

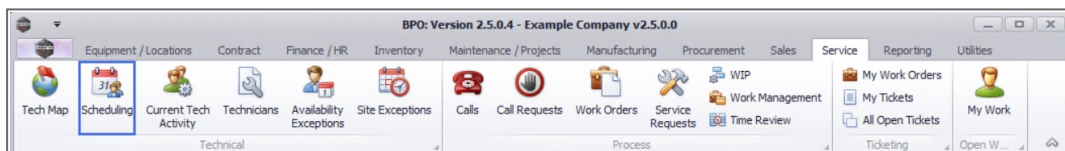
SERVICE

SCHEDULING

A Work Scheduling screen has been added within the **BPO_V2** application interface. It is designed for and can only be used by companies using **TechConnect** (the [Auto Accept Call Assignment](#) configuration flag must be set to 'No'), who needs to schedule Installations in advance.

 **Note** that this function should *not* be used for every day service calls.

Ribbon Access: *Service > Scheduling*

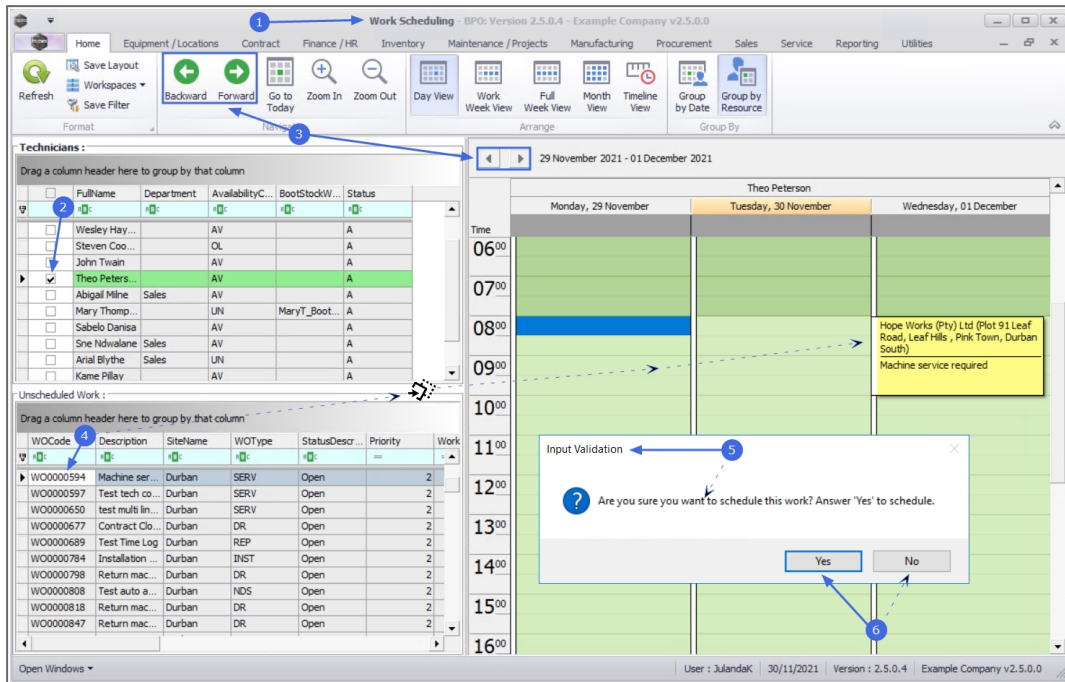


1. The **Work Scheduling** screen will be displayed.

SCHEDULE UNASSIGNED WORK ORDERS

2. Select the **Technician** you wish to assign a Work Order to from the **Technicians** grid.
3. On the **Calendar** grid, navigate to the **date and time** you wish to schedule the work for.
4. Select the work order code you wish to **assign** from the Unscheduled Work grid and **drag** and **drop** the work order to the Technicians calendar.
5. When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to schedule this work? Answer 'Yes' to schedule.**

6. Click on **Yes** to schedule the work, or
 - Click on **No**, to ignore the request.



ASSIGNMENT TIME

The duration of the assignment, when first placed on the calendar, will default to what is configured for the [Work Order Schedule > Required Craft Estimated Hours](#).

