



User Guide

QAD Field Service Scheduler

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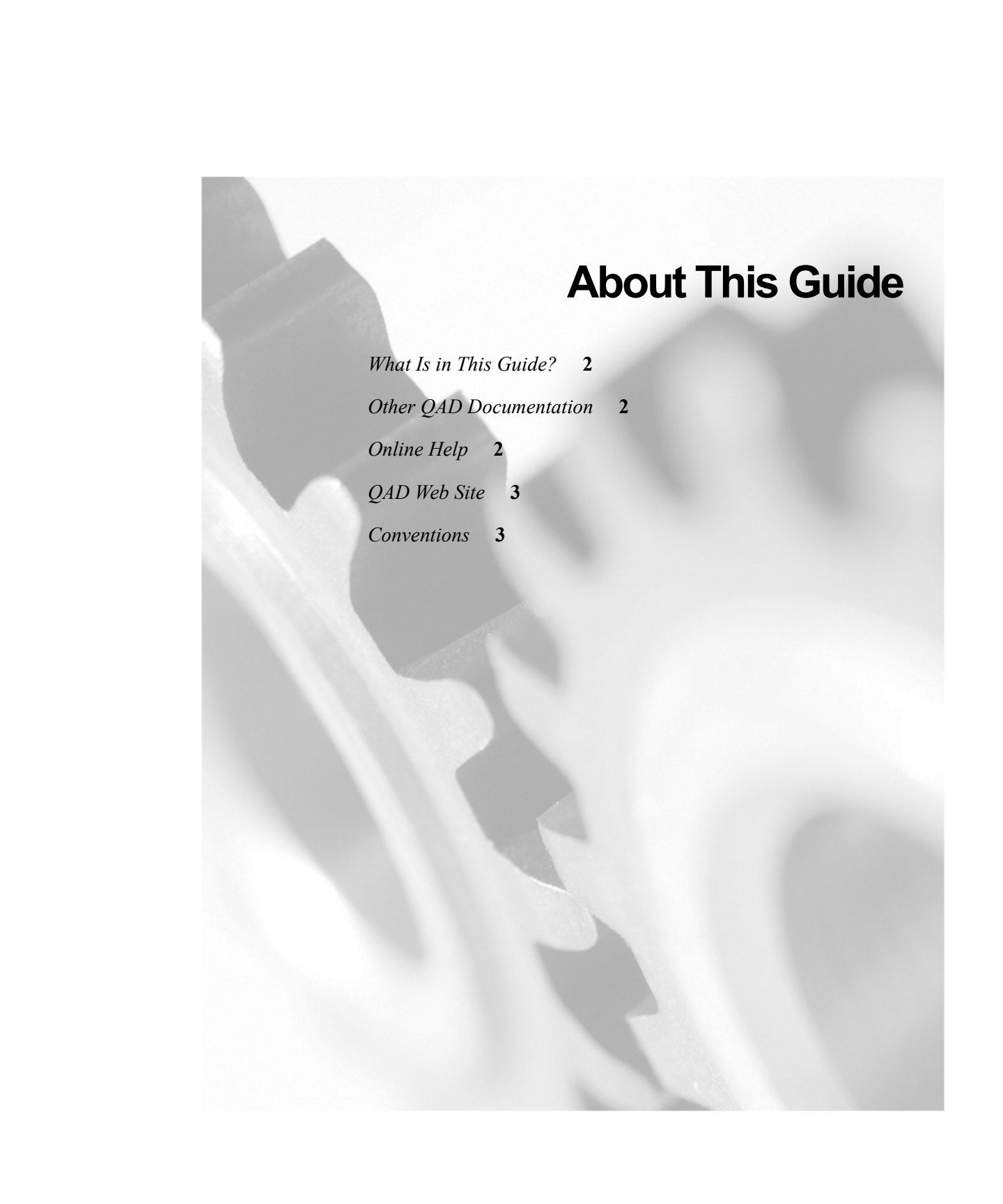
QAD Inc.

100 Innovation Place
Santa Barbara, California 93108
Phone (805) 684-6614
Fax (805) 684-1890
<http://www.qad.com>

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The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that they appear to be meshing together. The lighting creates highlights and shadows on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

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What Is in This Guide?

This guide describes the QAD Field Service Scheduler (QAD FSS) 3.0 for use with multiple versions of QAD's ERP application. QAD FSS enables dispatchers to schedule visits by field service engineers.

This guide assumes prior knowledge of the QAD Service and Support Management (SSM) module. For details, refer to *User Guide: Service/Support Management*.

Other QAD Documentation

QAD provides other documentation you may find useful.

- For an overview of new features and software updates, see the *Release Notes*.
- For software installation instructions, refer to the appropriate installation guide for your system.
- For conversion information, refer to the *Conversion Guide*.
- For an overview of system features and instructions on navigating the user interface, see *User Guide: QAD User Interfaces*.
- For detailed information on using system features, refer to the relevant user guide.
- For technical details, refer to *Entity Diagrams* and *Database Definitions*.

