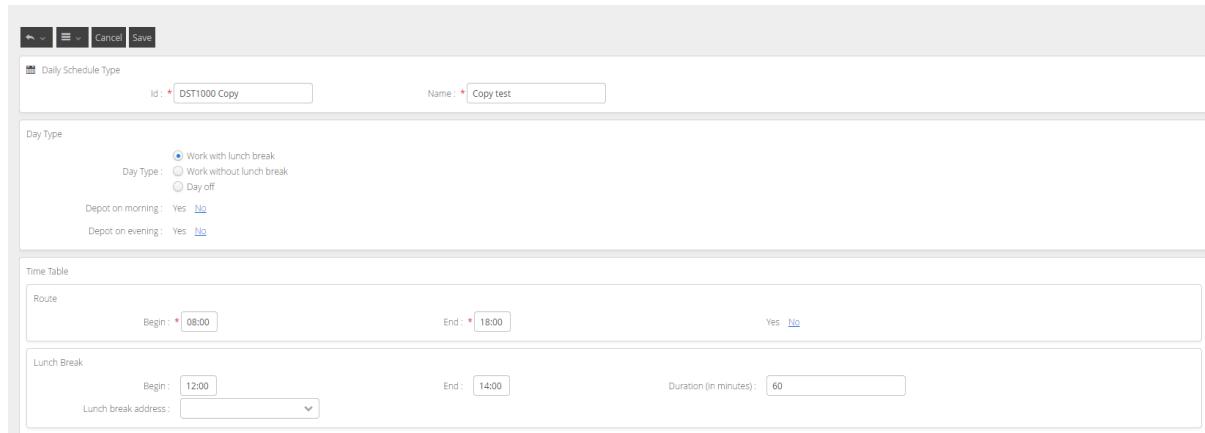


Add/Edit/Copy

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

Daily schedule type

Page | 65



Daily Schedule Type

Day Type

Day Type : Work with lunch break
 Work without lunch break
 Day off

Depot on morning : Yes [No](#)

Depot on evening : Yes [No](#)

Time Table

Route

Begin: * 08:00 End: * 18:00 Yes [No](#)

Lunch Break

Begin: 12:00 End: 14:00 Duration (in minutes): 60

Lunch break address:

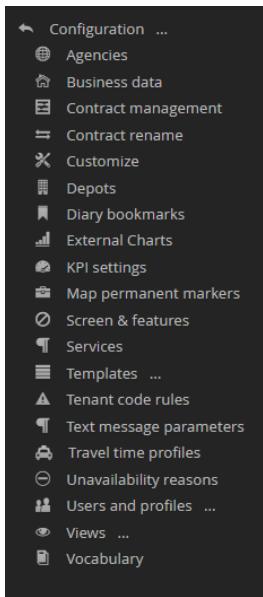
Complete the values as previously and select Save.

Delete

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

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.

Cancel Save

Agency

Id: Xmbrace **Name:** **Description:**

Calendars

Day off calendar: **Working hours calendar:**

Geographical selected values

AB
 AL
 B
 BA
 BB
 BD
 BH
 BL
 BN
 RR

Address

WD25 8HP United Kingdom 51 665944229378-0 3636668179967 [Edit](#) [Map](#)

Once your amendments are complete. Click Save.

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

Delete

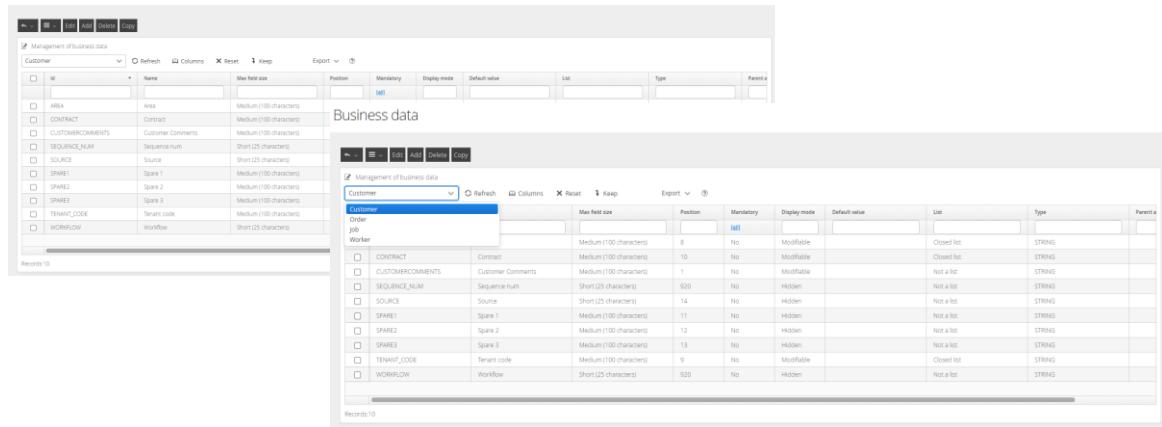
Delete will remove the selected Agency. This function cannot be reversed.

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

Page | 68

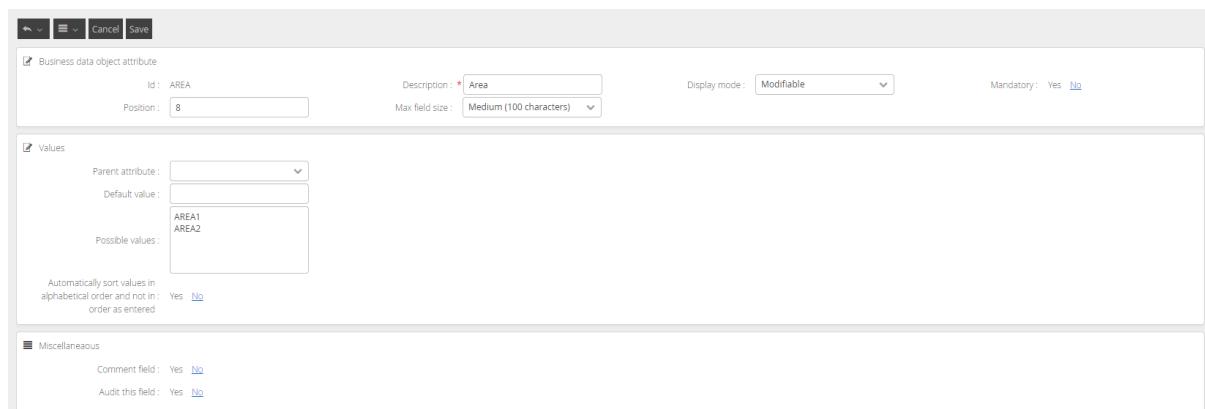


The screenshot shows two tables side-by-side. The left table is titled 'Management of business data' and lists various object types with their descriptions and field sizes. The right table is titled 'Business data' and shows a subset of these objects with additional columns for 'Position', 'Mandatory', 'Display mode', 'Default value', 'List', 'Type', and 'Parent'. Both tables have a 'Customer' dropdown in the header and a 'List' button.

Object	Description	Max field size	Position	Mandatory	Display mode	Default value	List	Type	Parent
AREA	Area	Medium (100 characters)		No	Modifiable		Closed list	STRING	
CONTRACT	Contract	Medium (100 characters)		No	Modifiable		Closed list	STRING	
CUSTOMERCOMMENTS	Customer Comments	Medium (100 characters)		No	Modifiable		Not a list	STRING	
SEQUENCE_NUM	Sequence num	Short (25 characters)		No	Hidden		Not a list	STRING	
SOURCE	Source	Short (25 characters)		No	Hidden		Not a list	STRING	
SPARE1	Spare 1	Medium (100 characters)		No	Hidden		Not a list	STRING	
SPARE2	Spare 2	Medium (100 characters)		No	Hidden		Not a list	STRING	
SPARE3	Spare 3	Medium (100 characters)		No	Hidden		Not a list	STRING	
TENANT_CODE	Tenant code	Medium (100 characters)		No	Modifiable		Closed list	STRING	
WORKFLOW	Workflow	Short (25 characters)		No	Hidden		Not a list	STRING	

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 a configuration screen for an 'AREA' object. It includes fields for 'Id' (AREA), 'Position' (8), 'Description' (Area), 'Max field size' (Medium (100 characters)), 'Display mode' (Modifiable), and 'Mandatory' (Yes). The 'Values' section allows setting a 'Default value' (AREA1) and a list of 'Possible values' (AREA1, AREA2). The 'Miscellaneous' section includes 'Comment field' (Yes) and 'Audit this field' (Yes).

When your 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.

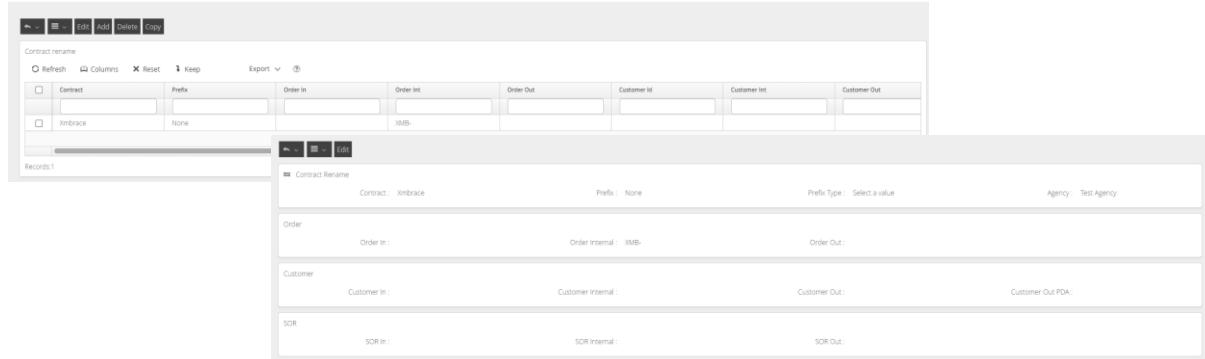
Contract Rename

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.

Page | 69

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

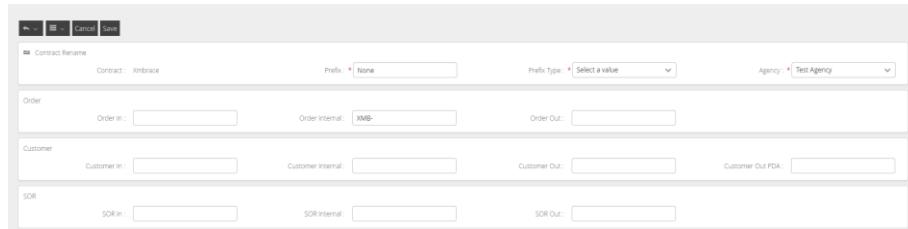
Contract rename list



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



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.

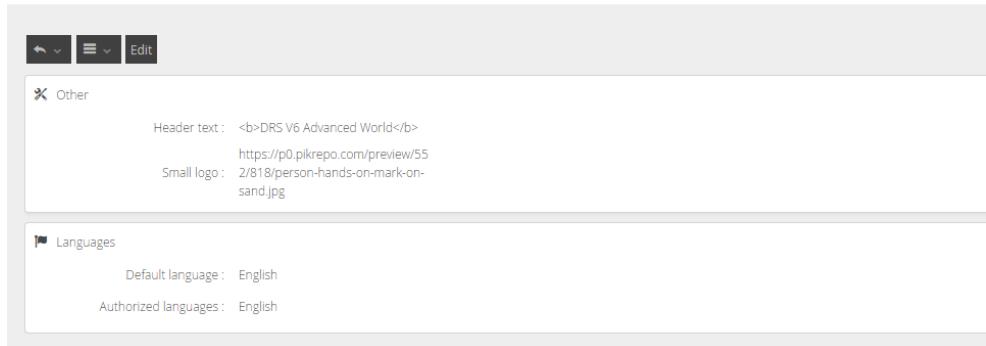
Page | 70



DRS V6 Advanced World

Clicking Edit will allow you to make changes.

Customize



The screenshot shows a 'Customize' interface with two main sections: 'Other' and 'Languages'.

