

WORKTRACK™

Service Management

Interacting with the Dispatcher Through A Mobile Device

User Guide

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Interacting with the Dispatcher -- User Guide

Before You Begin

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

- You have a valid URL, user ID, and password for your Corrigo WorkTrack product, acquired either through free-trial or purchase.
- 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 WorkTrack 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).
- Your company's techs are already familiar with the basic operation of the mobile devices that you have elected to use in conjunction with WorkTrack Service Management.

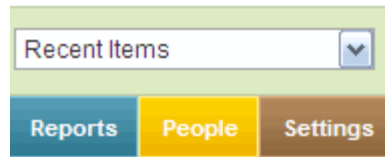
Using This Guide

- Appearance:** Since your company can customize WorkTrack 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 WorkTrack 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 Pocket PC device supported by WorkTrack, as well as any supported peripheral device that connects to a supported BlackBerry or Pocket PC (see System Requirements in this section).
System Administrator:	This is the person at your company who manages your WorkTrack Service Management web application. The term System Administrator is used in this guide.
Dispatcher	Person who operates the WorkTrack Service Management Dispatch Board.
Tech/Field Tech	Person who uses WorkTrack on a mobile device and services customers in the field.

WorkTrack Onscreen Conventions

How Do I? Integrated into WorkTrack 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 WorkTrack screen.



[How Do I?](#)

Activity Center: The WorkTrack 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:

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

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

BlackBerry and Windows Mobile primary hardware requirements:

- BlackBerry handsets that can run OS version 4.1 or higher.
- Windows Mobile Standard (also known as SmartPhone) and Windows Mobile Professional (also known as PocketPC).

For a full list of supported devices see <http://www.worktrack.com/service/buyitnow/> and proceed through the wizard until you see the Explore Devices button. WorkTrack can work with a mixed fleet of devices, so that each person can elect a supported device of their choice.

Peripheral Hardware requirements:

Printing: In order to print jobs or invoices in the field, a Bluetooth mobile printer must be paired with the device. These printers are supported:

- Citizen CMP-10 BT
- Zebra RW420

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

WorkTrack Service Management allows field techs and dispatchers to interact with each other through the tech's mobile device. By taking advantage of WorkTrack and mobile device features, the field techs and dispatcher can work together to:

- Respond quickly to emergency customer service requests
- React immediately to problems on the job
- 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 WorkTrack, refer to the Corrigo Mobile Client for BlackBerry (or Pocket PC) user guides.



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

Points of Interaction

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

Note: Information synchronizes between the WorkTrack 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 (this value is configurable in Mobile Settings).

Dispatcher ◀- ▶ Field Tech Communication in the Work Order Process

A Field Tech typically does this...

This communication typically occurs...

