Field Service Management ES

Intuit Field Service Management ES

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Interacting with the Dispatcher

User Guide

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Before You Begin

This guide explains how communication between a dispatcher and field tech can work effectively using Field Service Management. The following assumptions apply to the use of this guide:

- You have a valid URL, user ID, and password for your Intuit Field Service Management product.
- Your computer has Internet access.
- You have a basic understanding of how to operate a supported version of Microsoft Windows, including how to use Internet Explorer as an Internet browser.
- You have acquired and configured mobile devices for your field techs, including GPS mapping (see Setting Up Mobile Devices for Field Service Management user guide for additional information).
- Your company's techs are set up to receive alerts (some sections may not apply if your company does not use alerts)

Using This Guide

Appearance: Since your company can customize Field Service Management software by changing the screen appearance, words, and phrases used in the application, some images used in this guide may not exactly match those that appear on your screens.

Path Reference: Path references will be used in this guide to direct you to the appropriate screen within your application. For example, to configure GPS settings from the web application, the path is Settings > Mobile Settings > Device Settings. This means that, within your web application, you select the Settings page, select the Mobile Settings tab on that page, then select the Device Settings option from the Mobile Settings menu.

Conventions: The Field Service Management product you use will often be referred to as the **web application,** or **application,** within this guide.

Mobile Device:	Within this guide, the term Mobile Device will refer to any BlackBerry or Windows Mobile device supported by Field Service Management, as well as any supported peripheral device that connects to a supported BlackBerry or Windows Mobile handset(see System Requirements in this section).
System Administrator:	This is the person at your company who manages your Field Service Management web application. The term System Administrator is used in this guide.
Dispatcher	Person who operates the Field Service Management Dispatch Board.
Tech/Field Tech	Person who uses Field Service Management on a mobile device and services customers in the field.

Service Management Onscreen Conventions

How Do I?	Integrated into Field Service Management is an on-demand help system that can guide you through configuration and application use. To access the help system, click the **How Do I?** link in the upper right corner of each Field Service Management screen.
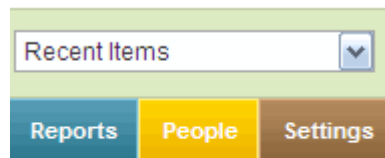
Activity Center:	The Field Service Management web application is divided into groups of user functions, called Activity Centers. For example, customer functions, such as adding or viewing a customer record, are found in the Customer Activity Center. To access an Activity Center, click the appropriate button on the Activity Center bar:

Figure 1: How Do I? link (top) and Activity Center button bar (bottom)

System Requirements

Supported Operating System:

Field Service Management can be used with the following Microsoft Windows operating system versions:

- Microsoft Windows XP, Vista and Windows 7 operating systems, using Internet Explorer version 6 or higher as your Internet browser.

BlackBerry primary hardware requirements:

Field Service Management Mobile Java Client for BlackBerry can be used with most modern BlackBerry handsets.

Windows Mobile primary hardware requirements:

Field Service Management Mobile Client for Windows Mobile is compatible with most Windows Mobile 5 and 6 devices that have a data connection. Both Windows Mobile 6 Professional and Standard as well as Windows Mobile 5 PocketPC and Smartphone are supported

Peripheral Hardware requirements:

Printing: In order to print jobs or invoices in the field, a Bluetooth mobile printer must be paired with the device. This is the supported printer Citizen CMP-10 BT

External GPS: To track field technicians and record locations of their actions on a device that does not have an internal GPS, a Bluetooth GPS receiver is required. Examples of GPS receivers include (but are not restricted to):

- Teletype SBT-1000
- GlobalSat BT-359
- Wintec WBT-2000

Overview

Field techs using Field Service Management can interact with their dispatcher by using a mobile device. By taking advantage of Field Service Management and mobile device features, the field techs and dispatcher can work together to:

- Respond quickly to emergency service requests
- React immediately to problems in the field
- Handle scheduling and routing efficiently

This guide will take you through a typical work order and demonstrate how the dispatcher and field tech interact through the mobile device. For detailed information on how to use a mobile device with Field Service Management, refer to the Mobile Client for BlackBerry (or Pocket PC) user guides.