For a complete list of QAD documentation, visit the QAD Support site.

Online Help

QAD FSS provides an extensive online help system. For information on using the help system in different environments, refer to *User Guide: QAD User Interfaces*.

QAD Web Site

The QAD Web site provides a wide variety of information about the company and its products. You can access the Web site at:

<http://www.qad.com>

For users with a QAD Web account, product documentation is available for viewing or downloading from the QAD Online Support Center at:

<http://support.qad.com/>

You can register for a QAD Web account by accessing the Web site. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Most user documentation is available in two formats:

- Portable document format (PDF) files can be downloaded from the QAD Web site to your computer. You can view and print them with the free Adobe Acrobat Reader.
- HTML files let you view user documentation through your Web browser and use search tools for easily locating topics of interest.

Conventions

Screen Illustrations

System functions are available in a feature-rich .NET-based graphical user interface (UI). All screenshots in the documentation show the QAD .NET UI.

The user guide text follows the navigation model of the QAD .NET UI for moving from one screen to the next.

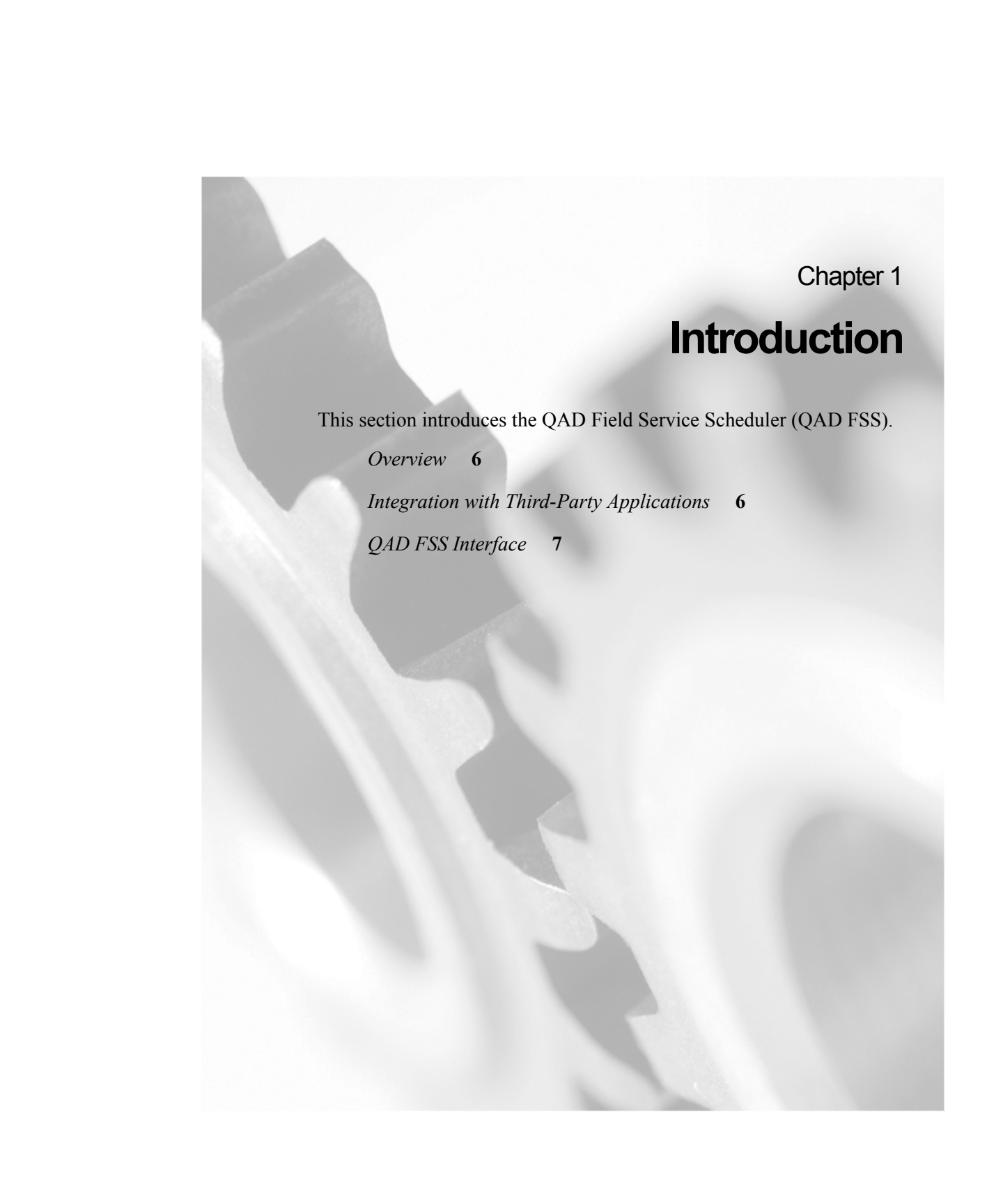
For complete keyboard command summaries for UI navigation, refer to the appropriate chapters of *User Guide: QAD User Interfaces*.