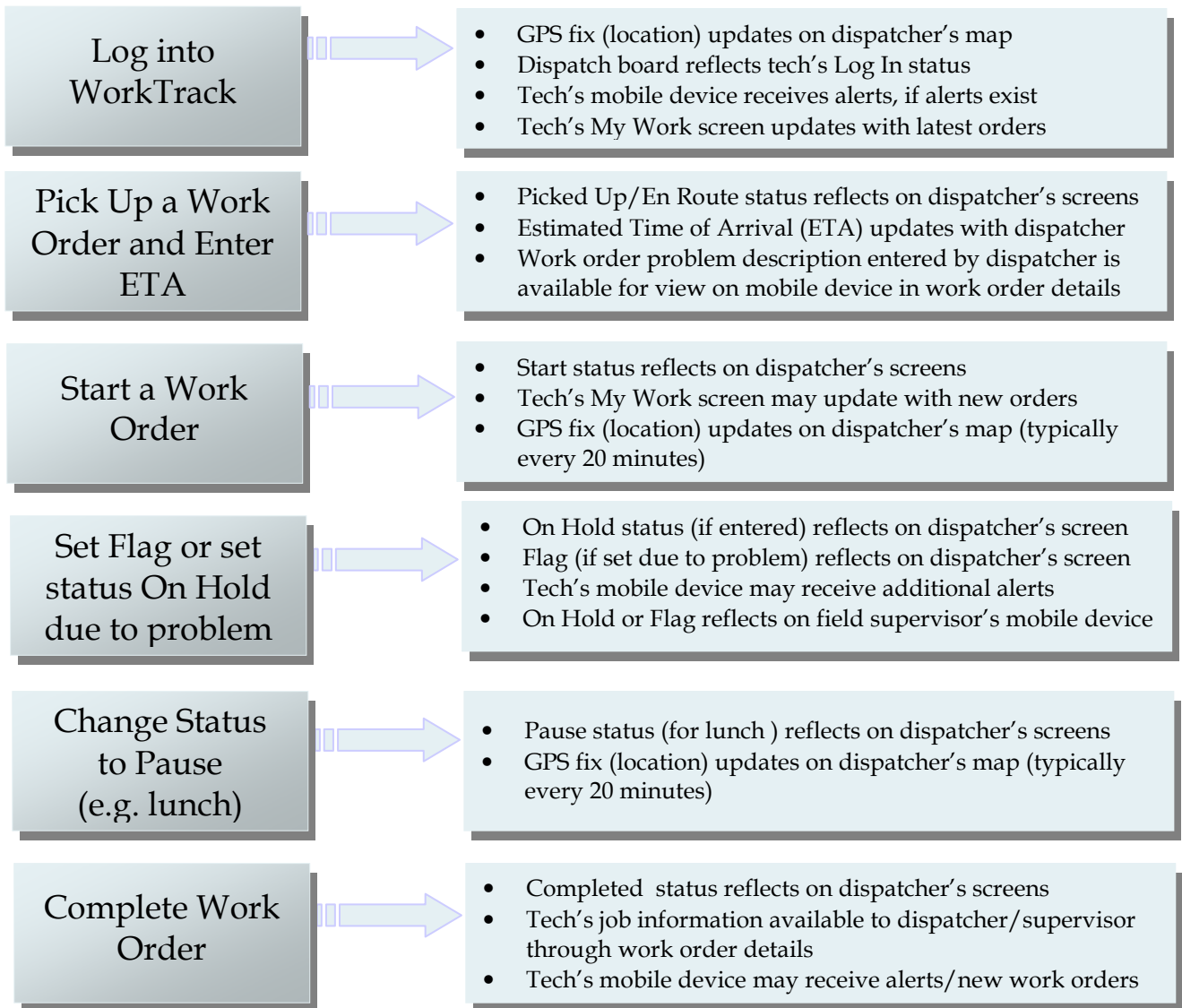


Figure 3: Common points of mobile device interaction within the typical work order process

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 WorkTrack. Several events are triggered:

- The dispatcher receives a GPS fix on the tech, which reflects on the dispatch board map (if device is GPS capable)
- The tech receives a list of work orders on the WorkTrack 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 WorkTrack 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.



	Joe Torque	0
	Rodney Wrench	0
	Pat Jones	0
Logged In		

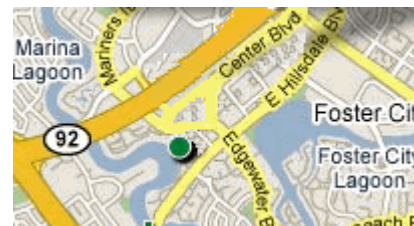


Figure 4:

The tech logs into WorkTrack from a mobile device (left).

Immediately 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 (see map above).

Receiving Alerts

Alerts are sent to a mobile device if the tech user is configured to receive alerts. Alerts can be sent at any time. Alerts may be received on the mobile device when the tech first logs into WorkTrack as well as periodically throughout the day.

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

Pickup Up a Work Order

After logging in through a mobile device, the tech typically reviews the My Work list, then picks up an order. To pick up a work order, the tech changes its 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).