1. If no Estimated Hours have been configured on the work order, the **default** length will be set to a **2** hour block.

Adjust Assignment Time

2. To change the duration of the assignment, drag the assignment to fit the time required.
3. When you receive the **Input Validation** message to confirm
 - **Are you sure you want to change the end time of this work? Answer 'Yes' to change the scheduled time.**

4. Click on **Yes** to change the end time, or
 - Click on **No** to ignore the request and leave the end time at the original setting.



Note that an assignment cannot be changed if it has already been accepted by the Technician. The *white bar* on the left of the assignment will change to *red* when accepted.

The screenshot shows the 'Work Scheduling' application interface. On the left, there is a 'Technicians' list with columns for FullName, Department, Availability, BootStock, and Status. 'Theo Peters' is selected. Below this is an 'Unscheduled Work' list with columns for WOCCode, Description, SiteName, WOType, StatusDesc, Priority, and Work. The main area displays a calendar for 'Theo Peterson' from Monday, 29 November to Wednesday, 01 December. A yellow assignment is visible on Wednesday, 01 December, from 09:00 to 10:00. A blue callout box points to the white bar on the left of this assignment, stating: 'The white bar of the assignment will be red when accepted'. An 'Input Validation' dialog box is open, asking: 'Are you sure you want to change the end time of this work? Answer 'Yes' to change the scheduled time.' The dialog has 'Yes' and 'No' buttons. Numbered callouts (1-4) indicate the flow: 1 points to the assignment, 2 points to the dialog, 3 points to the question, and 4 points to the 'Yes' button.

RESCHEDULE ASSIGNMENT

1. To reschedule a work assignment, **drag and drop** the assignment to the required date and time slot on the technician's calendar.
2. When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to reschedule this work? Answer 'Yes' to reschedule.**
3. Click on **Yes**, if you are certain about your selection, or
 - Click on **No** to ignore the request and leave the work assignment as originally scheduled.