Other:

- Header text: DRS V6 Advanced World
- Header URL: <https://p0.pikrepo.com/preview/552/818/person-hands-on-mark-on-sand.jpg>
- Small logo:  [https://p0.pikrepo.com/preview/552/818/person-hands-on-mark-on-sand.jpg](#)

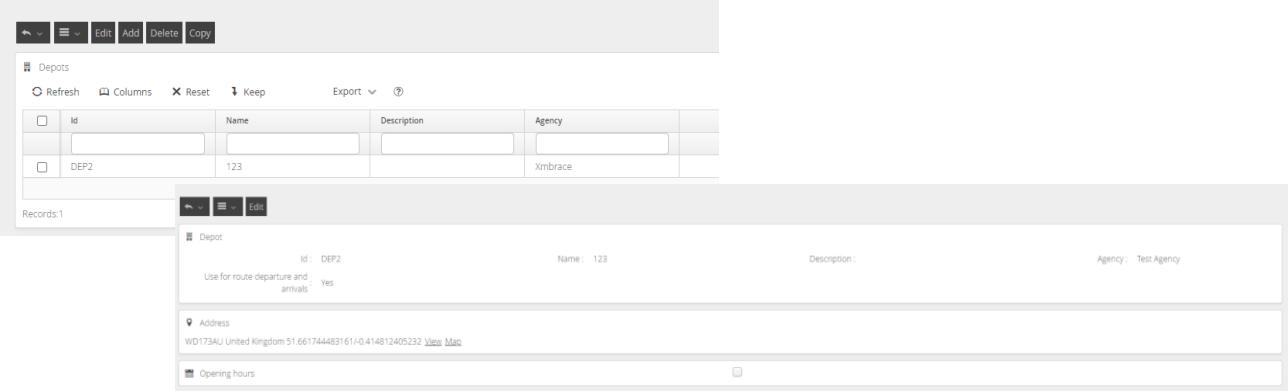
Languages:

- Default language: English
- Authorized languages: 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.

Page | 71



The screenshot shows a software interface for managing depots. At the top, there is a toolbar with buttons for Back, Forward, Refresh, Columns, Reset, Keep, Export, and Help. Below the toolbar is a table titled 'Depots' with columns for Id, Name, Description, and Agency. A single row is visible, showing Id: DEP2, Name: 123, Description: Xmbrace, and Agency: Test Agency. Below the table, a message says 'Records:1'. A large 'Edit' button is present. The bottom half of the screen shows a detailed view of a single depot. It includes fields for Id (DEP2), Name (123), Description (empty), and Agency (Test Agency). It also shows a checkbox for 'Use for route departure and arrivals' which is checked (Yes). Below this is an 'Address' section with a map icon and a link to 'View Map' for the address 'WD173AU United Kingdom 51.661744483161/-0.414812405232'. At the bottom is an 'Opening hours' section with a map icon and a checkbox.

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 a configuration screen for a depot. At the top, there are buttons for Back, Forward, Cancel, and Save. The main area is titled 'Depot' and contains fields for 'Id' (DEP2 (copy)), 'Name' (123), 'Description' (empty), and 'Agency' (Test Agency). Below these fields is a checkbox for 'Use for route departure and arrivals' with 'Yes' selected. There is also an 'Address' section with a map icon and a link to 'View Map' for the address 'WD173AU United Kingdom 51.661744483161/-0.414812405232'. At the bottom is an 'Opening hours' section with a map icon and a checkbox.

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

Delete

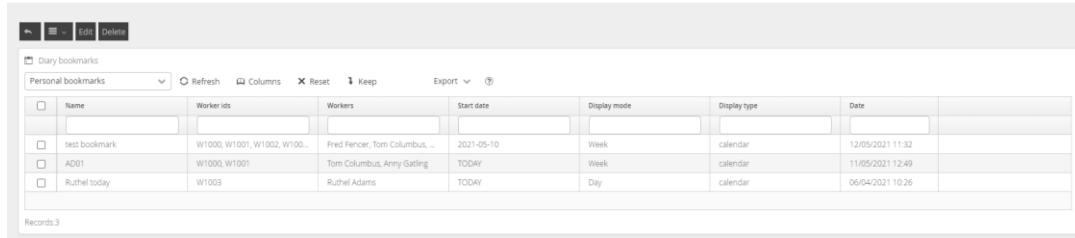
Delete will remove an object from the configuration. This function cannot be undone.

Diary Bookmarks

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

Diary bookmarks

Page | 72



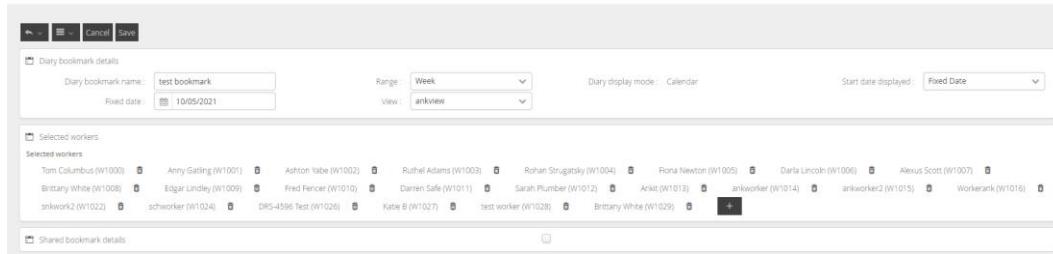
Name	Workerids	Workers	Start date	Display mode	Display type	Date
test bookmark	W1000, W1001, W1002, W100...	Fred Fencer, Tom Columbus, ...	2021-05-10	Week	calendar	12/05/2021 11:32
AD01	W1000, W1001	Tom Columbus, Amy Garling	TODAY	Week	calendar	11/05/2021 12:49
Ruthel today	W1003	Ruthel Adams	TODAY	Day	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) Amy Garling (W1001) Ashton Yabe (W1002) Ruthel Adams (W1003) Rohan Snugatsky (W1004) Rona Newton (W1005) Darla Lincoln (W1006) Alexus Scott (W1007) Brittany White (W1008) Edgar Lindley (W1009) Fred Fencer (W1010) Darren Safe (W1011) Sarah Plumber (W1012) Arik (W1013) ankworker (W1014) ankworker2 (W1015) Workerank (W1016) smkworker2 (W1022) schworker (W1024) DR5-4596 Test (W1026) Katie 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

Chart list		
	Name	URI: external chart
<input type="checkbox"/>		
Records:0		

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

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

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: Host:
 Trusted Hosts: Hosts:

Save Advanced Config

Close & Start Dashboard Service

Dashboard Configuration

Licence Tomcat Ports Security Repository

Reload last used security settings Reload security default settings

Embedding

Enable Windows Authentication

X Frame Host: Custom X Frame Host:
 Trusted Hosts: Custom Trusted Hosts:

Cookies

Secure (You are using https) Same-Site:

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.

Page | 75

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

Chart popup + X

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

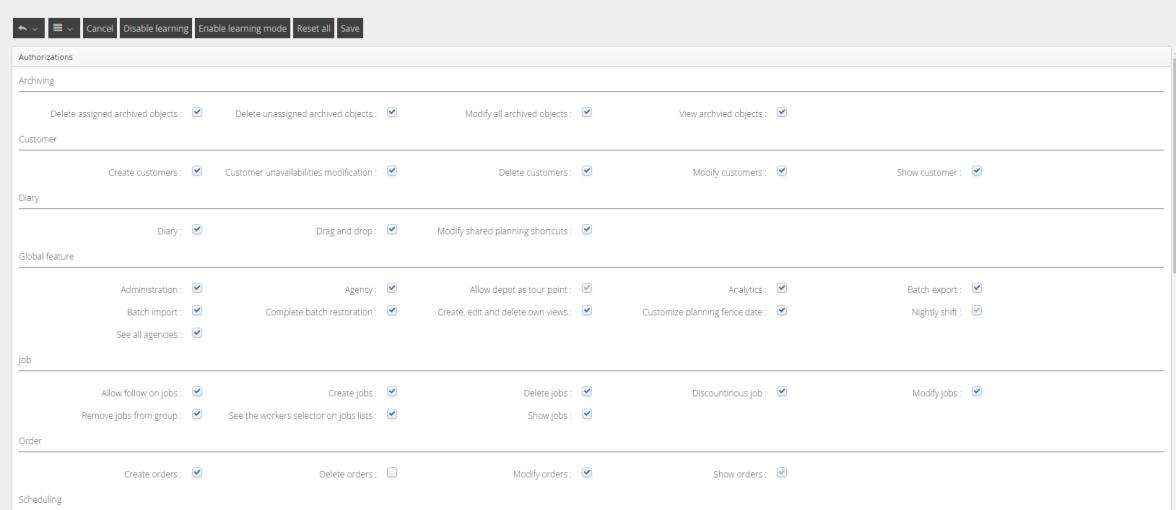
The Screens and Features function allows you to globally disable functions, buttons, options and fields for all profiles.

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

Review the Inheritance section in this document for more information.

Page | 77

Screen configuration



The screenshot shows the 'Screens and Features' configuration page. At the top, there are buttons for 'Save', 'Reset all', and 'Cancel'. Below this, there are several sections with checkboxes:

- Customer:** Delete assigned archived objects, Delete unassigned archived objects, Modify all archived objects, View archived objects.
- Diary:** Create customers, Customer unavailabilities modification, Delete customers, Modify customers, Show customer.
- Global feature:** Administration, Agency, Allow depot as tour point, Analytics, Batch export, Batch import, Complete batch restoration, Create, edit and delete own views, Customize planning fence date, Nightly shift, See all agencies.
- Job:** Allow follow on jobs, Create jobs, Delete jobs, Discontinuous job, Modify jobs, Remove jobs from group, See the workers selector on jobs lists, Show jobs.
- Order:** Create orders, Delete orders, Modify orders, Show orders.
- Scheduling:** (No visible checkboxes in this section)

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

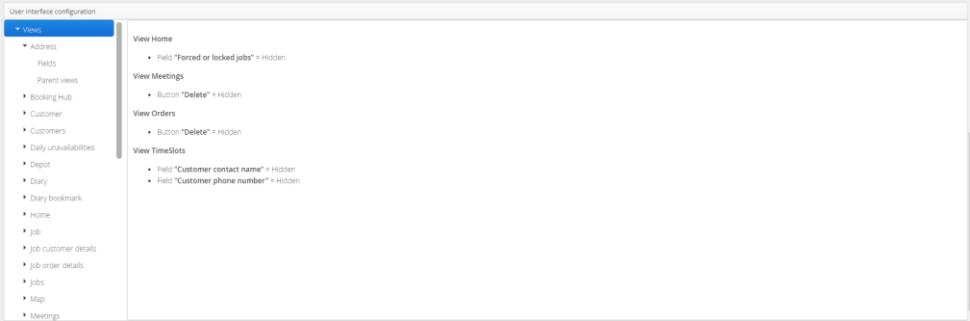
Reset All: Reset All will reset all settings within Screens and Features back to factory defaults.

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.



The screenshot shows the 'User Interface Configuration' interface. The left sidebar has a tree view of views:

- Address
- Booking Hub
- Customer
- Daily unavailabilities
- Depot
- Diary
- Diary bookmark
- Home
- Job
- Job customer details
- Job order details
- Jobs
- Map
- Meetings

The right panel shows specific configuration for different views:

- View Home:**
 - Field "Forced or locked jobs" = Hidden
 - Button "Delete" = Hidden
- View Orders:**
 - Button "Delete" = Hidden
- View TimeSlots:**
 - Field "Customer contact name" = Hidden
 - Field "Customer phone number" = Hidden

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 attempt to make where this value doesn't have a default will fail.

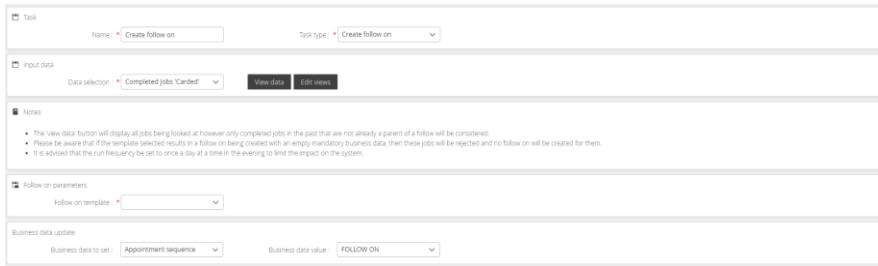
Services

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

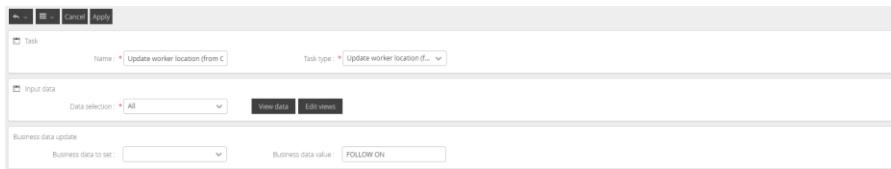
The Auto-Create Follow On service will create a new Job Object for all identified jobs. These Job Objects will be created as Follow On's to the parent Job.



