Appendix 6

Field Nation Directions

Created By: Service Delivery Department

Date Prepared: 3/9/22

Reviewers/Editors: Director of Service Delivery, Service Delivery Managers, Service Delivery Supervisors, TPC Leads

Change History Table

Date Of Change	Name of Editor	Summary of Change
4/19/22	TN	Updated images and confirmed process notes correct
4/21/22	TN	Added page numbers, minor edits

1. **Field Nation Login Info**
   - ✓ Website: https://app.fieldnation.com/login
   - ✓ User Name: Email
   - ✓ Password: ChangeMe123

2. **About Field Nation**

   Field Nation ("FN") is a 3rd party vendor used for dispatching for our Service Delivery and Technical Support teams for a variety of work including, but not limited to Site Surveys, Installations, Trouble Tickets, Cable Work and Support Dispatches. FN is used both locally within San Diego and across the U.S.

3. **Three Roles (Permissions in FN)**
   a. Dispatcher – TPCs, Support (Tier 2 and 3)
   b. Manager – Service Delivery Supervisors, Support Manager
   c. Admin – Procurement Lead, SD Manager, Director of SD

4. **Best Practices**
   a. Submit Field Nation Work Order three or more days prior to dispatch date
   b. Review work order to ensure all information is updated correctly
   c. Communication/messaging is all done through the Field Nation Work Order. All photos provided by tech must be added through the work order.
   d. Complete Tech Review (on OTRS ticket) within 24 hours of completion of work order – we get rated on how long it takes us to pay and close out the work order.

5. **Flightboard/Create New Work Order**
   a. Select the + Sign on Top Left and Navigate to Work Order
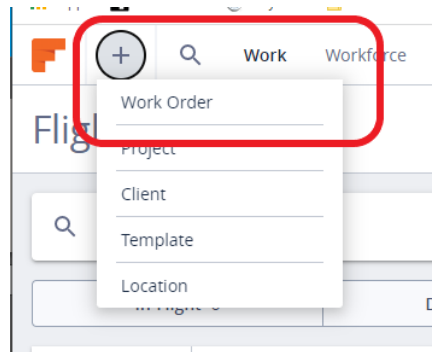
   b. New Work Order will display
   i. **Template –** Select your name and type of dispatch from list
   ii. **Work Order Title –** will populate from Template created –- update Start Time in Title
   1. Best Practice- Type of Work | Est Time | Firm Start Time

2

iii. Team – confirm this reflects your name – will populate from Template selected

iv. All other items you can leave as defaulted and unchecked

Overview

Template – *Optional*

Andrew - Install (Data & Voice)

Work Order Title

Installation for VOIP/Circuit Install | Est. Time on Site: 2 HR | Firm Time Start @ XX Time

A simple, str

Client – *Optional*

No clients

Project – *Optional*

No projects

Team – *Optional*

Service Delivery - Andrew

Work order options

☐ Disable export button

☐ Disable counter offers

☐ Require GPS during check in and check out

c. Work Categories –

    i. Type of Work – populate from template – edit as needed

    ii. Service Types – populate from template – edit as needed

    iii. Site Device – skip

Work Categories

Type of Work

Telecom / VOIP

Service types ⓘ

× Installation

Service types change depending on type of work selected

Site Device ⓪

Search or browse for device – *Optional*

Select...

Enter keywords such as device type, serial number or model

d. Work Order Qualifications – optional section to select licenses, certifications, insurance, necessary equipment, and COVID Vaccination Proof.

3

Work Order Qualifications

Work Order qualifications can include items like licenses, certifications, insurance, and necessary equipment. If any qualifications are mi:
confirm assignment.

	Qualification type		Certifications
⊖	Certifications ▲		Select...
	Certifications		
	Licenses		
	Equipment		
	Insurance		
	COVID-19 Vaccination Proof		

+ Add

Location

e. **Location –**
   i. Enter Display Name = NextLevel/Client Name
   ii. Add Address Information- Country, Address 1, City, State, Zip

Location

⦿ Specify exact address ◯ Use saved location ◯ Remote (no address)

Display name
NextLevel/Client Name
The display name will be shared with the assigned provider.

