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Dispatch Console QRG

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Titanium

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## DISPATCH CONSOLE INTRODUCTION

- Requires Adobe Shockwave player plug-in in the browser
- Key purposes of the Dispatch Console:
  - Assign and/or schedule incoming work orders to the most suitable service teams or technicians
  - React to real-time activity on the field to reassign or adjust schedules
- Only Work Orders can be dispatched using this tool
- The Dispatch Console Supports two types of configurability:
  - User interface settings driven by user's preferences
  - Functionality settings set by ServiceMax administrator
- Suitable for dispatchers covering certain territories or service teams
- Service Team leaders can also use the tool to know the current work load of technicians, (re)assign and (re)schedule work orders
- Technicians can view and rearrange their assignments and schedules
- An automated dispatch process (*Immediate* Dispatch method) can be a pre-cursor to reaching the work order to a Dispatch Console user
- Dispatch console provides an added level of flexibility by using MTTS rules to determine the service duration for new events. If the work order does not have an MTTS, org-wide default is considered



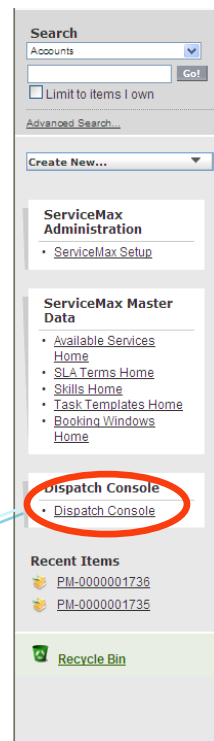
## ACCESSING THE DISPATCH CONSOLE

There are two ways to access/launch the Dispatch Console:



Click on the Schedule button from within an existing Work Order

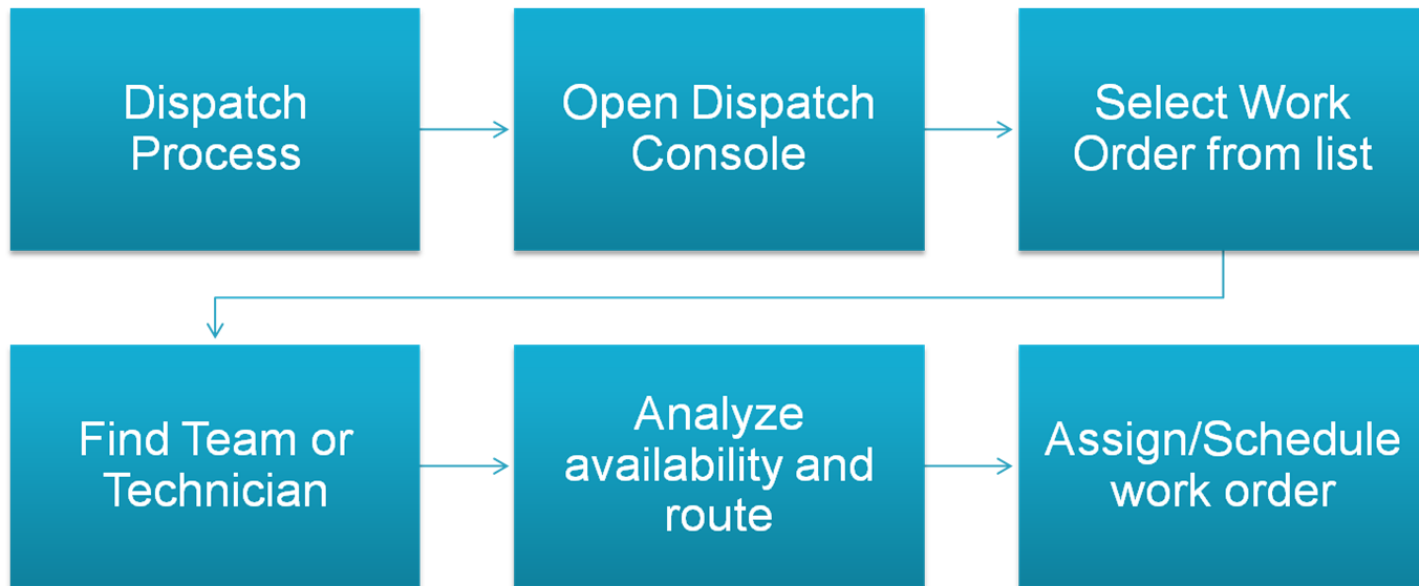
Click on the Dispatch Console Link from the Home Page





## DISPATCH WORK FLOW

This is the proposed work flow for using the dispatch console.