Figure 2: Examples of mobile devices supported by Field Service Management: Pocket PC device (left), BlackBerry device (right)

Communicating through a Mobile Device

There are several key stages of the work order process in which a tech and dispatcher interact.

Note: Information synchronizes between the Field Service Management web application and a mobile device at regular time intervals. By default, updates occur every 5 minutes during the time a tech is logged in.

Dispatcher ◄-► Field Tech Communication in the Work Order Process

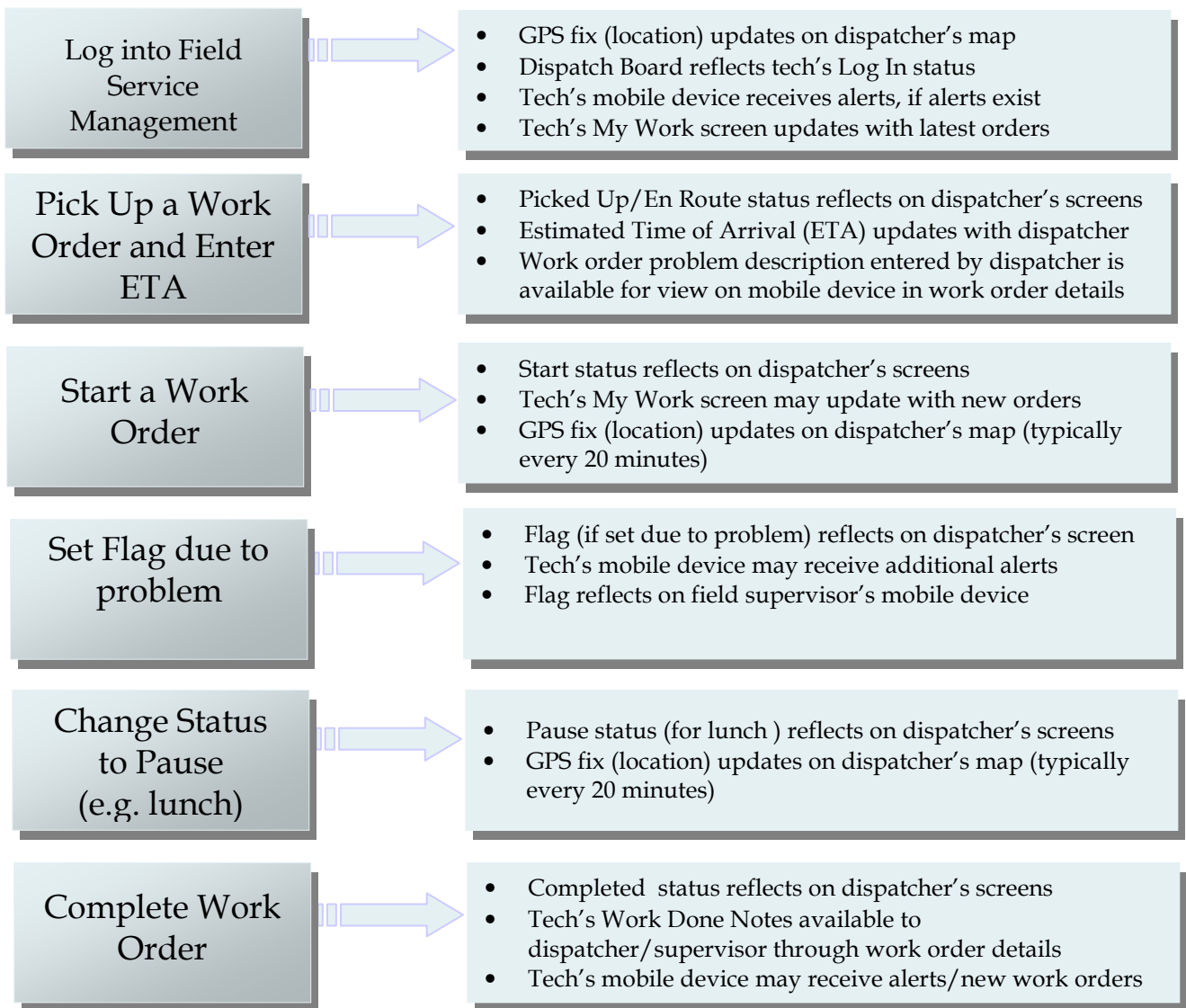A Field Tech typically does this…   This communication typically occurs…