Location type
Commercial

Country
United States of America ▼

Address Line 1
12345 Street Name

Address Line 2

City
City

State
Select ... ▼

Zip Code
12345

☐ Save this location for future use

f. **Schedule –**
   i. Three options to select from:

   Schedule

   Schedule
   Arrive at a specific date and time ▲

   Arrive at a specific date and time
   Complete work between specific hours
   Complete work anytime over a date range
   Eastern

   ii. If you opt for Specific Date and Time, you have an option to select Hard Start date to ensure the techs understand the start time expectation.

iii.   Enter Date and Time. Time zone will default based on the address.

    g. Contacts – This should reflect your name based off template selected

    h. Service Description

      i.   This section highlights the expectations, tasks, and scope of work. This is defaulted from the template but does require some updates to customize for each order. The information in this section is public when the work order is assigned and what the techs will review when selecting/bidding on work orders.

      ii.   Proof of Insurance – need to confirm with the tech if they are covered by Field Nation Insurance or carry their own insurance. If they carry their own insurance, a copy of their COI needs to be attached to the work order.

      iii. **Service Description** – update this section to reflect what they are installing, time on site and type of experience needed to complete the work.

Service Description:

- Seeking a technician with experience in VOIP and circuit installations.
- Technician is required to install:
  - *TYPE and Quantity of Phones (i.e. 10-Polycom VVX410)*
  - *List Network Equipment (i.e. 2901 router and 3750 switch)*
- Provider should expect to be onsite for approximately TWO hours.
- Check-in and check-out with your Dispatcher/Technical Project Coordinator (TPC).

v. **Tools**- update as needed for work order

Tools Required:

- Laptop capable of 1G speeds
- Standard Telecom Tool Kit Including:
  - Screwdrivers, drill, etc.

vi. **The remainder of the items is default information that needs to remain in the work order. You can update On-Site Tasks and On-Site Deliverables as needed.**

vii. **Confidential Information – you can specific details that only the assigned provider will see.**

Note

If publishing to the marketplace, the description will be public. Make sure sensitive information is marked as confidential or in the Confidential Information section.

Confidential Information

B *I* U ≣ ☰

viii. **Tasks are preloaded based on template selected. You may add/modify/delete as needed for specific jobs.**

Tasks

+ Add Task

Prep

| ↕ **Upload file** of Please upload a copy of your insurance to the work order | 🗑 ⌄ |

| ↕ **Set start time** | ⌄ |

On Site

| ↕ **Check in** | ⌄ |

| ↕ **Call** 858-769-1829 regarding check in. | 🗑 ⌄ |

| ↕ **Upload/take photo** of Please take a picture of the Modem/Router serial number and mac address (If applicable) | 🗑 ⌄ |

| ↕ **Upload/take photo** of of installation area before you start working | 🗑 ⌄ |

| ↕ **Perform SOW under direction of the TPC** | 🗑 ⌄ |

ix. Custom Field – Add Homir Order Name

Custom Fields

Buyer Custom Fields

General

Homir Order Name

Enter required value for the field Homir Order Name

x. Pay Section - Skip – DO NOT ENTER ANY INFO

xi. Save As Draft

xii. Optional – Upload NLI survey template

xiii. Create OTRS Ticket for Field Nation ticket

6. Work Order Published and Assigned

a. Procurement will assign/route work order

b. A calendar invite is set up on Dispatch calendar upon tech being assigned

c. Once a tech is assigned:

    i. Call tech to review the work order

        1. Does the tech have the required insurance?

        2. Does the tech have the skill/aptitude to complete the work?

        3. Does the tech have the tools to complete the work?

        4. Does the tech understand expectation of professional and communication while onsite?

5. Confirm date and time of appointment, and expectation of the tech to call upon arrival
6. (Optional) Confirm pickup of equipment and address prior to proceeding to the site

7. Onsite Work Performed
   a. Record techs arrival time
   b. Provide guidance to the tech via phone as needed
   c. Review pictures and/or survey doc with the tech to ensure work is complete and you have a thorough understanding of the site and/or work completed
   d. Release tech and record departure time

8. Work Order Completion
   a. Download all photos and necessary information from the Field Nation ticket and save in client folder
   b. Complete Tech Review (on OTRS ticket) within 24 hours of completion of work order – we get rated on how long it takes us to pay and close out the work order.

REMINDER:
Upon completion, please add note to the ticket rating the tech

- On Time
- Prepared
- Have requested tools/laptop, etc to complete the project
- How many hours on site
- Did you approve any additional expenses/purchases? (i.e. patch cable or parking)
- Would you use this tech again
- Do you want the tech added to your talent pool
- Special Notes