

# emergeit.jpg

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PDA v3 DESIGN DOCUMENT FOR: Strauss – Water UK

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# Aim

The purpose of this document is to define and describe the logic and work flow by which service calls will be maintained and dealt with on the PDA devices, as well as describing the available functionality on the PDA devices. The intention is to make sure that serial numbers will be catered for and also that Priority’s warehouse stock management will use the serial numbers so that the stock quantities and serial numbers quantities match in the warehouse.

# Service calls form(Priority)

## Serial numbers for service call

Every service call, based on its type, can have one or more serial numbers. The serial number can be defined on the top level of the service call form, or on the parts sub level form against each unit.

Development:

A new sub level form will be added to the service calls form. The form’s title will be ‘Serial numbers for call’. This form will hold all the serial numbers related to the call, whether they are from the top level of the service call, or from the parts sub form. The form will be a read only form. The data in this form will be used by the PDA application to find the service call which is related to the scanned serial number.

## Resolution code

Development:

A new flag will be added to the resolution codes table and form. The flag’s title will be ‘Inactive’.

The choose list of this field will display only values which are not flagged as inactive. The PDA application will work in a similar way - only values which are not flagged as inactive, will be displayed by the PDA application. The values will be sorted in an alphabetical order.

## Malfunction code

Development:

A new flag will be added to the malfunction codes table and form. The flag’s title will be ‘Inactive’.

The choose list of this field will display only values which are not flagged as inactive. The PDA application will work in a similar way - only values which are not flagged as inactive, will be displayed by the PDA application. The values will be sorted in an alphabetical order

## Phone call time stamp

The engineers are required to call the customer about an hour before they reach the site. A time stamp will be loaded into priority against the first call the engineer is making against the call.

Development:

A new field will be added to the service calls form. The field will be CHAR 20. The field title will be call time.

# PDA application

## Serial number form

Development:

A new form will be created in order to cater for the serial number and its location. The form will have two fields:

1. Serial number(CHAR 20) –this field can be populated by scanning the serial number’s barcode, or by inputting it manually.
2. Location(CHAR 20) – This field will be populated manually and will hold the location of the unit.

The form will have two buttons: Submit, in order to submit the information entered, and cancel, which will ignore the data on the form and come back to the service calls main menu form. The form will be mandatory to fill.

When the engineer presses the all menu option, he would not be able to report the call as completed unless data has been filled in in all forms. If all forms had been completed, the menu will show the close and completed options.

## Main menu form

The application’s main menu form hold general data of the service call. The information displayed is the call number, customer name, post code and type of service call. Some enhancments will be added to this form. The enhancments are detailsd below:

1. The order of the columns on this form will be Post code, customer name, call type, part family, status.
2. The form will be sorted by the start time of the call(first priority sort), and then by post code(second priority sort). The start time column will not be displayed but will affect the sort order (SERVCALLS.PTIME).
3. The part family column will be 3 characters long. The column will display the family code only if all serialized parts on the call have the same part family. Otherwise, this column will be blank.
4. Abilty to sort by the post code column will be added.
5. Ability to sort by status will be added.
6. When right clicking(stylus hold on screen) a call, the incomplete option will not be enabled unless resolution + malfunction codes have been populated.
7. A scan of a serial number while on this form will trigger a search through all service calls which type is not install. Onc ea service call that has the same serial number was found, it will be opened automatically. If a call wasn’t found, a message will pop up saying: ‘No call could be found for this serial number’.
8. Touching a specific call record on this form will open up the call(left click functinality), without the need to hold the stylus and then choose ‘Open’ from the dropo dowm menu.
9. By pressing and holding the stylus over a service call a menu will open up. The menu options will be: Complete, En-Route, On-Site, Incomplete.
10. The hardware buttons on the right hand side of the device will enable scrolling of the form up and down. The main center button(used as a mouse), will have the select functionality.

## Address form

1. The address lines will be ordered in the following order: Address line 1, address line 2, address line 3, city, county, post code.
2. The field phone number will enable dialing the number by pressing the call button on the PDA.
3. The first call made against the call will record a time stamp of the call and this will be loaded onto the service calls form into the call time field.

## Parts Form

1. A menu option will be added when right clicking the form(press + hold). The menu option name will be ‘Remove Unit’. This option will be used when the engineer decides to remove an existing unit.
2. By selecting the remove unit option, the serial form will fire up and prompt a scan of the serial number of the unit. The location field will not be mandatory to fill.
3. Once the engineer has submitted the serial number scan, the part number + serial number related to this scan will be loaded into the service calls-parts sub form, with a quantity of -1. Please note : In order for this mechanism to work, it was agreed by Strauss Water that the serial numbers are unique and that two different part numbers will not have the same serial number.

# Issue of units from the service calls form

## Issue by dispatch to the customer’s site

This type of issue will be done by specifying the unit’s part number and serial number on the service call form with a quantity of 1. The unit will not be available on the PDA parts form in this scenario.

## Issue by transfering the unit to the technician’s van

This type of issue will be done by specifying the unit’s part number and serial number on the service call form with a quantity of 1. The to warehouse and bin columns will need to be specified with the technician’s warehouse so that the unit will be available on the PDA parts form. In this scenario, the engineer will be able to issue the unit when installed, and this will result in an additional line on the service calls – parts sub form with a quantity of 1.

# Analysis approval

The following is to certify that both sides agree to the work flows and scope of customization described in that document:

Signatures:

Approved by (Client)

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_

Approved by (eMerge)

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_