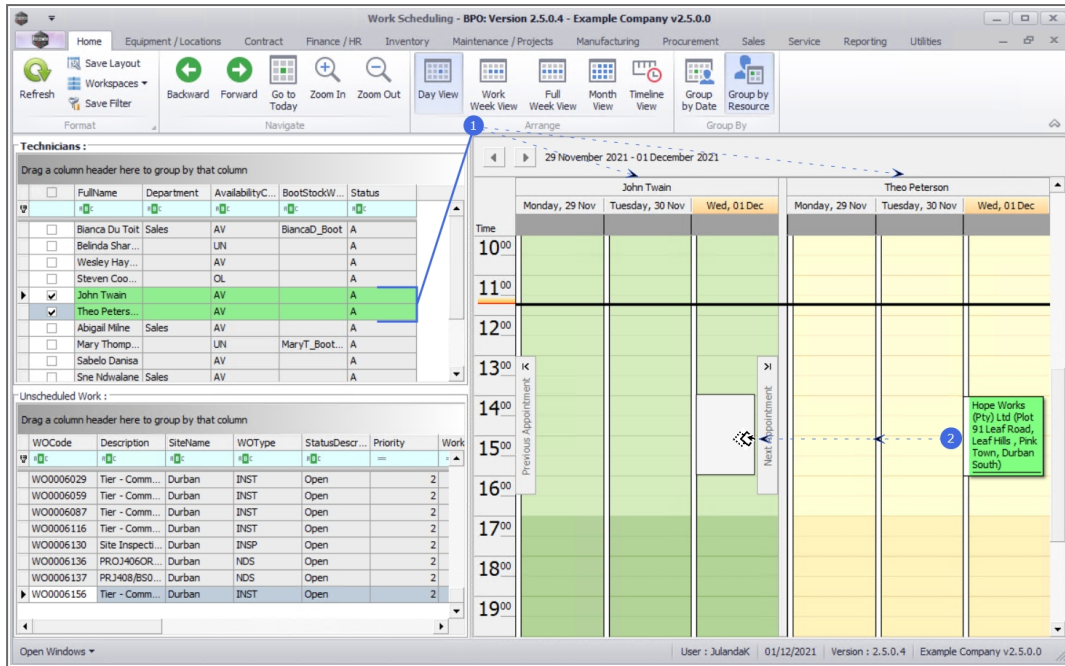


Note that an assignment cannot be changed if it has already been accepted by the Technician. The **white bar** on the left of the assignment will change to **red** when accepted.

The screenshot shows the 'Work Scheduling' application interface. On the left, there are two grids: 'Technicians' and 'Unscheduled Work'. The 'Technicians' grid lists various staff members with columns for Full Name, Department, Availability, and Status. The 'Unscheduled Work' grid lists work orders with columns for WCode, Description, Site Name, WOType, Status, and Priority. The main area is a calendar grid for 'Theo Peterson' from Monday, 29 November to Friday, 03 December. A yellow box on the calendar represents an assignment. A blue callout points to the white bar on the left of this assignment, stating: 'The white bar of the assignment will be red when accepted'. An 'Input Validation' dialog box is open, asking: 'Are you sure you want to reschedule this work? Answer 'Yes' to reschedule.' with 'Yes' and 'No' buttons. The dialog is numbered 2, and the 'Yes' button is numbered 3. A blue arrow labeled 1 points to the assignment bar.

ASSIGN TO ANOTHER TECHNICIAN

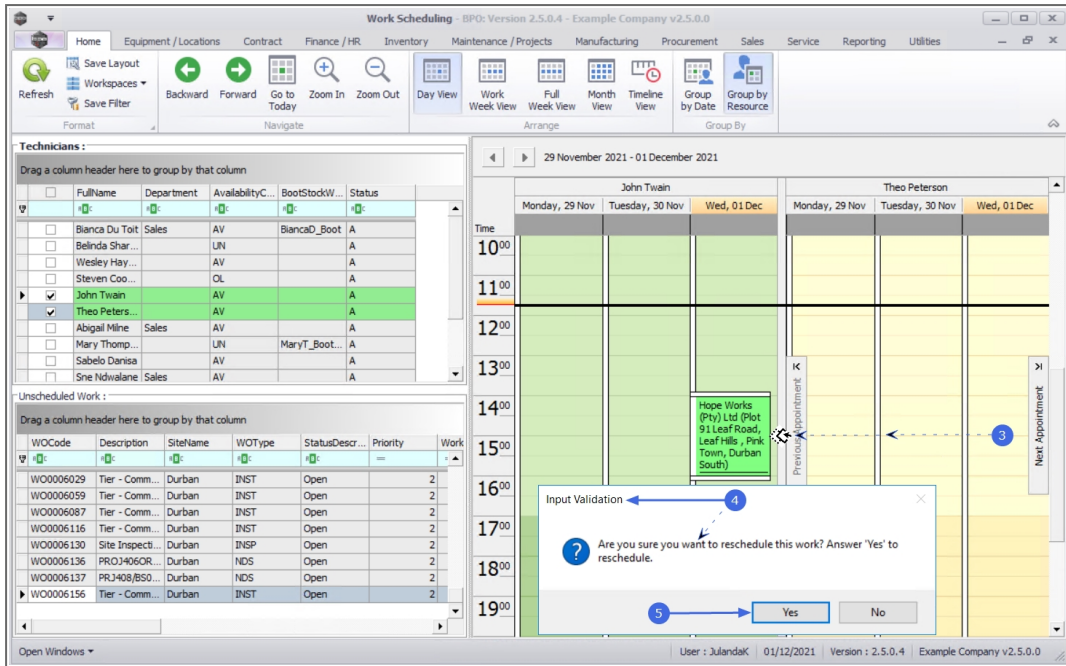
1. To move an assignment to a different Technician, ensure that both **Technicians** have been selected in the **Technician grid** to view both calendars.
2. **Drag and drop** the assignment to the required date and time slot for the alternative technician.