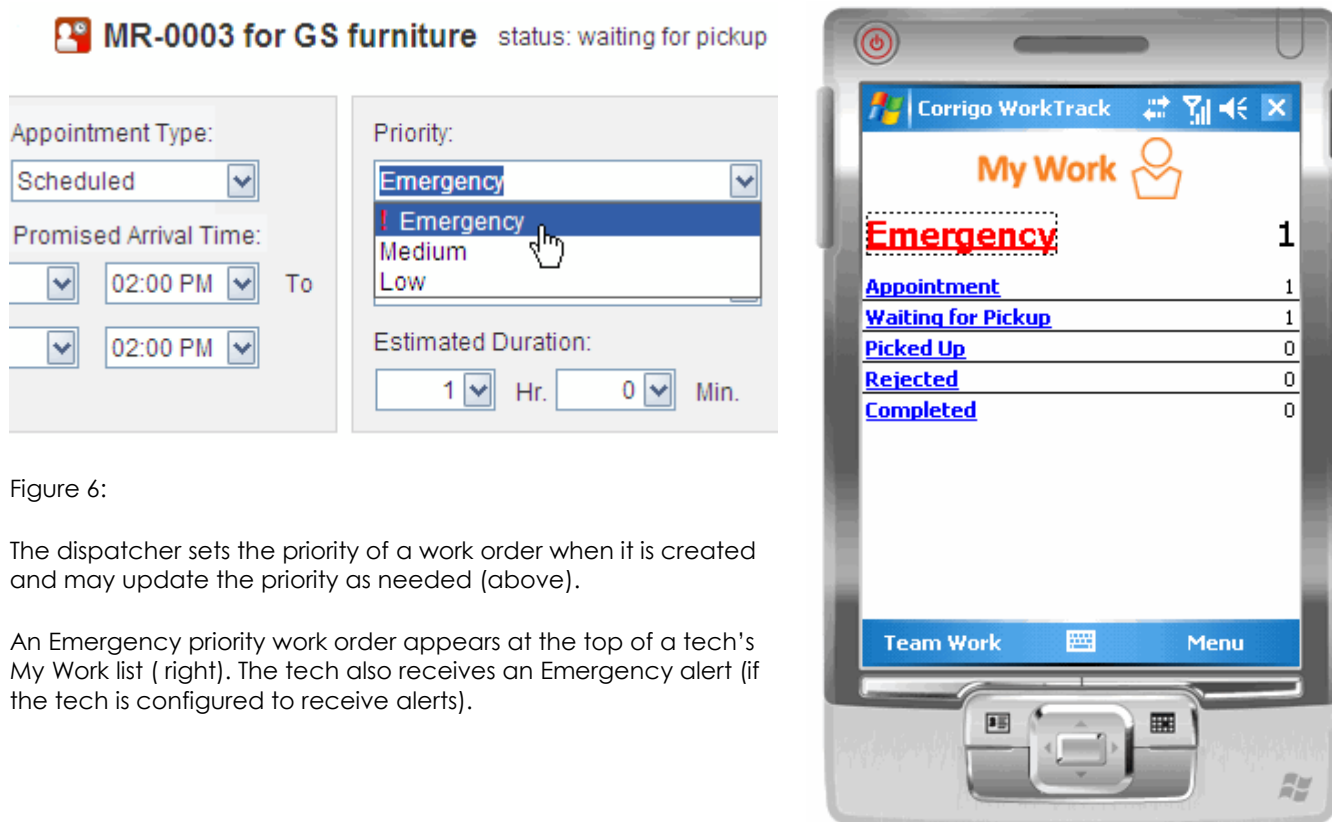


Figure 6:

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).

Note: Any information that you change through work order details from a mobile device will update immediately. For example, if you change the ETA on a work order from your mobile device, the dispatcher will be able to view the updated ETA as soon as you Save it. There is no time delay for synchronization as long as the mobile device is in cellular coverage.