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.



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

Templates

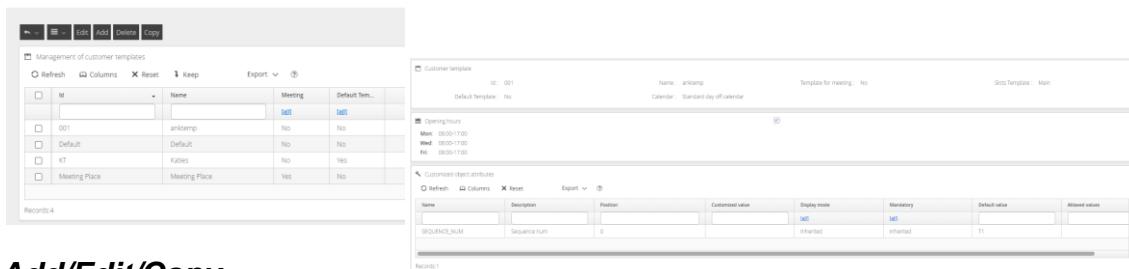
All Templates are collected for configuration under the Template option. Expanding this option will display all configurable options.

Page | 79

Customer

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

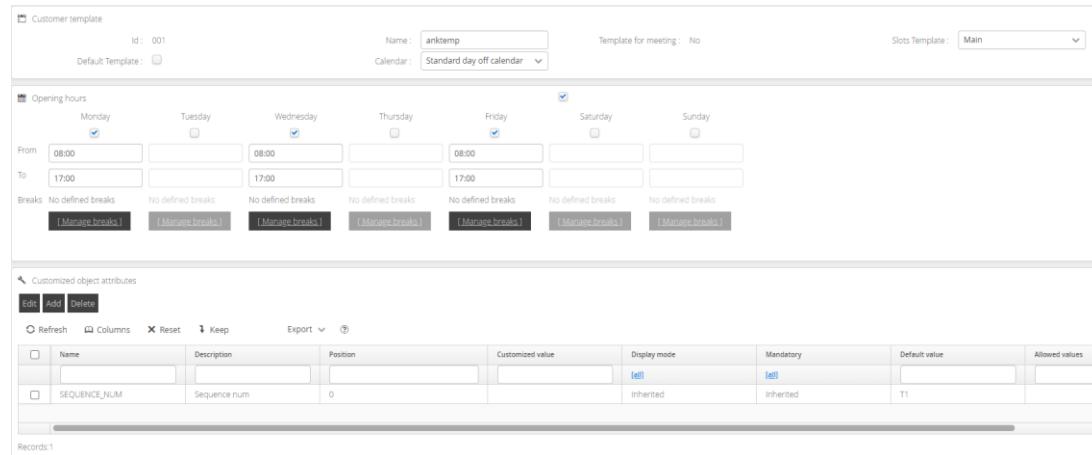
Customer templates



The screenshot shows the 'Customer templates' screen. On the left, a list of templates is displayed with columns for ID, Name, Meeting, and Default Temp. The 'anktemp' template is selected. On the right, a detailed view of the 'anktemp' template is shown, including its ID (001), name (anktemp), calendar (Standard day off calendar), and other configuration details. Below this, a 'Customized object attributes' section is visible.

Add/Edit/Copy

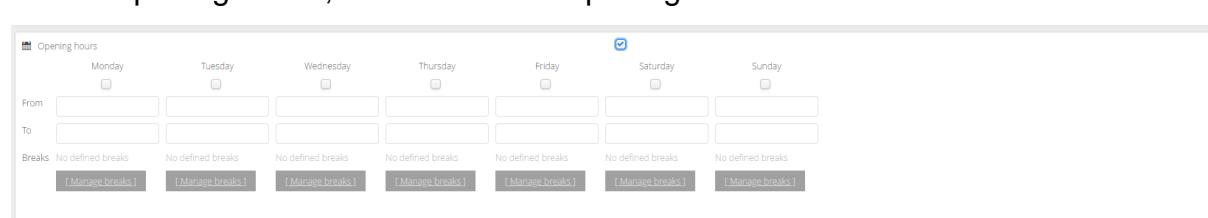
Add, Edit or Copy will allow you to Create or Modify a Location Template. In all cases, the following screen will be displayed. Some of your fields may be pre-populated.



The screenshot shows the 'Customer template' configuration screen. At the top, template details are set: ID (001), Name (anktemp), Calendar (Standard day off calendar), and Slots Template (Main). The 'Opening hours' section is expanded, showing a 7-day grid for setting work hours. The 'Customized object attributes' section is also visible at the bottom.

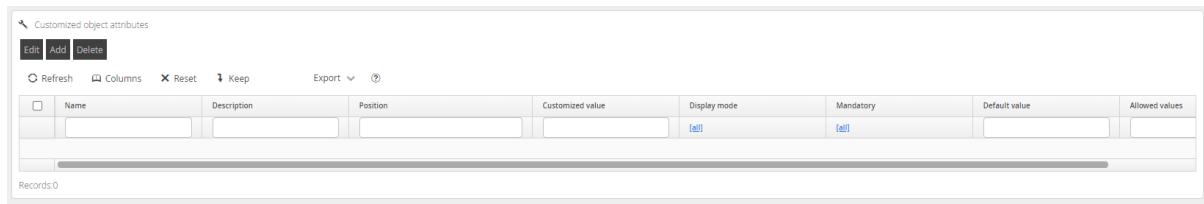
Set the appropriate Template details, ID, Name etc.

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



The screenshot shows the 'Opening hours' configuration screen. It displays a 7-day grid for setting work hours. The 'From' and 'To' fields are present for each day, and a 'Breaks' section with 'No defined breaks' and a 'Manage breaks' button is shown for each day.

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.



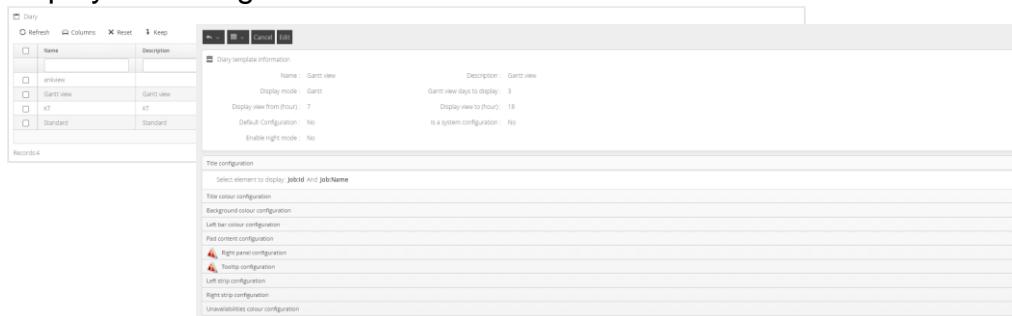
Page | 80

Delete

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

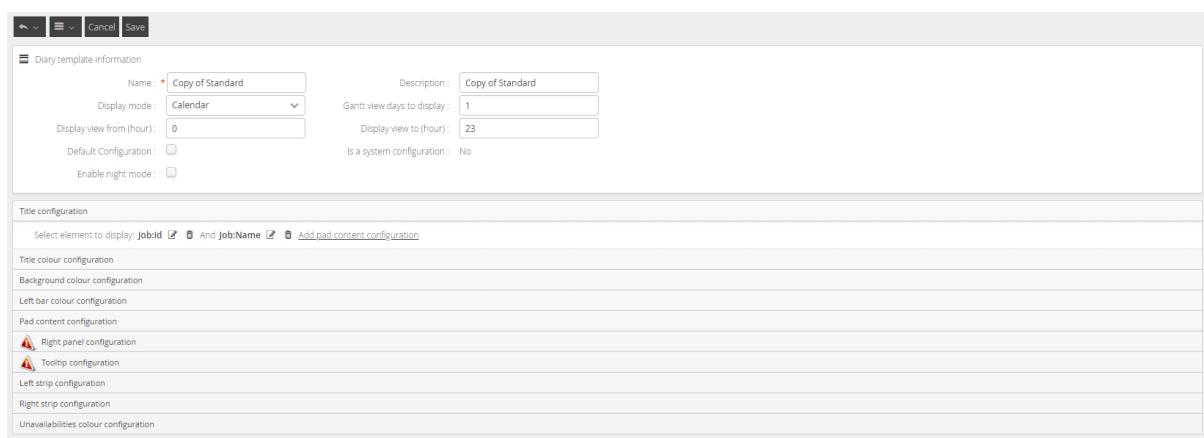
Diary

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.

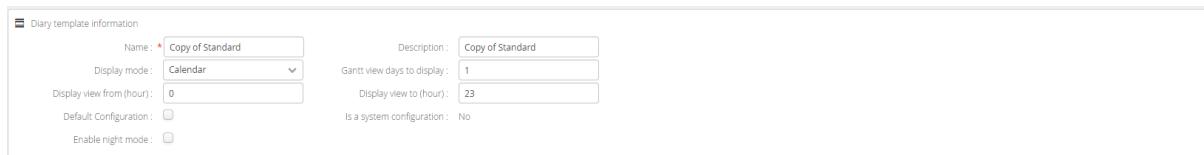


Add/Edit/Copy

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.



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



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 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

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

Management of follow on job templates

[Refresh](#) [Export](#)

<input type="checkbox"/>	Template name	Description	Default temp...
<input type="checkbox"/>	Auto 3	Auto 3	Name : default Allow on completed order : No Allow duration change : Yes Allow job template changes : Yes Calculation new job duration : From parent job Job status allowed : Accepted, Completed, Despatched, Planned, Started, Acknowledged
<input type="checkbox"/>	Auto 4	Auto 4	
<input type="checkbox"/>	Auto 5	Auto 5	
<input type="checkbox"/>	Auto2	Auto2	
<input type="checkbox"/>	default	default	

Records:5

Follow on job template

Name	Description	Data source	Customized value	Display mode	Allowed values	Mandatory	Position
ACTION_TAKEN	Action taken	customized		Hidden		Inherited	0
APPOINTMENT_REASON	Appointment reason	customized		FOLLOW ON		Inherited	0
APPOINTMENT_SEQUENCE	Appointment sequence	customized		FOLLOW ON		Inherited	1
BOOKING_SUB_TYPE	Booking sub type	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
JOBREADY	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: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.

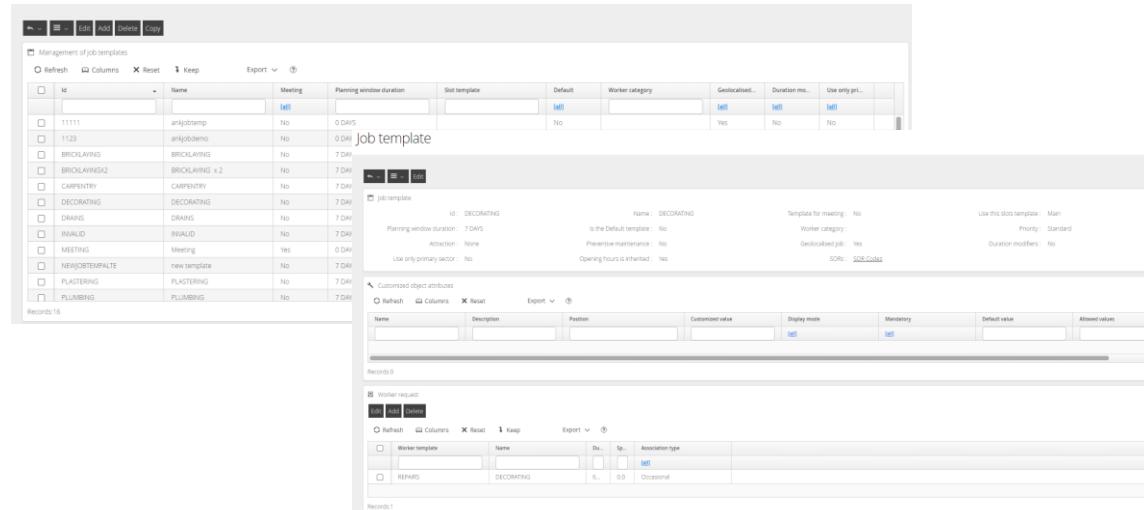
Page | 82

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.