3. As you drop the assignment on the new slot,
4. you will receive the ***Input Validation*** message box to confirm;
 - ***Are you sure you want to reschedule this work? Answer 'Yes' to change the reschedule.***
5. Click on ***Yes***.

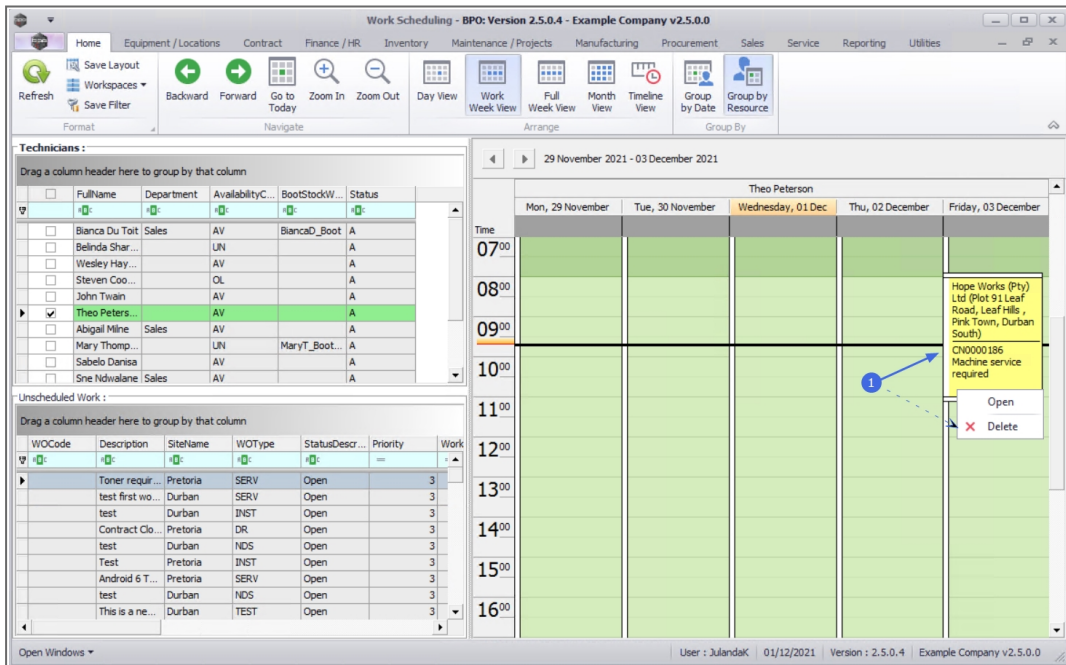


Note that an assignment cannot be changed if it has already been accepted by the Technician. The ***white bar*** on the left of the assignment will change to ***red*** when accepted.