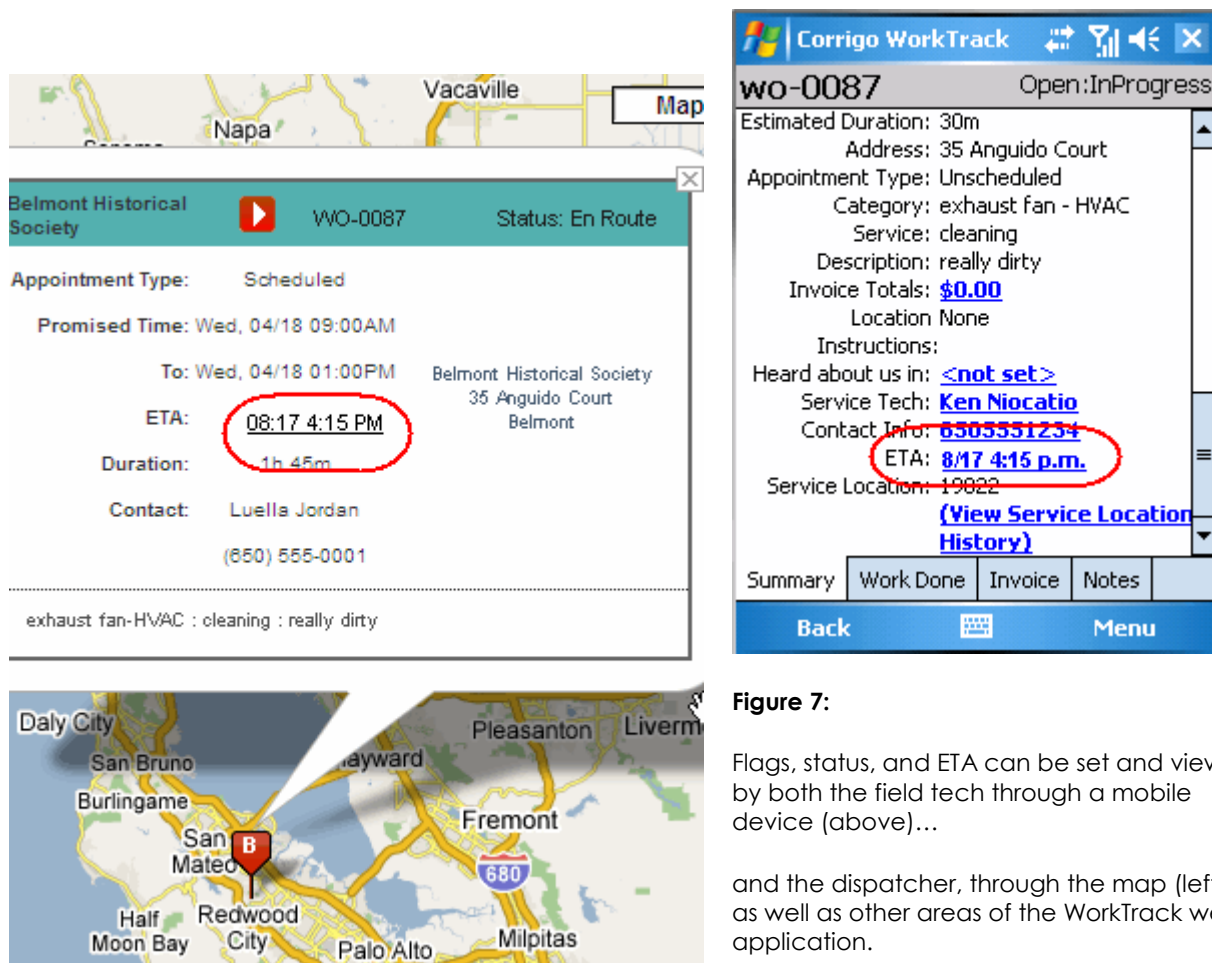


Figure 7:

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 WorkTrack 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.