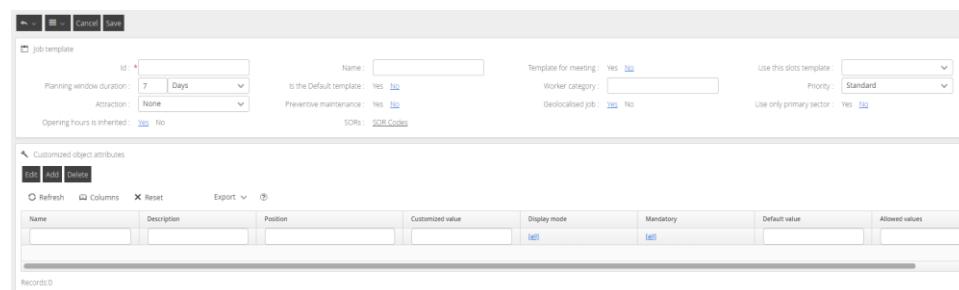
Job templates



The screenshot shows the 'Management of job templates' screen. At the top, there are buttons for Refresh, Columns, Reset, Keep, Export, and a search field. Below is a table with columns: Id, Name, Meeting, Planning window duration, Slot template, Default, Worker category, Geolocated, Duration ms., and Use only pri... The table lists several templates, including '11111', '1123', 'ankjobtemp', 'ankjobdemo', 'BROKLAYING', 'BROKLAYING x 2', 'CARPENTRI', 'DECORATING', 'DRAINS', 'INVALID', 'INVALID', 'MEETING', 'NEWWORKTEMPALTE', 'PLASTERING', and 'PLUMBING'. The 'DECORATING' template is selected, and a detailed view is shown in the center. The detailed view includes fields for Name (DECORATING), Planning window duration (7 DAYS), Is the Default template (No), Worker category (None), Preventive maintenance (No), Geolocated job (Yes), and SORs (S001 Codes). Below the main table is a 'Customized object attributes' section with buttons for Add, Edit, and Delete, and a table for 'Customized object attributes' with columns: Name, Description, Position, Customized value, Display mode, Mandatory, Default value, and Allowed values. The 'Customized object attributes' table is currently empty.

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.



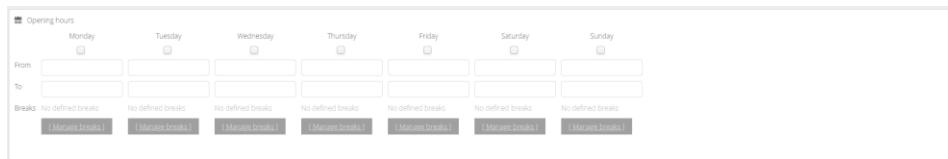
The screenshot shows the 'Job template' configuration screen. At the top, there are buttons for Refresh, Columns, Reset, Keep, Export, and a search field. Below is a table with columns: Id, Name, Planning window duration, Is the Default template, Worker category, Preventive maintenance, Geolocated job, Duration ms., and Use this slots template. The 'Name' field is populated with 'DECORATING'. The 'Planning window duration' dropdown shows '7 Days'. The 'Is the Default template' dropdown shows 'No'. The 'Worker category' dropdown shows 'None'. The 'Preventive maintenance' dropdown shows 'No'. The 'Geolocated job' dropdown shows 'Yes'. The 'Duration ms.' dropdown shows '0.0'. The 'Use this slots template' dropdown shows 'Standard'. Below the table is a 'Customized object attributes' section with buttons for Add, Edit, and Delete, and a table for 'Customized object attributes' with columns: Name, Description, Position, Customized value, Display mode, Mandatory, Default value, and Allowed values. The 'Customized object attributes' table is currently empty.

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



The screenshot shows the 'Job template' configuration screen. At the top, there are buttons for Refresh, Columns, Reset, Keep, Export, and a search field. Below is a table with columns: Id, Name, Planning window duration, Is the Default template, Worker category, Preventive maintenance, Geolocated job, Duration ms., and Use only primary sector. The 'Name' field is populated with 'DECORATING'. The 'Planning window duration' dropdown shows '7 Days'. The 'Is the Default template' dropdown shows 'No'. The 'Worker category' dropdown shows 'None'. The 'Preventive maintenance' dropdown shows 'No'. The 'Geolocated job' dropdown shows 'Yes'. The 'Duration ms.' dropdown shows '0.0'. The 'Use only primary sector' dropdown shows 'Yes'. Below the table is a 'Customized object attributes' section with buttons for Add, Edit, and Delete, and a table for 'Customized object attributes' with columns: Name, Description, Position, Customized value, Display mode, Mandatory, Default value, and Allowed values. The 'Customized object attributes' table is currently empty.

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.



Page | 83

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



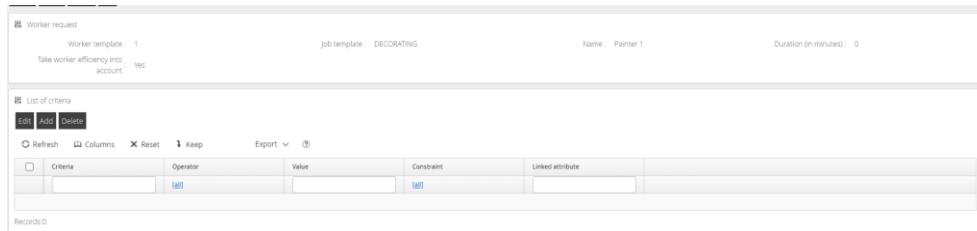
When you Save the Template detail, this will then show you the Worker Request option.



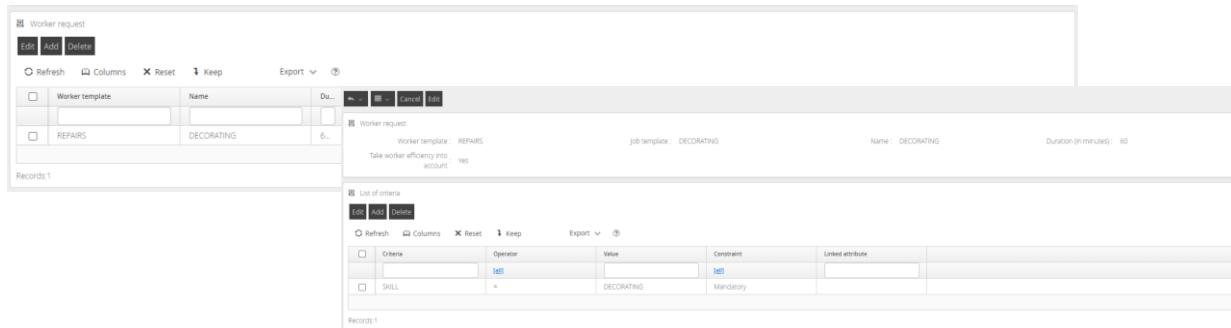
Clicking Add will allow you to Add a new Worker Request.



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

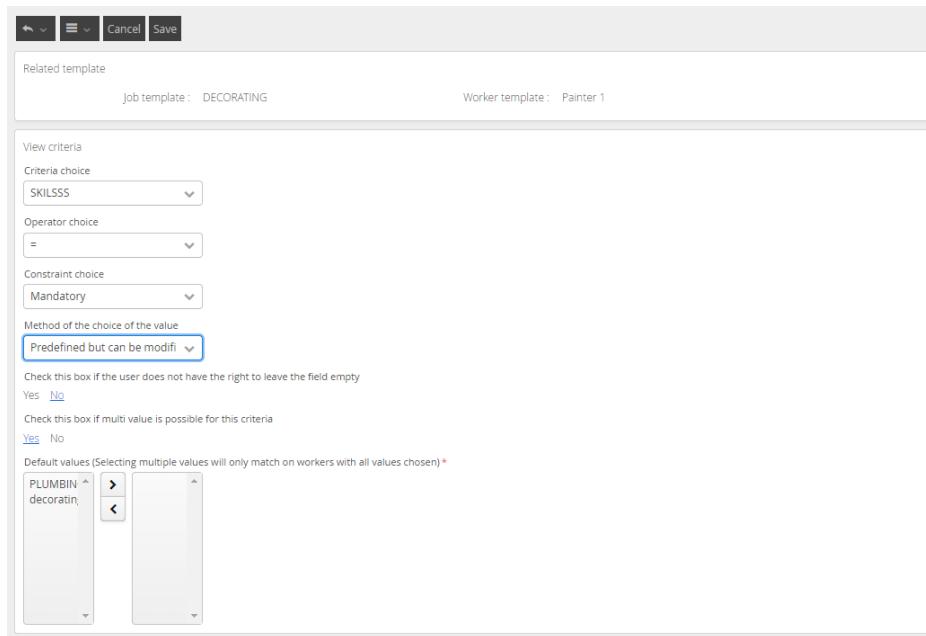


If there is a preconfigured request, clicking on the request will display the configured detail.



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.

Page | 84



Related template

Job template : DECORATING Worker template : Painter 1

View criteria

Criteria choice: SKILSSS

Operator choice: =

Constraint choice: Mandatory

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

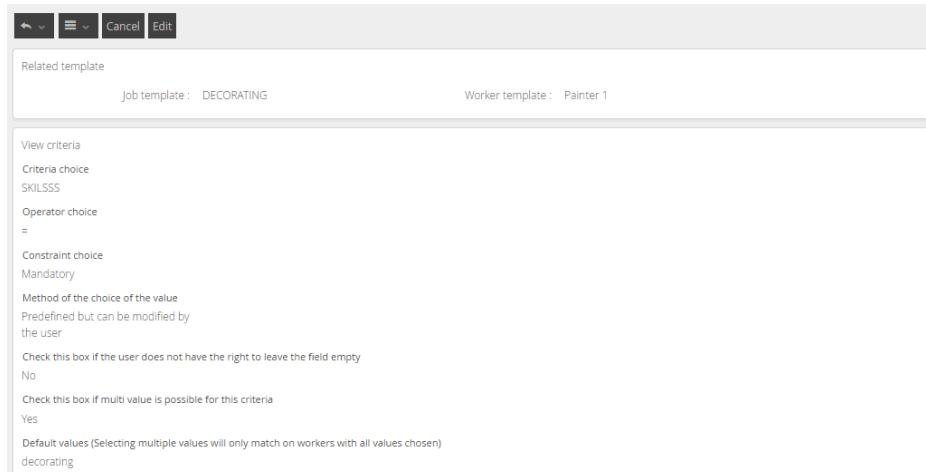
Check this box if the user does not have the right to leave the field empty: Yes No

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
- decoratin.

Set your options appropriately and click SAVE.



Related template

Job template : DECORATING Worker template : Painter 1

View criteria

Criteria choice: SKILSSS

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):

- decoratin.

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

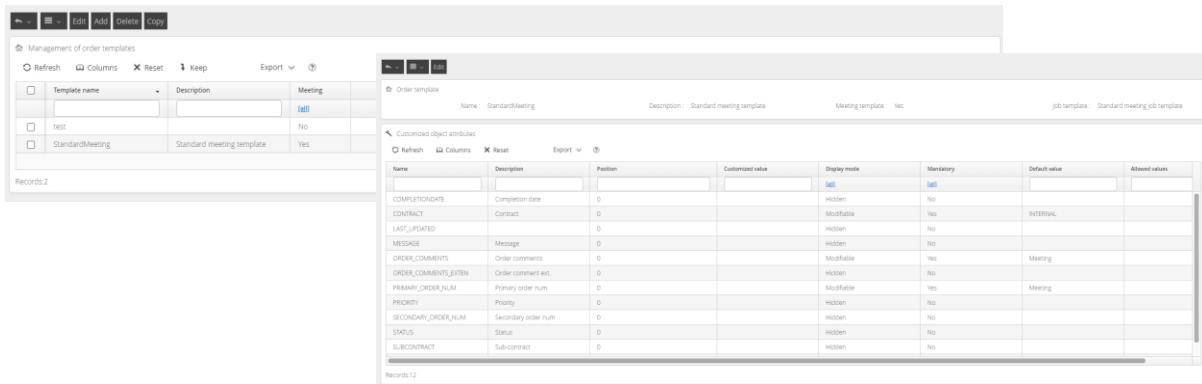
Delete will remove the selected Object. This action is not reversible.

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.

Page | 85



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.



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.

Page | 86

Once complete, click Save to commit your changes.