## DISPATCH CONSOLE OVERVIEW

The screenshot displays the ServiceMax Dispatch Console interface. The top navigation bar includes links for **Launch Help**, **Save Settings**, **Configure Search**, and **Reset Settings**. The main content area is divided into two primary sections: **Work Orders** and **Technicians**.

**Work Orders Section:** This section features a table with columns for **Work Order Number**, **Age Bucket**, **Contact**, **Closed By**, **Component**, and **Country**. The table lists three work orders, all with an age bucket of "More Than 30 days" and contact "Andy Young". A blue arrow labeled **Floating Panel** points to the top of this section. A large blue double-headed arrow labeled **Work Order List** spans the width of the table.

**Technicians Section:** This section includes a **Service Team View** on the left, a **Calendar** in the center, and a **Map** on the right. The **Service Team View** is a **Tree View** showing a hierarchy of technicians, including **Team Tech**, **Equipment**, **Fuel Injection**, **John**, **Bruce**, **SFDC Team**, **Jack**, and **Allen**. A blue arrow labeled **Tree View** points to this list. The **Calendar** displays a weekly view from **Tue Jan 26, 10** to **Sun Jan 31, 10**. A blue arrow labeled **Calendar** points to the calendar grid. The **Map** shows a world map with a focus on North America. A blue arrow labeled **Map** points to the map area.

A blue arrow labeled **Status Bar** points to the bottom of the interface, which displays the status **System Initialized**.





## THE WORK ORDER LIST

Keywords get filled automatically when a work order is selected from the list. User can also type keywords

Inline filter works on the displayed list of work orders only – does not reach the server to fetch matching records

Inline filter can be applied only on displayed fields

Work Order: SVO-000341

SVO-000341 Status 500A0000001pzMolAI, Santa Clara, UL12345678, Open, CA, 95124

Filter By

Work Order Number	Account	Contact	Case	Priority	Order Status	Order Type	Dispatch Status	City	State	Component	Customer Down Status
SVO-000341	Atlantic Healthcare System	Laura Johnson	500A0000001pzM		Open		Assigned	Santa Clara	CA	UL12345678	No

Note: Actions that can be performed from work order list:

- View Work Order record

Status filter is based on *Dispatch Status* field:

*Assigned* for work orders that have a Technician

*Queued* for work orders that have a Team

Note: Actions that can be performed from work order list:

- View Work Order record
- Assign work order to multiple technicians
- Remove all assignments of a work order

Status filter is based on *Dispatch Status* field:

*Assigned* for work orders that have a Technician

*Queued* for work orders that have a Team but Technician is blank

New for work orders where Team and Technician are blank



## CONFIGURE WORK ORDER VIEW

**Configure Work Order View**

Choose Work Order fields to display

Available fields	Selected fields
Actual Initial Response	Work Order Number
Actual Onsite Response	Account
Actual Resolution	Contact
Actual Restoration	Case
Age	Priority
Age Bucket	Order Status
Case Number	Order Type

☒ Automatically refresh list every  Minutes

Note: Settings are saved for the user and remembered across browsers and sessions

Use these arrows to move fields between available and selected

Use these arrows to change the order of selected fields in the list



## WORK ORDER ACTIONS

Work Order: SVO-000341

SVO-000341 Status 500A00000001

Work Order Number	Account
SVO-000341	Atlantic H

Click on the expand arrow to see the Work Order Action Options

Assign to Multiple  
Show Record  
Unassign this Work Order

*Assign to Multiple* launches Multiassign screen

*Record View* launches Salesforce record in view mode

*Unassign* prompts user for confirmation before removing all assignments of current work order



## ASSIGN TO MULTIPLE ACTION

Launch the Multiple Assignment window by clicking the expand arrow next to a work order on the work order list.