The screenshot displays a dispatcher's software interface. At the top, there is a 'New' button, a 'Filter' dropdown set to 'Work Team', and a search box containing 'ZS Service Team 1'. Below this are 'Schedule' and 'List' tabs. On the left, a 'Show Map' button is visible. A central panel shows a job card for 'Costco' with ID 'PL-0004'. The job card details include:

- Appointment Type: Scheduled
- Promised Time: Fri, 08/24 08:00PM
- To: Fri, 08/24 08:30PM
- ETA: --/-- --/--
- Duration: 4h 0m
- Contact: James Wills (123) 123-1234
- Address: 100 Metro center blvd, Foster City
- Category: sp category:OTHER:Broken insulation screen

 The status 'Status: Work Started' is circled in red. A red arrow points to this status with the text 'Work Started status appears on dispatcher's Schedule View'. On the left side of the interface, there is a 'Select Workmen' section with a list of workmen:

- Danny Dispatcher (0)
- Fill FieldSupervisor (0)
- Joe Tech (2)

 A green bar at the bottom of the job card indicates the assigned workman 'Costco'.

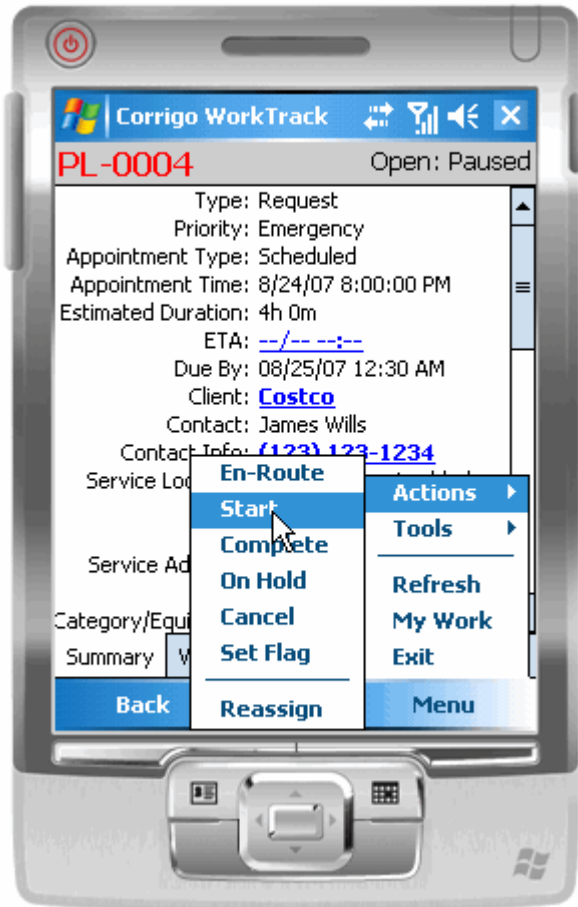


Figure 8:

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.

<u>DS Manager</u>	2	<input type="checkbox"/>	<u>SP-0010</u>
<u>Joe Tech</u>	2	<input checked="" type="checkbox"/>	<u>PL-0004</u>
<u>Joe Manager</u>	2	<input type="checkbox"/>	<u>SP-0013</u>
<u>Lovet Fernandes</u>	1	<input type="checkbox"/>	

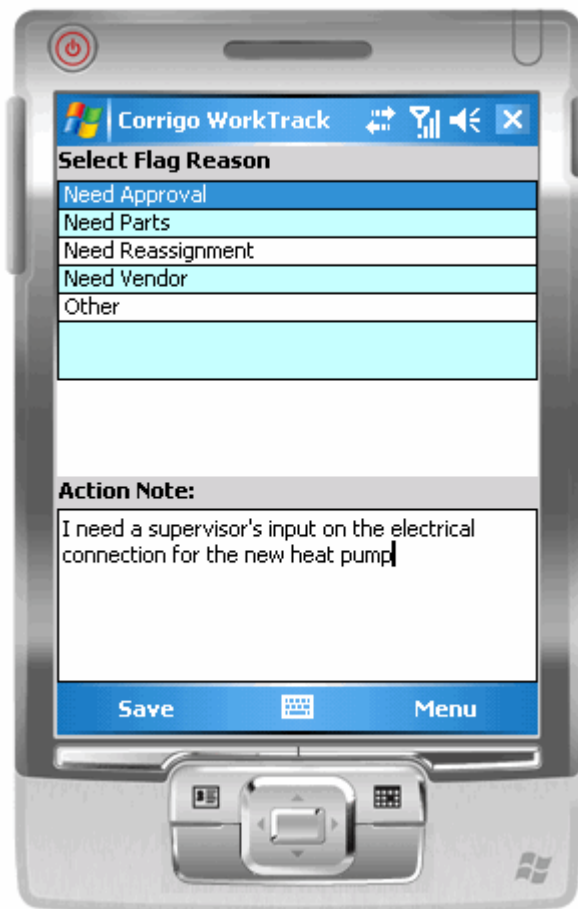


Figure 9:

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 work is completed, the tech used the mobile device to:

- Enter a Work Done description
- Check off work completed through Problem Disposition
- Update any tracked equipment maintenance
- Change the work order status to Completed

The tech may then create an invoice in the field.

The dispatcher sees the Completed status on the dispatch board. All updated work order details are also available to the dispatcher when the completed work order is submitted from the mobile device.

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.

Note: By default, GPS fixes automatically record every 20 minutes on the dispatcher's map.

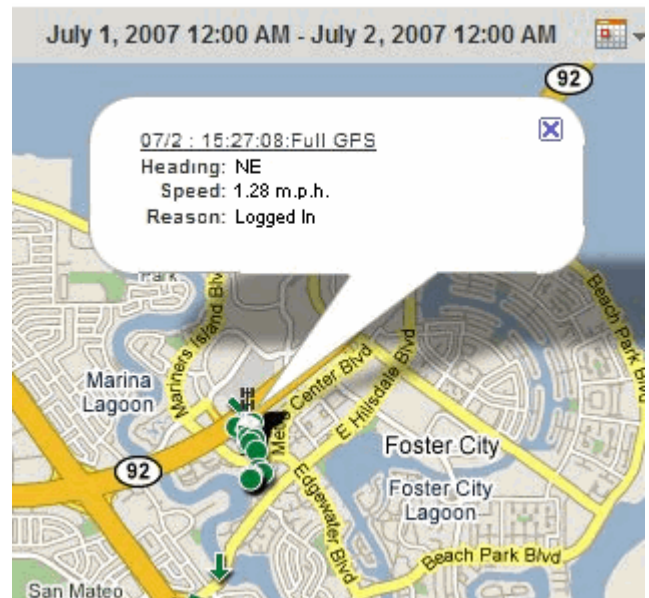
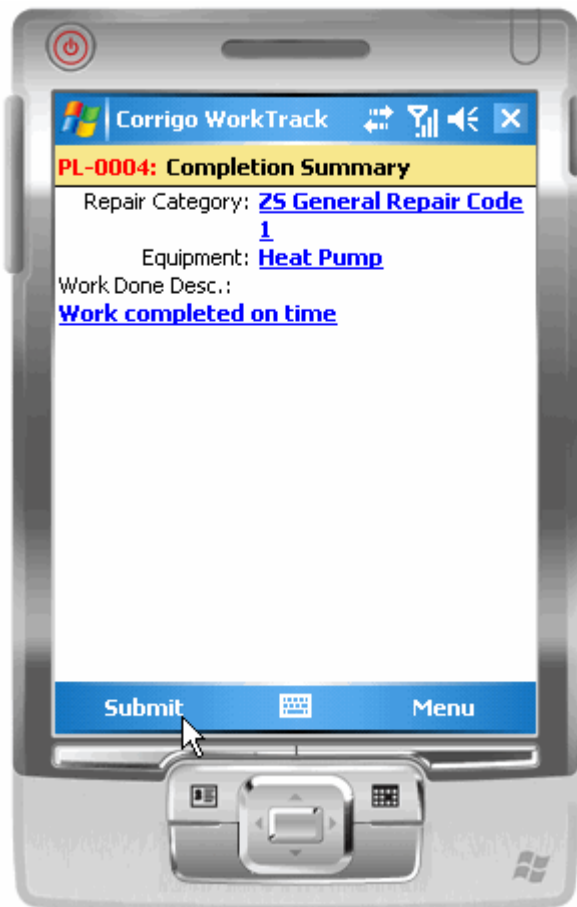


Figure 10:

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

877-701-8326 (toll-free)

Email

support@corrigo.com