A Field Tech typically does this…	This communication typically occurs…
Log into Field Service Management	• GPS fix (location) updates on dispatcher's map • Dispatch Board reflects tech's Log In status • Tech's mobile device receives alerts, if alerts exist • Tech's My Work screen updates with latest orders
Pick Up a Work Order and Enter ETA	• Picked Up/En Route status reflects on dispatcher's screens • Estimated Time of Arrival (ETA) updates with dispatcher • Work order problem description entered by dispatcher is available for view on mobile device in work order details
Start a Work Order	• Start status reflects on dispatcher's screens • Tech's My Work screen may update with new orders • GPS fix (location) updates on dispatcher's map (typically every 20 minutes)
Set Flag due to problem	• Flag (if set due to problem) reflects on dispatcher's screen • Tech's mobile device may receive additional alerts • Flag reflects on field supervisor's mobile device
Change Status to Pause (e.g. lunch)	• Pause status (for lunch) reflects on dispatcher's screens • GPS fix (location) updates on dispatcher's map (typically every 20 minutes)
Complete Work Order	• Completed status reflects on dispatcher's screens • Tech's Work Done Notes available to dispatcher/supervisor through work order details • Tech's mobile device may receive alerts/new work orders

Figure 3: Common points of mobile device interaction within the typical work order process

Starting Work

Overview

The first interaction between the field tech and the dispatcher occurs when the tech turns on a mobile device and logs into Field Service Management. Several events are triggered:

- The dispatcher receives a GPS fix on the tech (if the tech has a GPS enabled device and has a clear line of sight to the sky), which reflects on the dispatch board map
- The tech receives a list of work orders on the Field Service Management mobile client's My Work screen
- The tech may receive alerts concerning emergency work orders (or any other condition for which the tech is configured to receive alerts)

Logging In

When a tech logs into Field Service Management from a mobile device, the dispatcher sees the tech's status on the dispatch board (see Figure 4). The dispatcher also sees a GPS fix on the Dispatch Board map, reflecting the tech's location.

Figure 4:

The tech logs into Field Service Management from a mobile device (see Pocket PC example left).

Immediately in the office, the dispatcher sees that the tech logged in (see sample of Dispatch Board above).
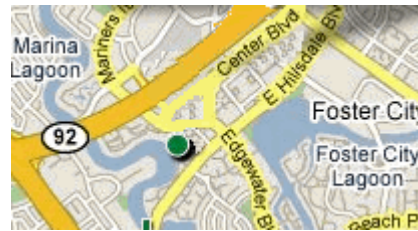
The dispatcher also sees the tech's location on the Dispatch Board map, represented by a colored marker (above).

Receiving Alerts

Alerts are sent to a mobile device if the tech is configured to receive alerts. Alerts can be sent at any time. A tech receives any active alerts when the tech turns on the mobile device and logs into Field Service Management.

Note: To configure a mobile user to receive alerts:

1. Click on the People tab. The first screen that appears will be the People List View.
2. Select **All Users** from the View menu to list all users currently added to the system. For large user databases, you may want to filter the list by Service Team or Dispatch Center.
3. Click on the name of the user you need to modify. The user's detail screen will appear.
4. Click **Edit** on the Alerts tab, then follow prompts to set up the user for alerts.