Delete

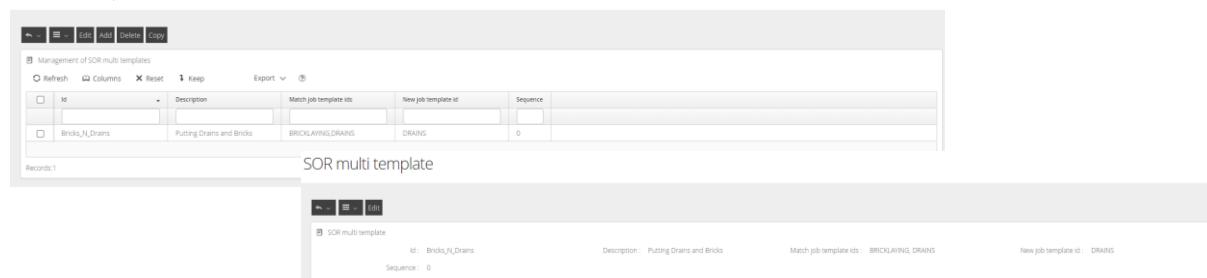
Delete will remove the selected Object. This action is not reversible.

SOR Multi

Multi 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.

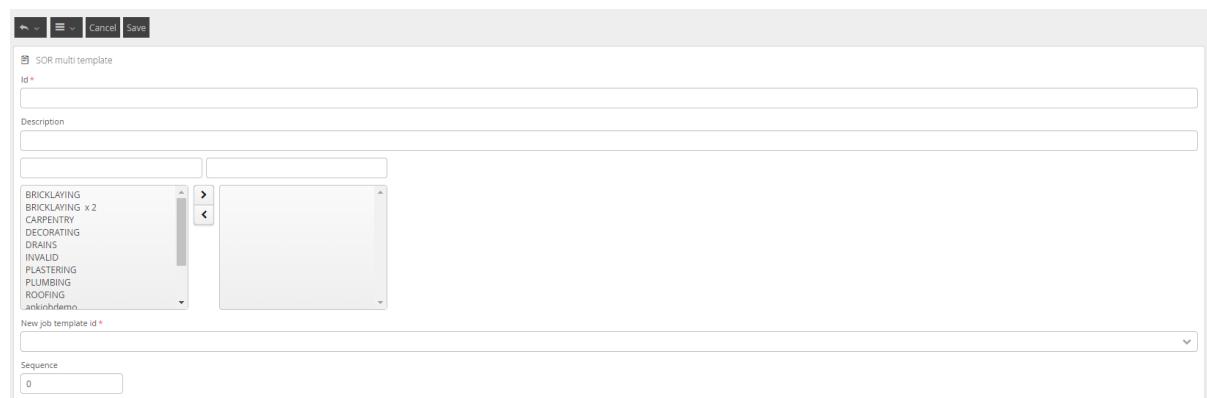
Clicking into this menu will display the currently configured MultiTemplates. Clicking on any listed option will display the configured details.

SOR multi templates



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.



- 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.

Page | 87

Once you have completed your changes, click Save.

Delete

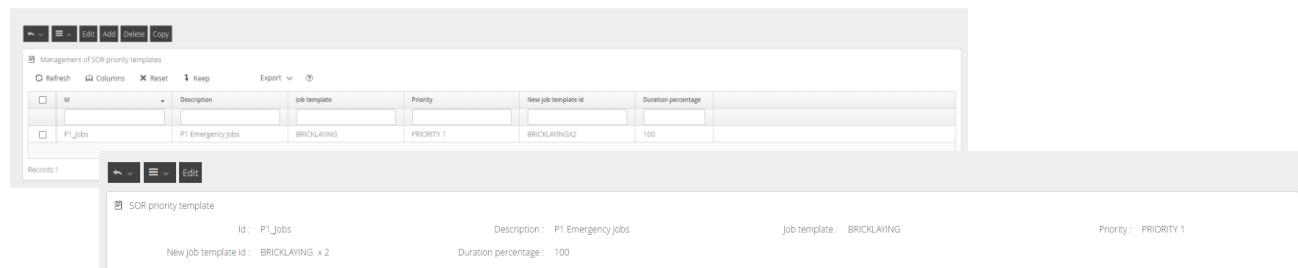
Delete will remove the selected Object. This action is not reversible.

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



The screenshot shows a list view of Priority Templates. The table has columns: ID, Description, Job template, Priority, New job template id, and Duration percentage. One row is selected, showing ID: P1_Jobs, Description: P1 Emergency jobs, Job template: BRICKLAYING, Priority: PRIORITY 1, New job template id: BRICKLAYING, and 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



The screenshot shows an edit view for a Priority Template. It has fields for ID (P1_Jobs), Description (P1 Emergency jobs), Job template (BRICKLAYING), Priority (PRIORITY 1), New job template id (BRICKLAYING), and Duration percentage (100).

- 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.

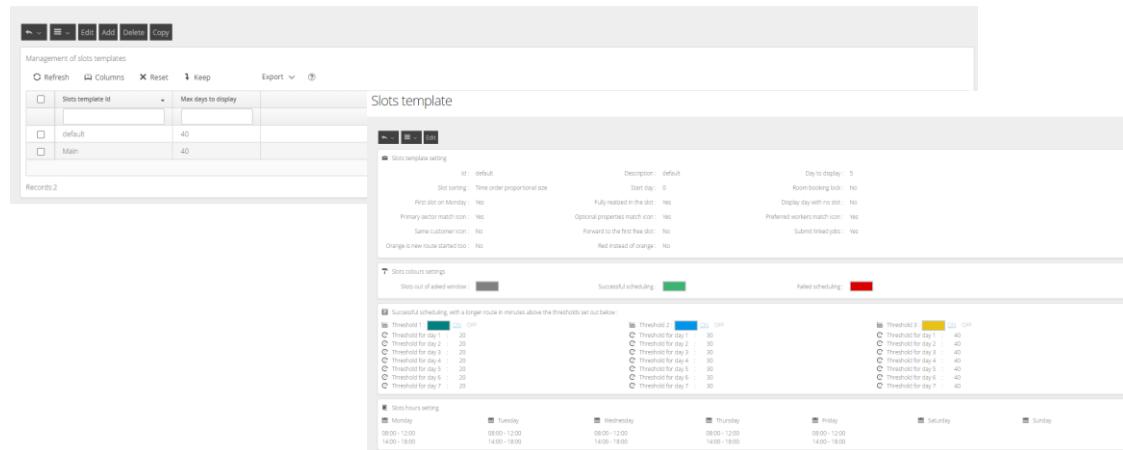
Slot Templates

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.

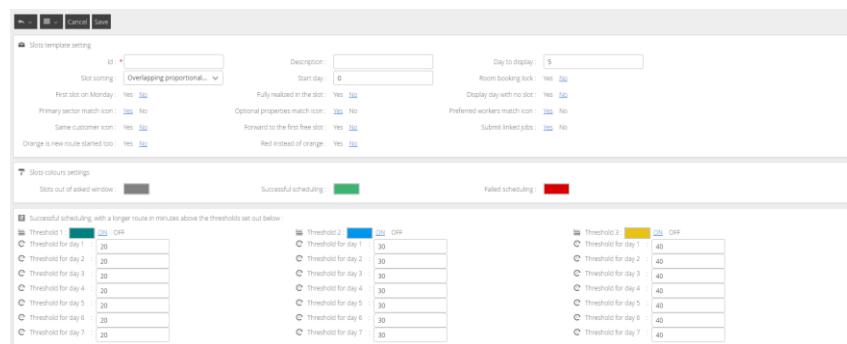
Slots templates



The screenshot shows the 'Management of slot templates' interface. On the left, a list of slot templates is displayed with columns for 'Slot template ID' and 'Max days to display'. Two entries are shown: 'default' (40 days) and 'Main' (40 days). On the right, a detailed configuration view for the 'Slots template' is shown. It includes sections for 'Slot template setting', 'Slot colours', and 'Slot hours setting'. The 'Slot template setting' section shows settings like 'ID: default', 'Description: default', 'Day to display: 5', and various checkboxes for booking logic. The 'Slot colours' section shows color-coded boxes for 'Successful scheduling' (green) and 'Failed scheduling' (red). The 'Slot hours setting' section shows time slots for each day of the week, with specific times and duration markers.

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

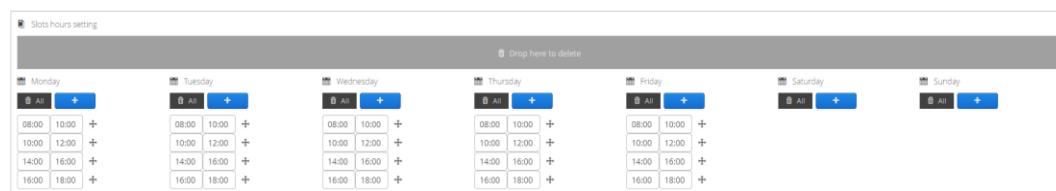
In all cases, a screen similar to the following will be shown.



The screenshot shows the 'Slot template setting' configuration screen. It includes fields for 'ID' (set to 'Overlapping proportional...'), 'Description', 'Day to display', and various checkboxes for booking logic. Below this is a 'Slot colours' section with 'Successful scheduling' and 'Failed scheduling' boxes. At the bottom is a 'Slot hours setting' section showing time slots for each day of the week, with specific times and duration markers.

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.



The screenshot shows the 'Slot hours setting' interface. It displays a grid of time slots for each day of the week. Each day has a header with 'All' and a '+' button. Below each header is a list of time intervals (e.g., 08:00-10:00, 10:00-12:00, etc.) with a '+' button next to each. A 'Drop here to delete' placeholder is visible at the top of the grid.

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.

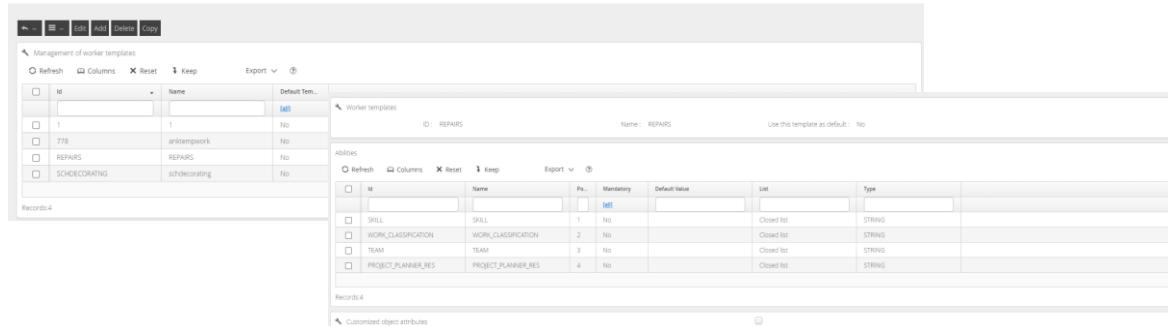
Worker

Page | 89

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

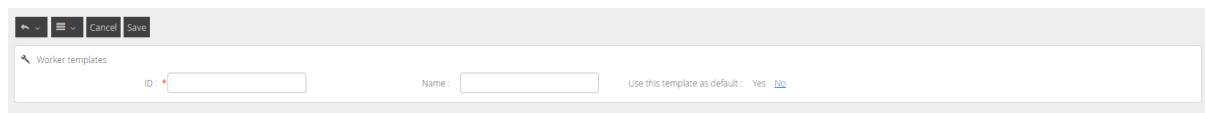


The screenshot shows the 'Management of worker templates' interface. On the left, a list of templates is displayed with columns for Id, Name, and Default. The 'REPAIRS' template is selected, showing its details on the right. The details screen includes fields for Name, ID, Mandatory, Default Value, List, and Type. The 'REPAIRS' template has the following configuration:

M	Name	Po...	Mandatory	Default Value	List	Type
1	REPAIRS	1	No	REPAIRS	Closed list	STRING
2	SKILL	2	No	REPAIRS	Closed list	STRING
3	WORK_CLASSIFICATION	3	No	REPAIRS	Closed list	STRING
4	TEAM	4	No	REPAIRS	Closed list	STRING
5	PROJECT_PLANNER_RES	5	No	REPAIRS	Closed list	STRING

Add/Copy

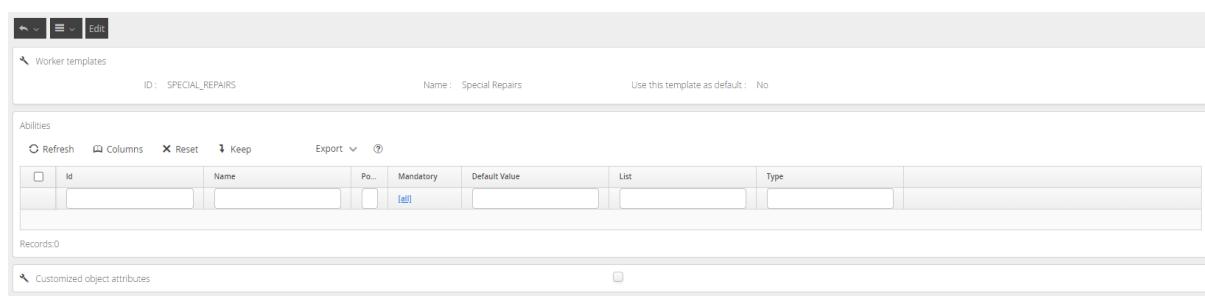
Add or Copy will allow you to create new Worker Template. On selection the following screen will be displayed.