### Purpose:

To assign a work order to more than one technician

To schedule the work order on the calendar of multiple technicians

To mark one of the technicians as the primary technician (owner) of the work order

Multiple Assignment for Work Order: SVO-000341

Click on Technician(s) to add to the assignment list

Owner

☐ Stacey Of... Start time 05/14/2010 01:00 PM Duration 01:00

☐ Scott Tec... Start time 05/14/2010 01:00 PM Duration 01:00

☒ Michael B... Start time 05/14/2010 01:00 PM Duration 01:00

Assign

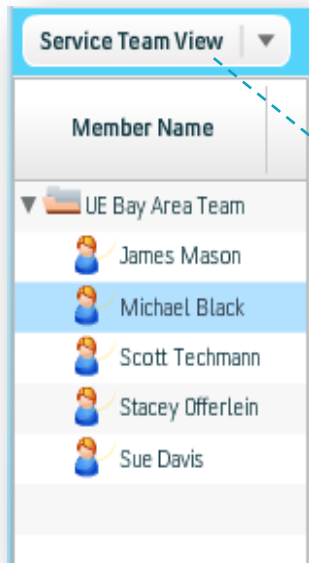
Clicking on a technician from the tree adds the technician to the assignment list

User must choose dates and times manually

Any existing assignments are removed



## TEAM AND TECH TREE VIEW



Team members are displayed in alphabetical order.

Notes:

Two modes: Service Team or Territory

Default is Service Team view (configurable)

Data displayed if:

- User is added as a dispatcher to a team and/or territory
- OR if user is linked to an existing Technician record

Columns can be configured by user. Column settings are saved for the user across browsers and sessions

For technicians, additional actions are available to view Technician Record and to view Daily Route on the map



## CALENDAR VIEW

The screenshot displays the ServiceMax Calendar View interface. The top navigation bar includes several icons: a folder, a calendar, a plus sign with '15', a minus sign with '15', and a refresh icon. The date range is set from 05/14/2010 to 05/21/2010. A globe icon is used to select the time zone. The calendar grid shows days from Saturday, May 15, 10, to Thursday, May 20, 10, with AM and PM time slots. A callout menu for the first slot lists 'Collapse', 'Expand', 'Add', 'Delete', and 'Reset'. A red box highlights a yellow event block, with a callout stating: 'Driving time is displayed a line, Service time is displayed by a block'. A large yellow note box contains the following text:

**Notes:**

- Shows events for technicians (both Salesforce and non-Salesforce users)
- Allows rearranging of existing events on calendar
- Allows creation of new events (related to work order or otherwise)
- Allows editing or deletion of existing events

Other callouts include: 'Expand or Collapse Calendar Date Range' pointing to the date range selector, and 'Select Time Zone' pointing to the globe icon.



## NEW EVENT

The New Event window displays when a Work order is dropped to a technician, the New Event button is clicked, or an existing event is double-clicked.

**New Event**

Assigned to: Sample Technician

Subject: WO-0000007

Description:

Start Date: 10/08/2010 09:00 PM

End Date: 10/08/2010 11:00 PM

Location:

Duration (Minutes):

Drive time	Idle time	Service time
60	0	60

☐ Remove current assignment and reassign the work order

☐ Remember my preference

Save

Assigned To, Subject, Start and End date are mandatory

The total event time should be the sum of the Drive time, Idle time and Service time.

### Notes:

Using Subject Rules, the default subject for new work order events can be configured.

One or more fields from Work Order can be used as the event's subject. Since the rules are driven by flexible criteria, you can configure event subject to show appropriate information relevant to each event.

For example, field service events can use the customer name, street & city in the subject, installation work orders can have product name and so on



## CONFIGURE TECHNICIAN VIEW

Dispatch console provides a configurable setting to restrict new events to a technician's working hours only. If this option is enabled, the user will be allowed to save an event only if the event starts within the technician's working hours.