Global alert settings can be changed through **Settings>Work Orders>Alert Settings** in the web application. Global alert settings affect all mobile device users.
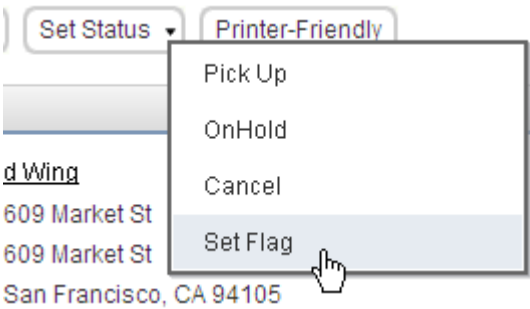
Figure 5:

Alerts can be sent for many reasons. For example, when a work order flag is set (above)...

the tech receives an alert on the mobile device (right) if the tech is configured to receive alerts for flagged work orders.
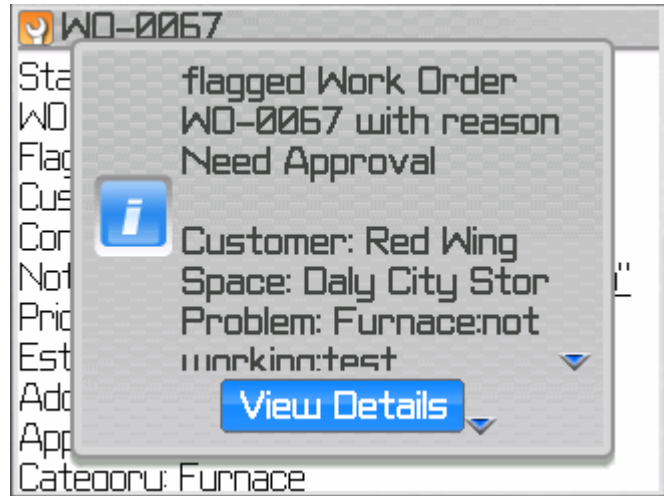
Pick Up a Work Order

After logging in through the mobile device, the tech typically reviews the My Work list, then picks up an order. To pick up a work order, the tech changes the order's status through the mobile device. The dispatcher can view the Picked Up status on the dispatch board and map.

Dispatchers may enter a work order with an Emergency priority. Emergency work orders not only reflect on the tech's My Work list, but also show as an alert on the mobile device (if the tech is configured to receive alerts).
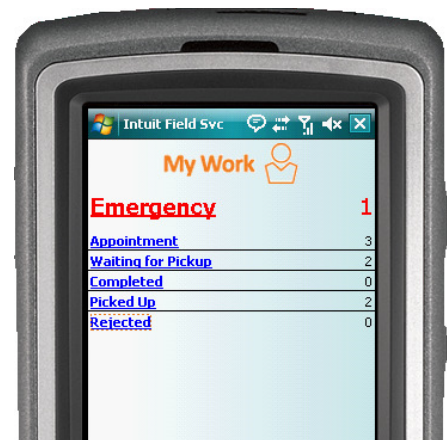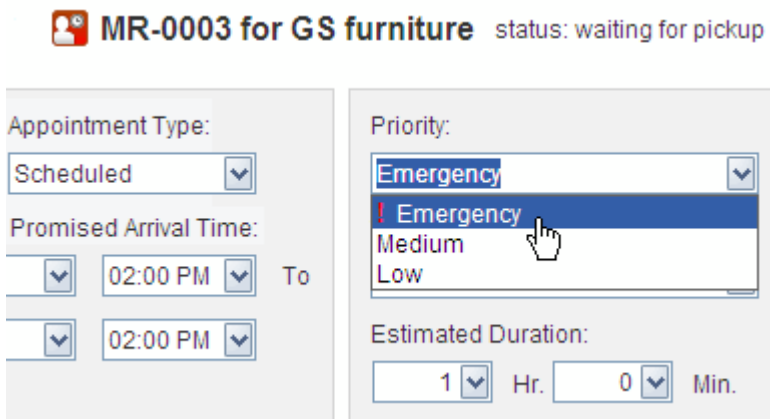
Figure 6:

The dispatcher sets the priority of a work order when it is created
and may update the priority as needed (above).