The screenshot shows the 'Worker templates' add/copy screen. It has fields for 'ID' and 'Name'. There is also a checkbox 'Use this template as default' with a 'No' link.

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

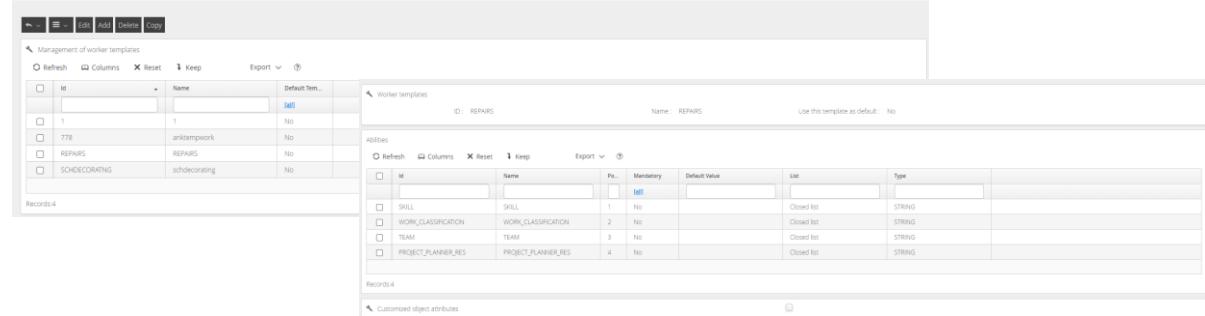
Once complete, click Save. The following screen will be displayed.



The screenshot shows the 'Management of worker templates' screen after saving a new template. The 'SPECIAL_REPAIRS' template is now listed in the list view. The details screen for 'SPECIAL_REPAIRS' shows the configuration:

M	Name	Po...	Mandatory	Default Value	List	Type
1	SPECIAL_REPAIRS	1	No	SPECIAL_REPAIRS	Closed list	STRING

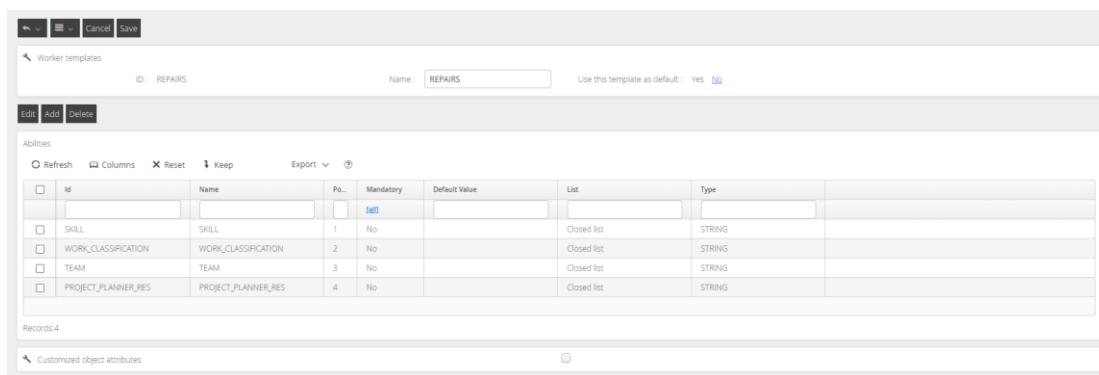
Worker templates



The screenshot shows the 'Management of worker templates' screen. It displays a list of templates and a detailed view of the 'REPAIRS' template. The 'REPAIRS' template configuration is identical to the one shown in the previous screenshot.

Selecting Edit will display this screen.

Page | 90



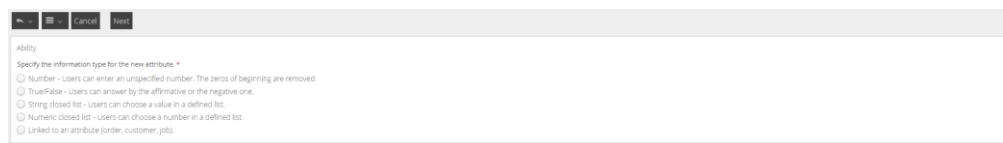
The screenshot shows a table titled 'Abilities' with columns: Id, Name, Po..., Mandatory, Default Value, List, and Type. The table contains four rows with the following data:

Id	Name	Po...	Mandatory	Default Value	List	Type
1	SKILL	1	No		Closed list	STRING
2	WORK_CLASSIFICATION	2	No		Closed list	STRING
3	TEAM	3	No		Closed list	STRING
4	PROJECT_PLANNER_RES	4	No		Closed list	STRING

Records:4

Customized object attributes

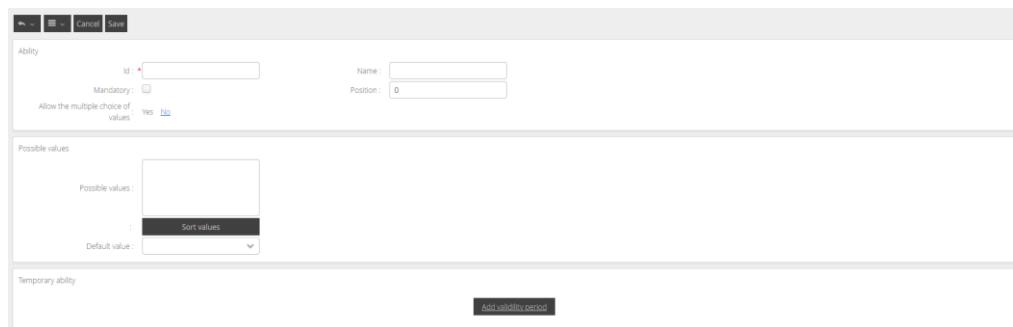
From this screen you can add in abilities to provide scheduling constraints. Add will allow you to add a new ability. Select the Ability Type and click Next.



The screenshot shows a list of options for specifying 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, job).

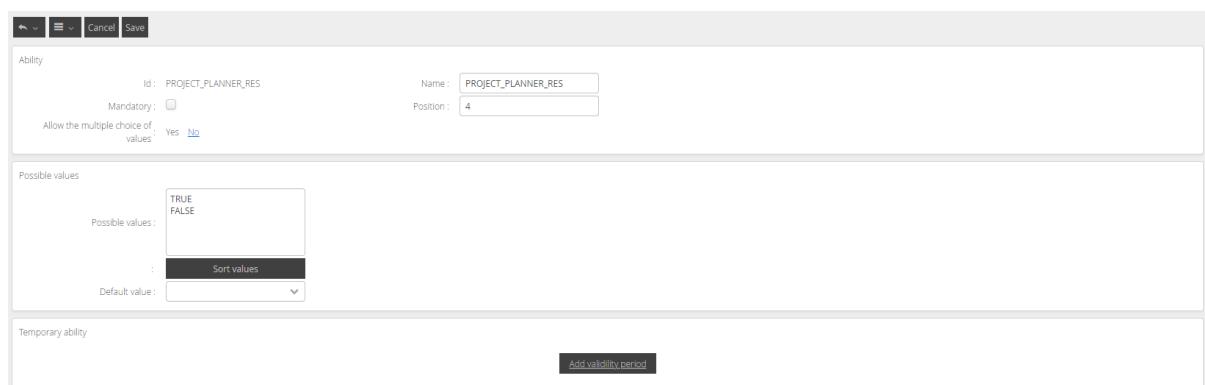
Your available options will be different depending on the object type selected.



The screenshot shows the 'Ability' configuration screen for a specific object type. The 'Ability' section includes fields for Id, Name, Position, Mandatory, and Allow the multiple choice of values. The 'Possible values' section includes fields for Possible values, Sort values, and Default value. The 'Temporary ability' section includes a 'Add validity period' button.

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.



The screenshot shows the 'Ability' configuration screen for modifying an existing ability. The 'Ability' section includes fields for Id, Name, Position, Mandatory, and Allow the multiple choice of values. The 'Possible values' section includes fields for Possible values, Sort values, and Default value. The 'Temporary ability' section includes a 'Add validity period' button.

Complete your modifications and click Save.



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

Ensure you Save the Worker Template once modifications are complete.

Delete

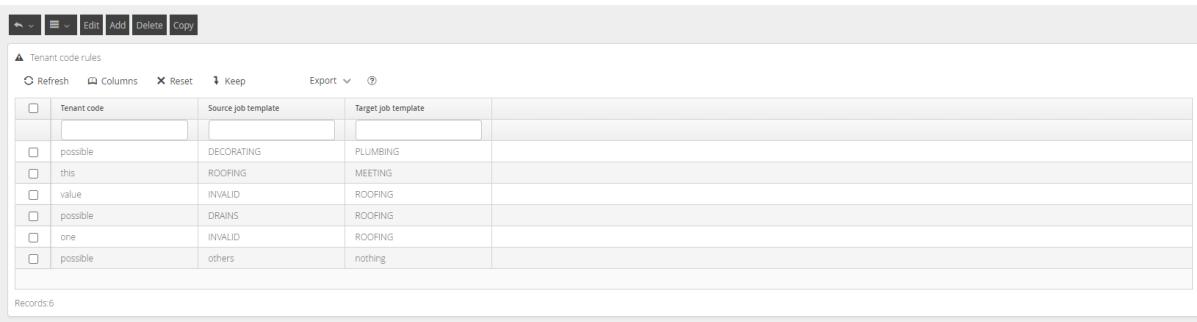
Page | 91

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.

Page | 92

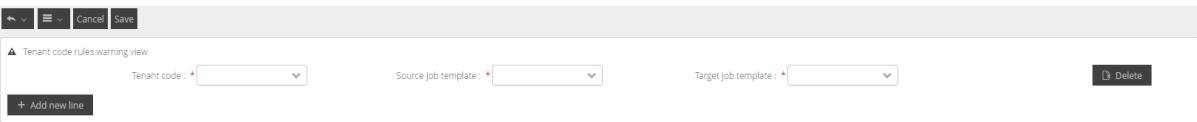


Tenant code	Source job template	Target job template
possible	DECORATING	PLUMBING
this	ROOFING	MEETING
value	INVALID	ROOFING
possible	DRAINS	ROOFING
one	INVALID	ROOFING
possible	others	nothing

Records: 6

Add/Copy

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



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.



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.

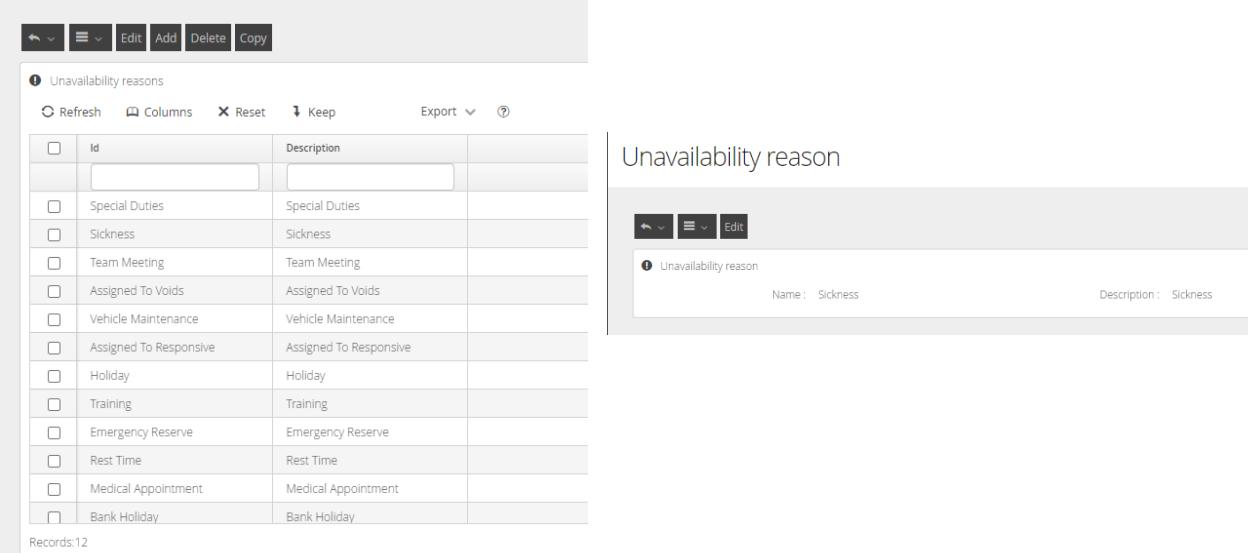
Unavailability Reasons

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.