REMOVE/DELETE AN ASSIGNMENT

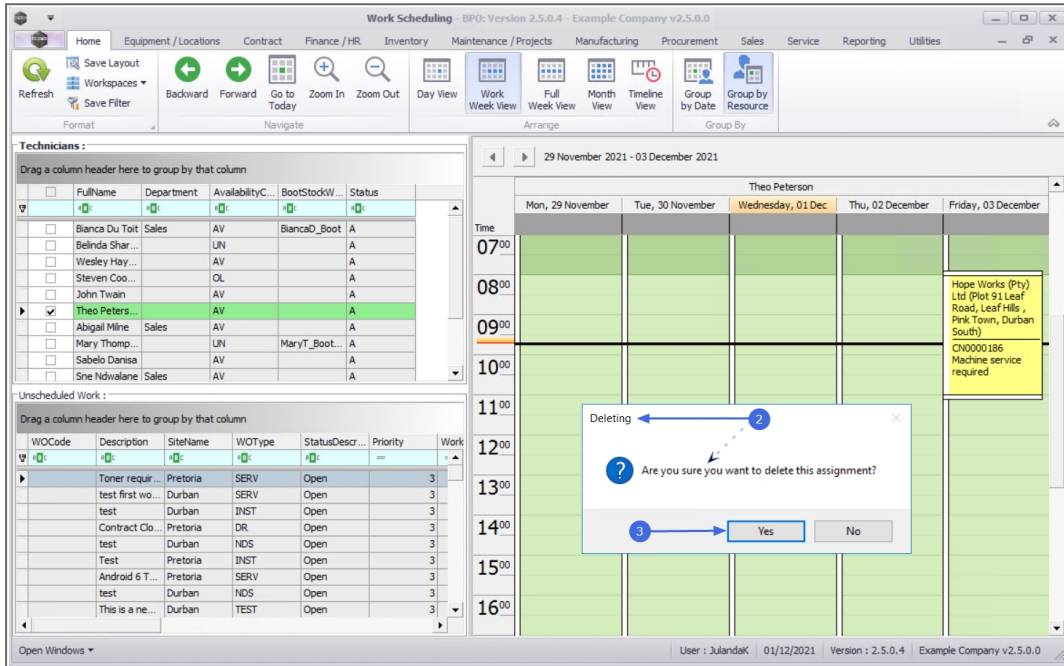
1. **Right click** on the assignment you wish to remove and then select **Delete**.



2. When you receive the **Deleting** message to confirm;
 - **Are you sure you want to delete this assignment?**
3. Click on **Yes** to remove the assignment.



Note that an assignment cannot be changed or deleted if it has already been accepted by the Technician. The **white bar** on the left of the assignment will change to **red** when accepted.



ACCEPT AN ASSIGNMENT

1. When the Technician **Accepts the call** or project on **TechConnect**, the **white line** on the **left** of the assignment with turn **red** to indicate that **no** changes can be made to the assignment.

The Technician will need to continue work on the call or project, until he has **End Work**

When work has been **completed** - the assignment will be **removed** from the Calendar.

If for some reason, the assignment was accepted, but the Technician is unable to do the work, then he should [Reject the Call from TechConnect](#). The assignment can then be assigned to another Technician.



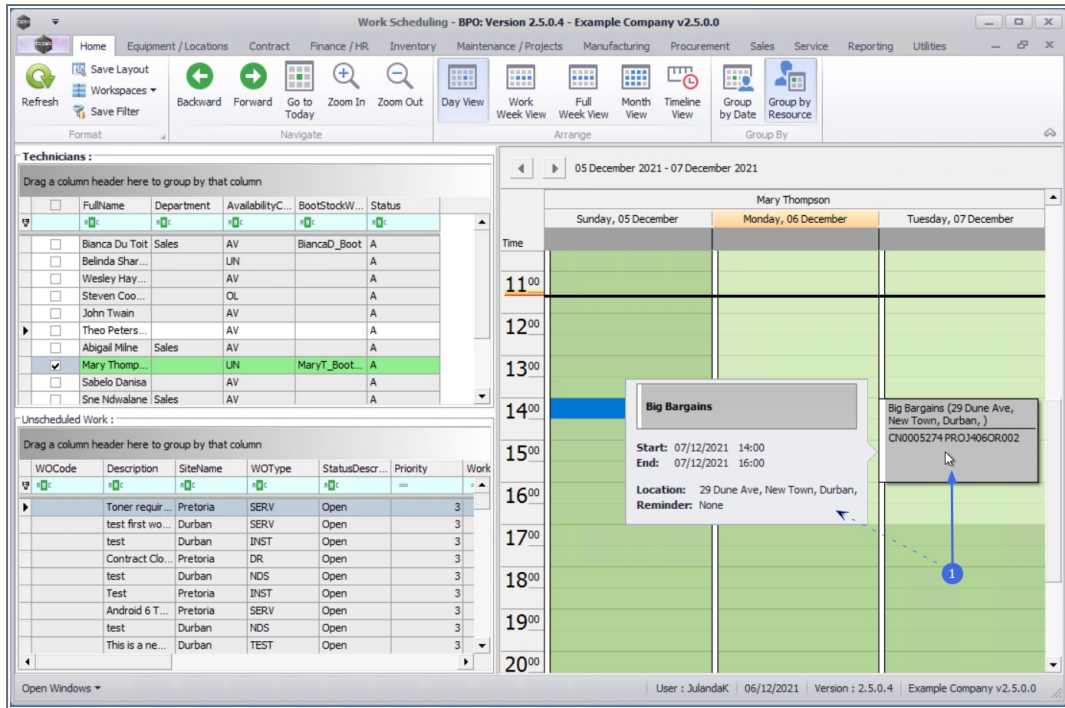
Note that if a Technician has already *Started Work* on *TechConnect*, then the call cannot be rejected. The Technician will need to *End Work* once done, or *End Work* as *Unresolved*.