An Emergency priority work order appears at the top of a tech's
My Work list (right). The tech also receives an Emergency alert (if
the tech is configured to receive alerts).

Note: The Emergency category cannot be hidden from My Work. It appears on the mobile device only
when a tech is assigned an Emergency priority work order and is configured to receive alerts.

Setting ETA

Both the tech and the dispatcher can set a flag, change status, and set an ETA (Estimated Time of Arrival)
for a work order. Typically the tech sets the ETA after changing a work order status to En Route. Once
ETA is set, the dispatcher can view it through the dispatch board map and web application (see figure 7).
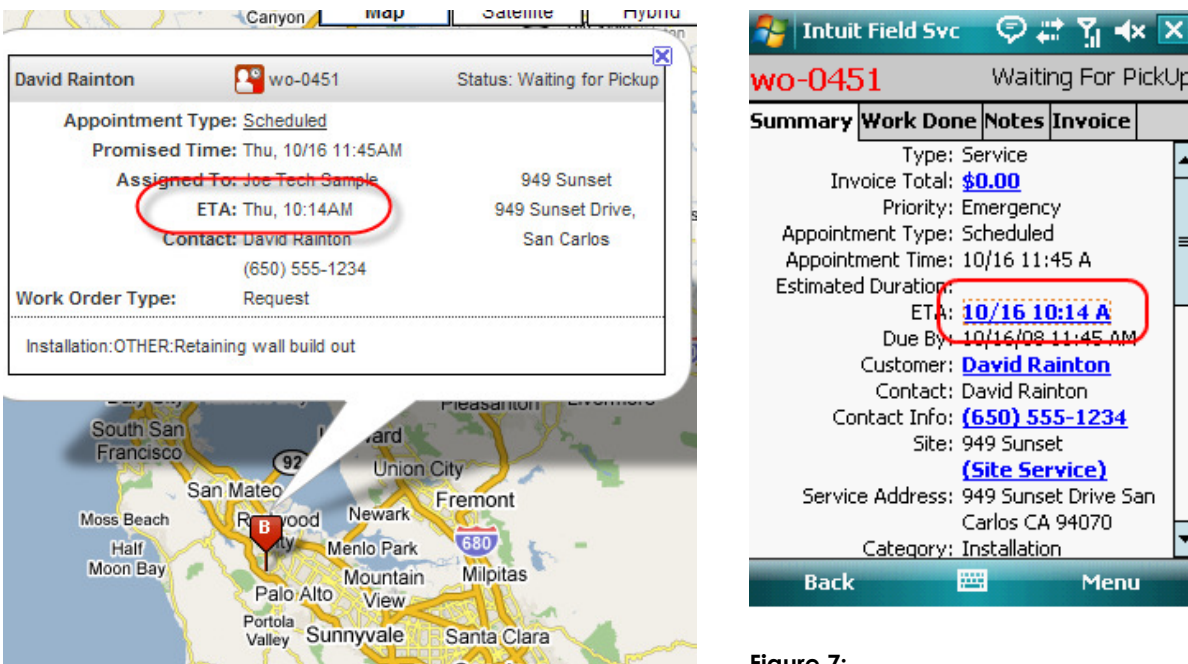
Figure 7:

Flags, status, and ETA can be set and
viewed by both the field tech through a
mobile device (above)...

and the dispatcher, through the map (left)
as well as other areas of the Field Service
Management web application.