Page | 93

Unavailability reasons



The screenshot shows two windows side-by-side. The left window is a list of 'Unavailability reasons' with columns for 'Id' and 'Description'. The right window is a detailed view of a single 'Unavailability reason' named 'Sickness'.

	Id	Description
<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

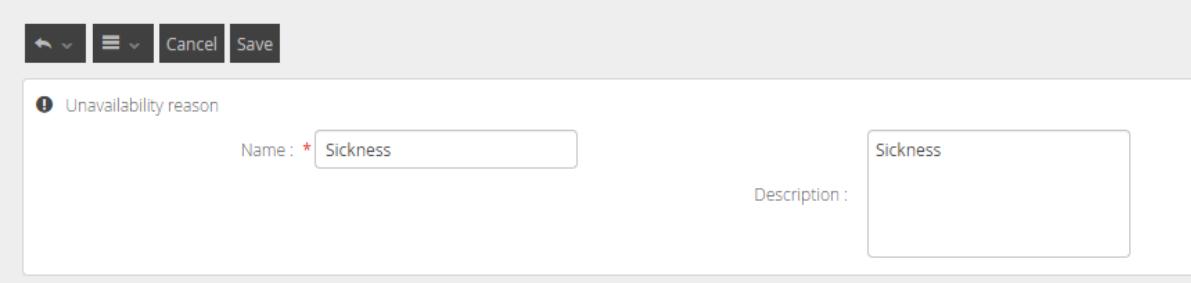
Records:12

Unavailability reason

Name	Description
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



The screenshot shows a dialog box for editing an 'Unavailability reason'. It has fields for 'Name' (containing 'Sickness') and 'Description' (containing 'Sickness').

Name	Description
Name : * Sickness	Description : Sickness

Complete the required fields and click Save.

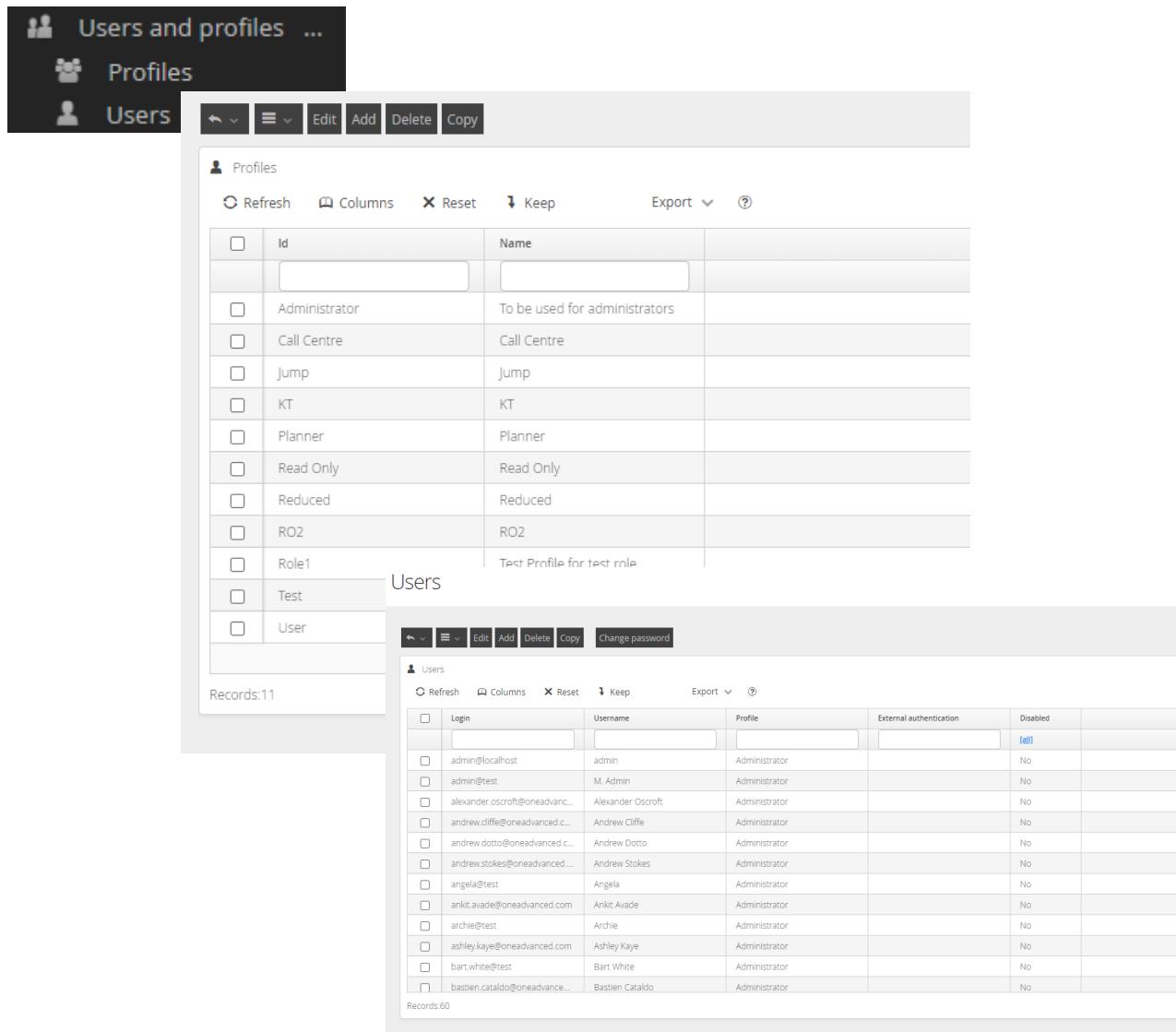
Delete

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

Users and Profiles

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

Page | 94



The screenshot shows the 'Users and profiles' interface with two main sections: 'Profiles' and 'Users'.

Profiles:

Id	Name
Administrator	To be used for administrators
Call Centre	Call Centre
Jump	Jump
KT	KT
Planner	Planner
Read Only	Read Only
Reduced	Reduced
RO2	RO2
Role1	Test Profile for test role
Test	
User	

Users:

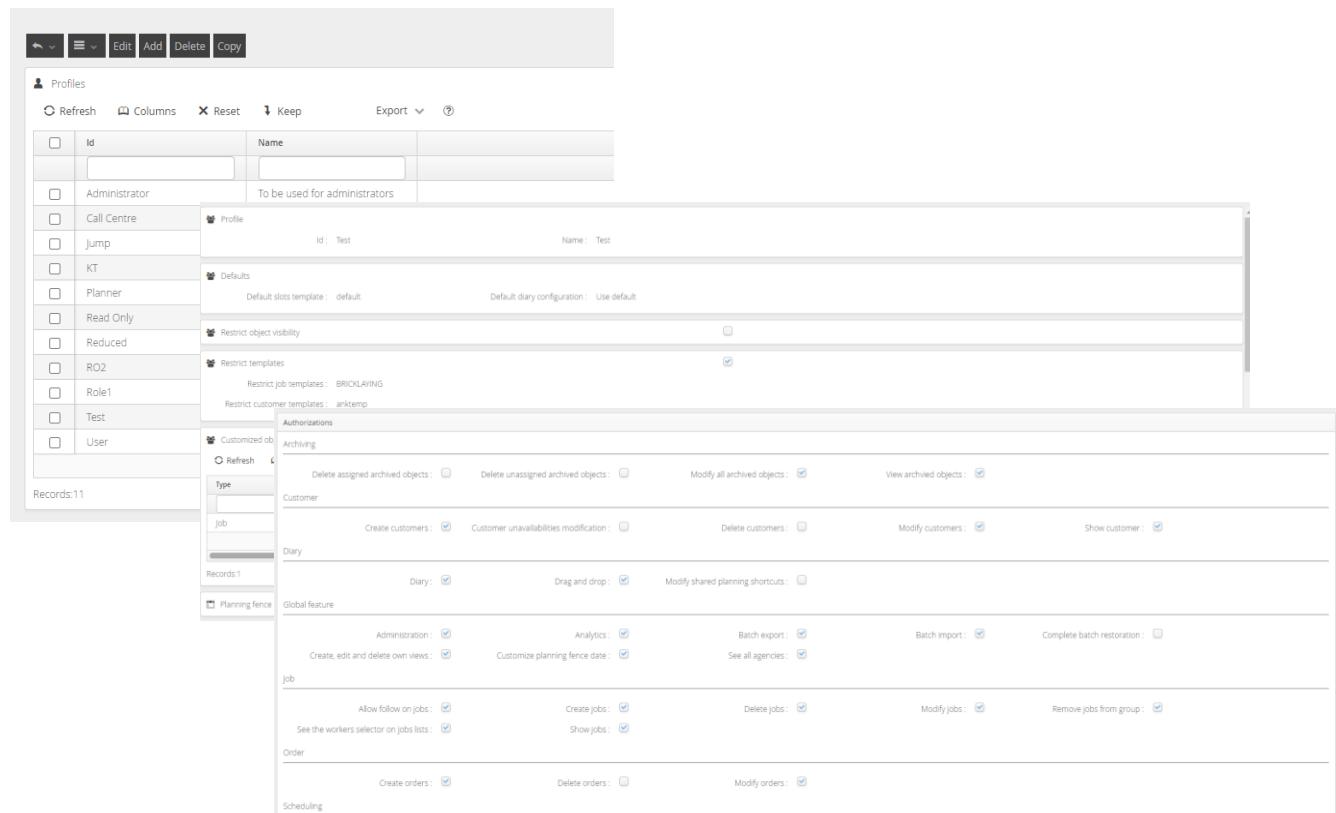
Login	Username	Profile	External authentication	Disabled
admin@localhost	admin	Administrator		(edit)
admin@test	M. Admin	Administrator		No
alexander.oscroft@oneadvanced...	Alexander Oscroft	Administrator		No
andrew.cliffe@oneadvanced.c...	Andrew Cliffe	Administrator		No
andrew.dotto@oneadvanced.c...	Andrew Dotto	Administrator		No
andrew.stokes@oneadvanced...	Andrew Stokes	Administrator		No
angela@test	Angela	Administrator		No
ankit.avade@oneadvanced.com	Ankit Avade	Administrator		No
archie@test	Archie	Administrator		No
ashley.kaye@oneadvanced.com	Ashley Kaye	Administrator		No
bart.white@test	Bart White	Administrator		No
bastien.cataldo@oneadvanc...	Bastien Cataldo	Administrator		No

Profiles

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

Profiles

Page | 95



Add/Copy/Edit

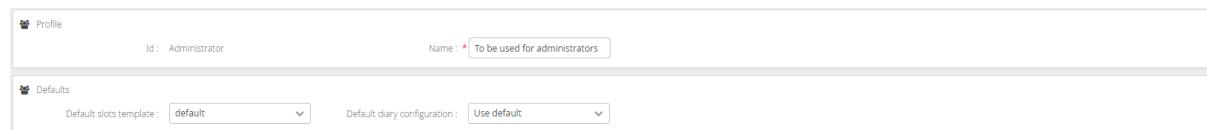
Add, Copy or Edit will allow you to Create or Modify a profile that has been configured. Modifying an existing profile will change the permissions set on this profile for all users assigned after the next login.

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.