Any associated holidays for the technician are considered for this check as well

Use these arrows to move fields between available and selected

Use these arrows to move fields between available and selected



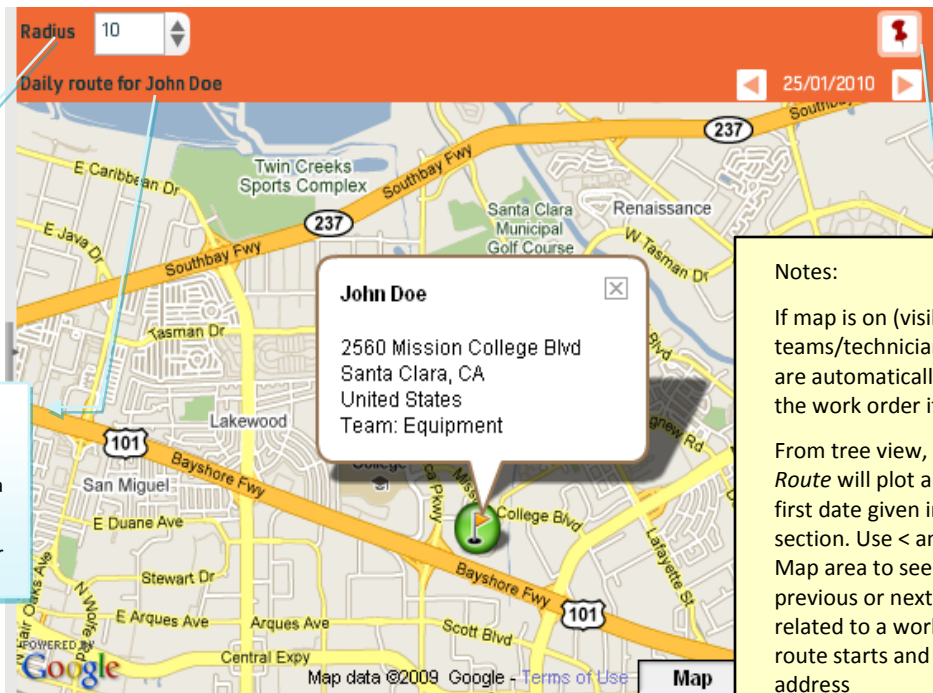


## MAP VIEW

Default radius is configurable and remembered across browsers and sessions

The Map View can be used either to find technicians or teams in a given radius of the selected work order or to find a technician's daily route

The Map can be panned out for use with multiple displays.



The floating panel can be pinned to remain stationary

### Notes:

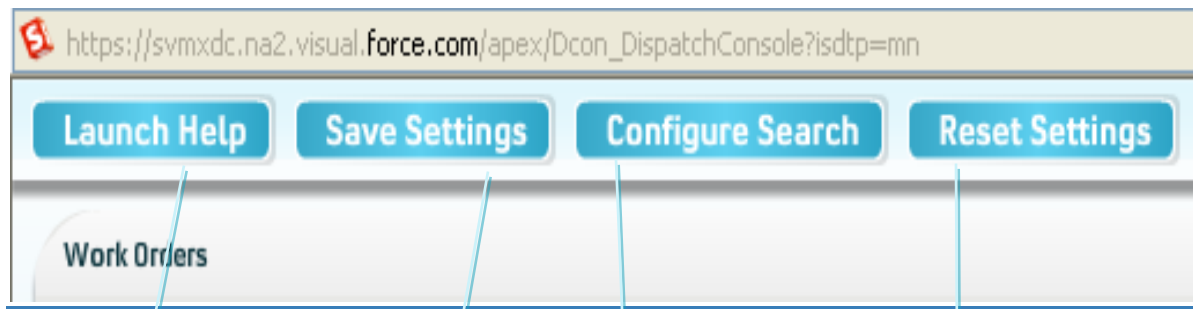
If map is on (visible), matching teams/technicians from search results are automatically plotted along with the work order if within the radius

From tree view, clicking on *Show Route* will plot all work orders for the first date given in the calendar section. Use < and > buttons in the Map area to see route for the previous or next days. Any event related to a work order is plotted. The route starts and ends at technician's address



## FLOATING PANEL VIEW

The Floating Panel appears on mouse-over at the top of the screen. It Collapses when mouse is moved away from the panel



*Launch Help*  
shows online  
user guide

*Save Settings*  
saves all user's  
changes  
permanently.  
The changes will  
be lost if this is  
not done

*Configure Search*  
opens popup  
window to  
configure  
keyword search

*Reset Settings*  
restores 'factory  
defaults' for  
dispatch console