The screenshot shows the 'Work Scheduling' interface for 'BPO: Version 2.5.0.4 - Example Company v2.5.0.0'. The main view is a Gantt chart for 'Theo Peterson' covering the period from Monday, 29 November 2021 to Friday, 03 December 2021. The time slots range from 07:00 to 16:00. A call assignment is visible on Friday, 03 December, from 08:00 to 09:00, with a call ID of 1. The call details are: 'Hope Works (Pty) Ltd (Plot 91 Leaf Road, Leaf Hills, Ink Town, Durban South)'. On the left, there are two tables: 'Technicians' and 'Unscheduled Work'. The 'Technicians' table lists various staff members, with 'Theo Peters...' selected. The 'Unscheduled Work' table lists various tasks with columns for WOCCode, Description, SiteName, WOType, StatusDescr..., Priority, and Work.

VIEW CALL ASSIGNMENT

From the Work Scheduling screen;

1. **Hover** the mouse over the scheduled assignment to view the **Start** and **End times**, the **Location** and any **Reminders** for the assignment, or



2. To **view** or **edit** the assignment, **double click** on the scheduled assignment.
3. " The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 3
4. When you are done working on the screen, click on **Save** to update the changes or
 - Click on **Back** to return to the Work Scheduling screen.

The screenshot displays the 'Work Scheduling' application interface. The main window is titled 'Work Scheduling - BPO: Version 2.5.0.4 - Example Company v2.5.0.0'. The interface includes a top navigation bar with various modules like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Refresh, Workspaces, Save Filter, Backward, Forward, Go to Today, Zoom In, Zoom Out, Day View, Work Week View, Full Week View, Month View, Timeline View, Group by Date, and Group by Resource.

The main content area is divided into several sections:

- Technicians:** A table listing technicians with columns for Full Name, Department, Availability, and BootSt. The table is currently empty.
- Unscheduled Work:** A table listing work orders with columns for WOCODE, Description, SiteName, and WOTYPE. The table contains several entries, including 'Toner requir...', 'test first wo...', 'test', 'Contract Clo...', 'test', 'test', 'Android 6 T...', 'test', and 'This is a ne...'. The 'test' entry with 'Durban' as the site name is highlighted.
- Call Assignment Window:** A pop-up window titled 'Call Assignment: Reference No. : CN0005274'. It shows the 'Assigned To' field set to 'Mary Thompson' and the 'Detail' field containing 'PROJ406OR002'. The 'Assignment Date' is '06/12/2021' and the 'Assigned By' is 'Julanda Kessler'. There is a 'Create new Work Order' checkbox and an 'Open Work Orders' section with a table listing work orders: WOCODE 'W00006136' and Description 'PROJ406OR002'.
- Calendar View:** A calendar view for 'Tuesday, 07 December' showing a grid of time slots. A call assignment is shown as a grey box on the calendar, labeled 'Big Bargains (29 Dune Ave, New Town, Durban,) CN0005274 PROJ406OR002'.

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