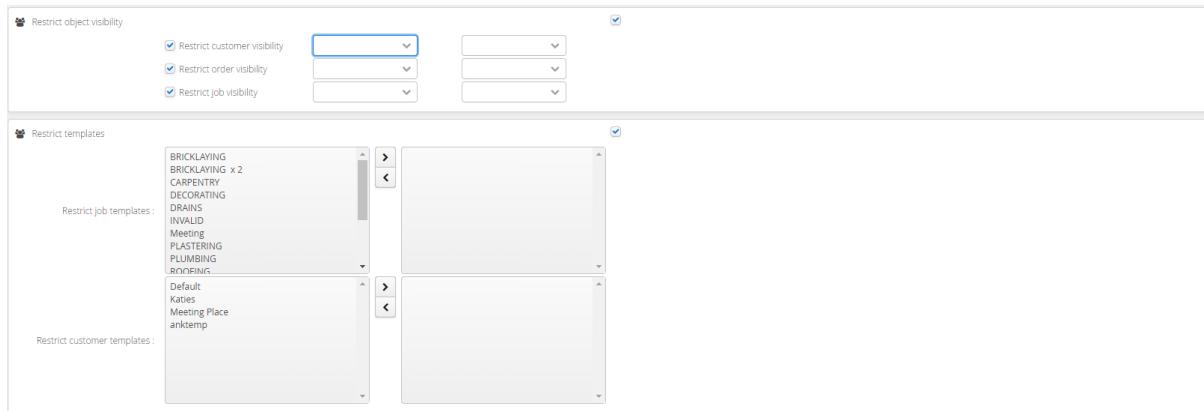


Object Restrictions and Visibility

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

Page | 96

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.

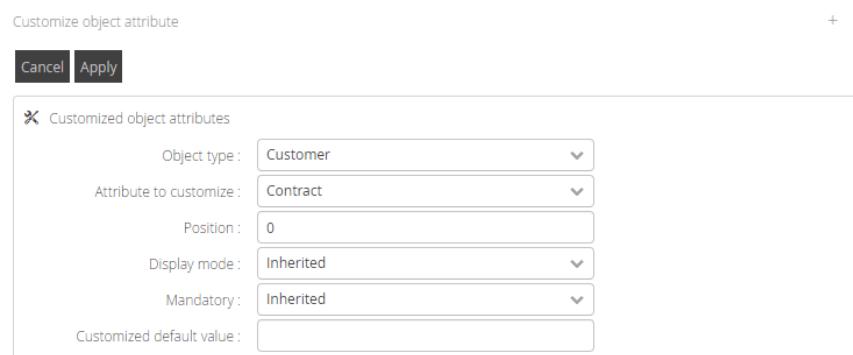
Customized Object Attributes

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



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.



From within this section, select your required Type, Object and preferred values. Once complete, click Apply.

Page | 97

Customized object attributes

Type	Name	Description	Position	Customized value	Display mode	Mandatory	Default value
Customer	CONTRACT	Contract	0	Inherited	Inherited		

Records:1

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.

Planning Fence Date

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

Planning fence date

To enable the function, first check the enable box.

Planning fence date

<input checked="" type="checkbox"/> Absolute	<input type="checkbox"/> Relative
Offset in hours:	
0	

Set your values as needed.

Authorizations

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

Enabling or Disabling any option within this section will Allow or Deny the function for all Users assigned to that profile. Any changes made to existing profiles will require the users to log out and back in for them to be applied.

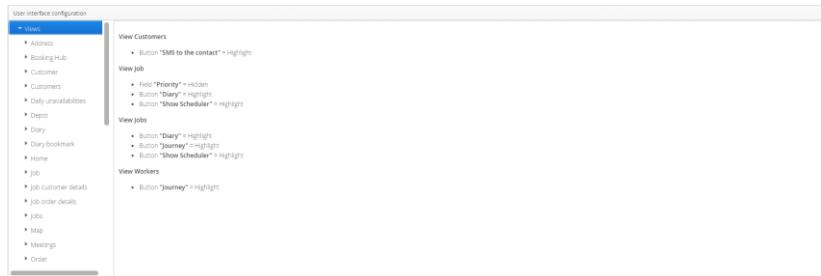
Authorizations

Archiving	<input checked="" type="checkbox"/> Delete assigned archived objects	<input checked="" type="checkbox"/> Delete unassigned archived objects	<input checked="" type="checkbox"/> Modify all archived objects	<input checked="" type="checkbox"/> View archived objects				
Customer	<input checked="" type="checkbox"/> Create customers	<input checked="" type="checkbox"/> Customer unavailability modification	<input checked="" type="checkbox"/> Delete customers	<input checked="" type="checkbox"/> Modify customers				
Diary	<input checked="" type="checkbox"/> Diary	<input checked="" type="checkbox"/> Drag and drop	<input checked="" type="checkbox"/> Mostly shared planning shorthands	<input checked="" type="checkbox"/> Show customer				
Global feature	<input checked="" type="checkbox"/> Administration	<input checked="" type="checkbox"/> Analytics	<input checked="" type="checkbox"/> Batch export	<input checked="" type="checkbox"/> Change job status to accepted	<input checked="" type="checkbox"/> Change job status to acknowledged	<input checked="" type="checkbox"/> Change job status to arrived	<input checked="" type="checkbox"/> Change job status to completed	<input checked="" type="checkbox"/> Change job status to departed
Job	<input checked="" type="checkbox"/> Create, edit and delete over views	<input checked="" type="checkbox"/> Customize planning fence date	<input checked="" type="checkbox"/> See all agencies	<input checked="" type="checkbox"/> Change job status to planned	<input checked="" type="checkbox"/> Change job status to started	<input checked="" type="checkbox"/> Change job status to in progress	<input checked="" type="checkbox"/> Force scheduling	<input checked="" type="checkbox"/> Immediately force when manual assignment
Order	<input checked="" type="checkbox"/> Allow follow on jobs	<input checked="" type="checkbox"/> Create jobs	<input checked="" type="checkbox"/> Delete jobs	<input checked="" type="checkbox"/> Modify time window end	<input checked="" type="checkbox"/> Modify time window start	<input checked="" type="checkbox"/> No planning preservation	<input checked="" type="checkbox"/> Planning preservation	<input checked="" type="checkbox"/> View status field in manual assignment screen
Scheduling	<input checked="" type="checkbox"/> Create orders	<input checked="" type="checkbox"/> Delete orders	<input checked="" type="checkbox"/> Modify orders	<input checked="" type="checkbox"/> Reschedule jobs already in progress	<input checked="" type="checkbox"/> Scheduling failure diagnostic	<input checked="" type="checkbox"/> Scheduling out of the time window	<input checked="" type="checkbox"/> Suspend job	
Worker	<input checked="" type="checkbox"/> Bodometers	<input checked="" type="checkbox"/> Can force phone number	<input checked="" type="checkbox"/> Complex view filter	<input checked="" type="checkbox"/> Delayed visualization of the job list on customer view	<input checked="" type="checkbox"/> Delayed visualization of the job list on order view	<input checked="" type="checkbox"/> Delayed visualization of the job list on worker view	<input checked="" type="checkbox"/> Delayed visualization of the worker list on customer view	<input checked="" type="checkbox"/> Delayed visualization of the worker list on order view
	<input checked="" type="checkbox"/> Import/export	<input checked="" type="checkbox"/> Map	<input checked="" type="checkbox"/> Meeting visible	<input checked="" type="checkbox"/> Navigation history	<input checked="" type="checkbox"/> Navigation history	<input checked="" type="checkbox"/> Navigation history	<input checked="" type="checkbox"/> Navigation history	<input checked="" type="checkbox"/> Navigation history
	<input checked="" type="checkbox"/> Services	<input checked="" type="checkbox"/> Text messaging						
	<input checked="" type="checkbox"/> Calendar and timetable management	<input checked="" type="checkbox"/> Delete workers	<input checked="" type="checkbox"/> Delete workers	<input checked="" type="checkbox"/> Manage panic mode	<input checked="" type="checkbox"/> Manage panic mode	<input checked="" type="checkbox"/> Manage panic mode	<input checked="" type="checkbox"/> Manage panic mode	<input checked="" type="checkbox"/> Manage panic mode
	<input checked="" type="checkbox"/> Show sectors on worker list	<input checked="" type="checkbox"/> Show worker						

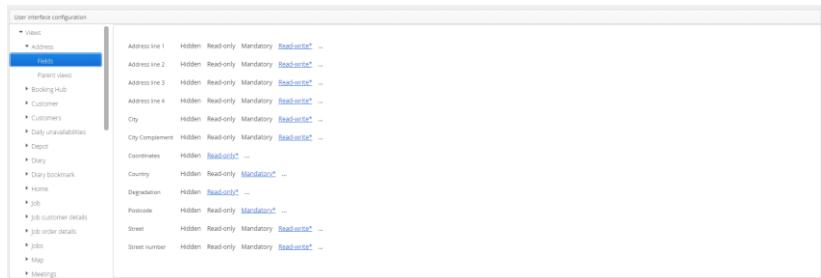
User Interface Configuration

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

Page | 98



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

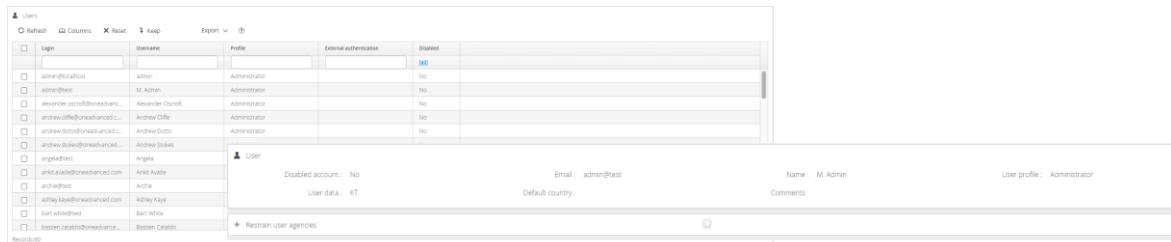
Delete will remove the selected Object. This action is not reversible.

USERS

Users in V6 function in the same way, but like many screens now appears using the new styling.

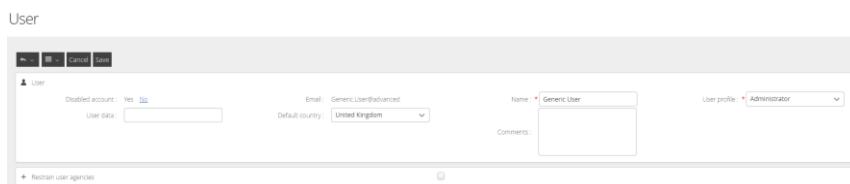
Clicking on any User will display the configured details.

Page | 99

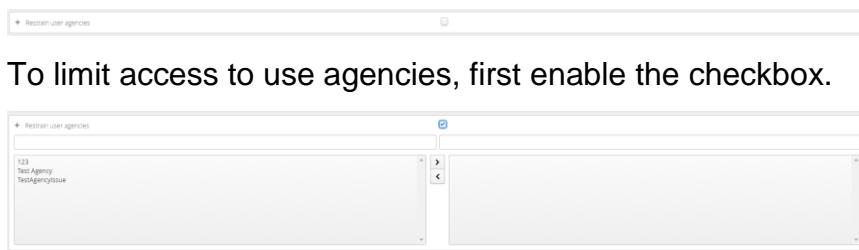


Add/Edit/Copy

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.



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 **Change password** button.



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

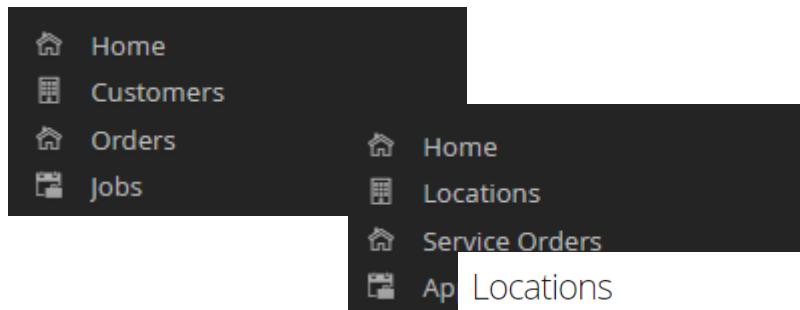
Page | 100

Vocabulary				
English				
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

Vocabulary				
English				
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	



Back	Save	Edit	Add	Delete	Copy	Map	SMS to the contact	Update comments
------	------	------	-----	--------	------	-----	--------------------	-----------------

Appendix 1

DRS 5.7 User Guide

Please see provided Document entitled

DRS 5.7 User Guide_v1.2.pdf

Page | 101

Appendix 2

Infosuite User Guide

Please see provided Document entitled

Infosuite UserGuide 2021.pdf