Starting the Work Order

Once the tech arrives at the work location, the tech changes the work order status to Start through the mobile device. The dispatcher receives the updated status, which reflects on the dispatch board through the Map view, Schedule view, and List view. When a tech changes the status of a work order in any way, the dispatcher can view the change. Status options available to the tech are:

- Pick Up (or Pick Up and Start)
- En Route
- Start/Pause
- Reject
- On Hold or Cancel (Re-Open)
- Completed

Note: The En Route status may not be necessary for all jobs. Work orders can be picked up and started immediately. For example, this might occur if the tech is already on location and ready to work.
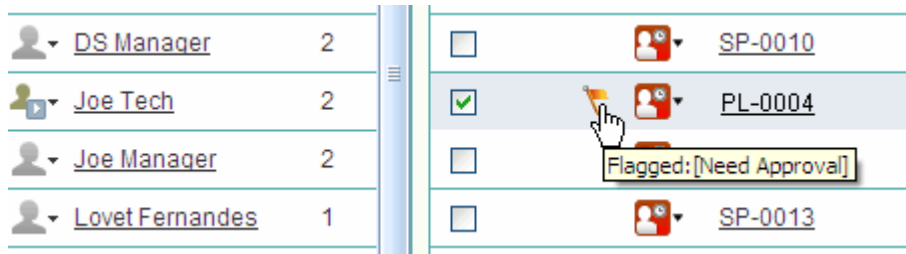
Figure 8:

When a tech Starts a work order by changing its status through the mobile device (left)…
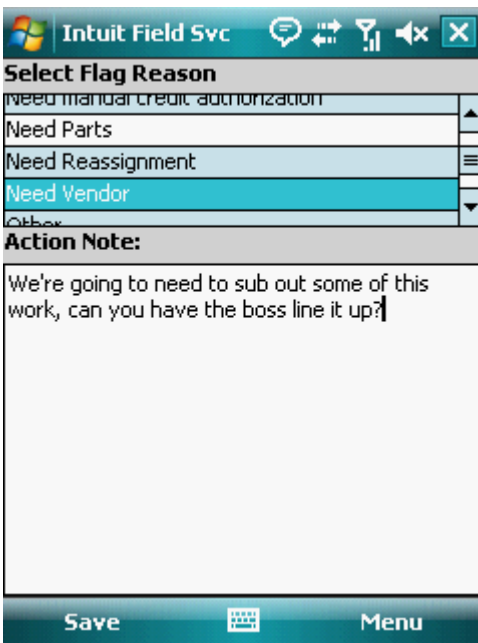
The dispatcher can view the status on the dispatch board in several ways, such as by switching to Schedule view and hovering over the job on the schedule board (above).

Flagging a Work Order

Occasionally a problem occurs at the job site. If the tech requires assistance but can continue working, the tech may want to set a Flag. For example, the tech may need a supervisor's opinion or approval on some aspect of the job. In cases such as this, the tech sets a flag on the work order through the mobile device. This flag reflects both on the dispatcher's board and the field supervisor's mobile device.

Figure 9:

When a tech sets a flag on a work order and enters notes through the mobile device (left)...

The flag status appears as a flag in the List view on the dispatch board (above). The dispatcher can read the flag notes through the work order detail view.

Completing a Work Order

Once a job is completed, the tech enters a Work Done description, checks off work completed through Problem Disposition, updates any tracked equipment maintenance, then changes the work order's status to Completed. The tech may then create an invoice in the field.

The dispatcher sees that the job has been completed through the dispatch board. This information updates automatically in the web application when the job status is updated and Submitted from the mobile device. All information entered by the tech about the completed job is available to the dispatcher through work order details.

Once the job is completed, the tech is free to Pick Up another job. As the tech travels between jobs, GPS updates will reflect on the dispatcher's map showing a "bread crumb" trail of the tech's locations throughout the day. By default, GPS fixes automatically record every 20 minutes on the dispatcher's map.
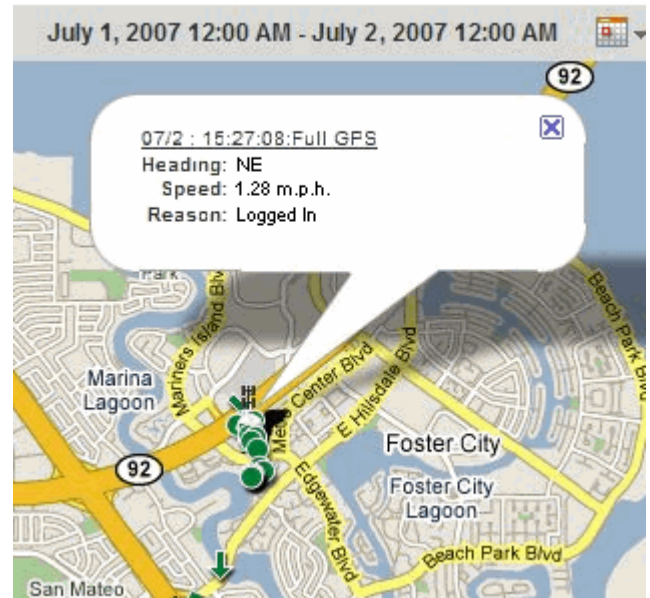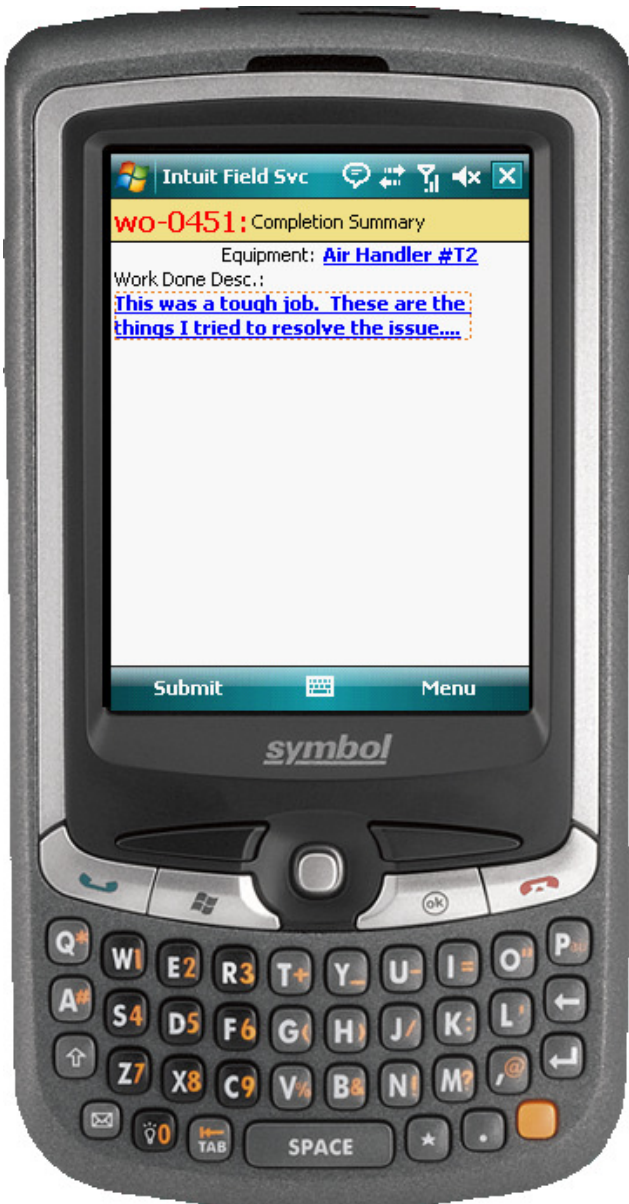

Figure 10:

Once a tech completes a work order (left) and moves on to a new job…

The dispatcher will be able to view the updated status as well as a "bread crumb" trail of GPS fixes that the tech leaves when traveling between jobs (above).

Troubleshooting

Technical Support:

Phone

Field Service Management: 1.800.517.2871 (toll-free)

Email

support@corrigo.com