Typographic

This document uses the text or typographic conventions listed in the following table.

If you see:	It means:
monospaced text	A command or file name.
<i>italicized monospaced text</i>	A variable name for a value you enter as part of an operating system command; for example, <i>YourCDROMDir</i> .

If you see:	It means:
indented command line	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

The background of the page features a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that creates a sense of depth and mechanical complexity. The lighting is soft, highlighting the teeth of the gears and creating subtle shadows.

Chapter 1

Introduction

This section introduces the QAD Field Service Scheduler (QAD FSS).

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Overview

QAD Field Service Scheduler (QAD FSS) is a tool that enables service dispatchers to schedule visits for engineers per service calls. QAD FSS provides a Gantt type scheduling chart that enables dispatchers to schedule service calls easily using drag-and-drop functionality.

In addition, the intuitive interface provides views of all available resources, such as engineers and spare parts, as well as the ability to dynamically adjust schedules based on estimated engineer arrival time at a customer site.

The scheduling of service visits is made within the constraints defined by the service contract between the organization and customer.

Geographical maps can be integrated with QAD FSS in order to provide travel time and distance calculations for service calls. These maps also enable locations to be plotted for engineers, service calls, and spare parts.

QAD FSS appears on the QAD application menu in the .NET UI as Field Service Scheduler (11.1.17.1); the program name is `fsfss.p`.

Note In order to run QAD FSS, you must enable a license code in your QAD ERP application. For details, refer to *Installation Guide: Progress Database*.

Integration with Third-Party Applications

In order to use the features of QAD FSS that are map-based, Microsoft MapPoint must be installed on each client.

If Microsoft MapPoint is not installed, the features of QAD FSS that are not map-based remain unaffected.

Software Requirements

In order to use QAD FSS, your QAD ERP database server and client must meet the following minimum requirements described in this section.

QAD ERP Database Server

- Operating system can be Windows, Linux, or UNIX. For details on requirements for QAD Enterprise Applications, refer to *Installation Guide: Progress Database*.
- Progress OpenEdge 10.1C03 or above.
- SSM module in MFG/PRO eB2.1 SP4 or any of the following versions of QAD Enterprise Applications: 2007, 2007.1, 2008 SE, 2008.1 SE, 2009 SE, 2009 EE, or 2009.1 EE.

Client

- Microsoft Windows operating system. Refer to the *QAD .NET UI Release Notes* and *User Guide: QAD User Interfaces* for details about operating system requirements.
- QAD .NET UI version 2.5.3 (eB2.1 SP4-6), 2.7.3 (2008 SE and 2008.1 SE), 2.8 (2009 EE), 2.8.1 (2009 SE), or 2.8.2 (2009.1 EE).
- Microsoft .NET Framework (included with client install).
- Infragistics NetAdvantage for .NET 2007 vol 3 (included with client install).
- ComponentGo CalendarGo 6.3.8 (included with client install).
- Microsoft MapPoint 2006 or 2009 (optional).

Note Microsoft MapPoint must be installed in order to take advantage of the QAD FSS mapping features.

QAD FSS Interface

This guide describes any features and capabilities of the QAD FSS interface that are not standard in other QAD ERP application modules.

For details about the .NET UI, refer to the *User Guide: QAD User Interfaces*.

Right-Click Menus and Commands

QAD FSS has several right-click menus that give you access to context-appropriate commands. Table 1.1 lists all right-click menus and their commands.

Table 1.1
Right-Click Menus

Access from...	Command	Action
All Calls browse	Call Comments	Displays the Call Comments dialog.
	Reminders	Displays the Reminders dialog.
	Plot Calls on Map	Plots selected service call or all service calls on the map and displays the Geography Map tab.
	View Tabs	Displays the tab you select.
Gantt Chart - Scheduling	Plot on Map	Contains commands for plotting the location of the service call, the home address of the selected engineer, the addresses of all engineers, an engineer's route, and driving directions for a selected engineer.
	View Tabs	Displays the tab you select.
	Delete Visit	Deletes the selected visit.
	Engineer Visits for a Day	Displays the visits scheduled for the engineer for the selected day.
	Modify Visit Details	Displays the Update Visit Details dialog.
Call Details	Right-click the Reminders section	Displays the Reminders dialog.
Geography Map	Refer to the Microsoft Map Point user documentation.	
Part Details	Show Engineer's Route on Map	Plots the engineer's route on the map and displays the Geography Map tab.
	Show Inventory Location on Map	Plots the location of the spare part on the map and displays the Geography Map tab.

Float

In QAD FSS you can float tabs so that each tab displays in its own window. You can then move these windows around the screen as required.

To float tabs, click the Window control on the top-right corner of the FSS screen and choose Float.

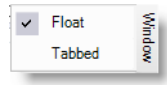
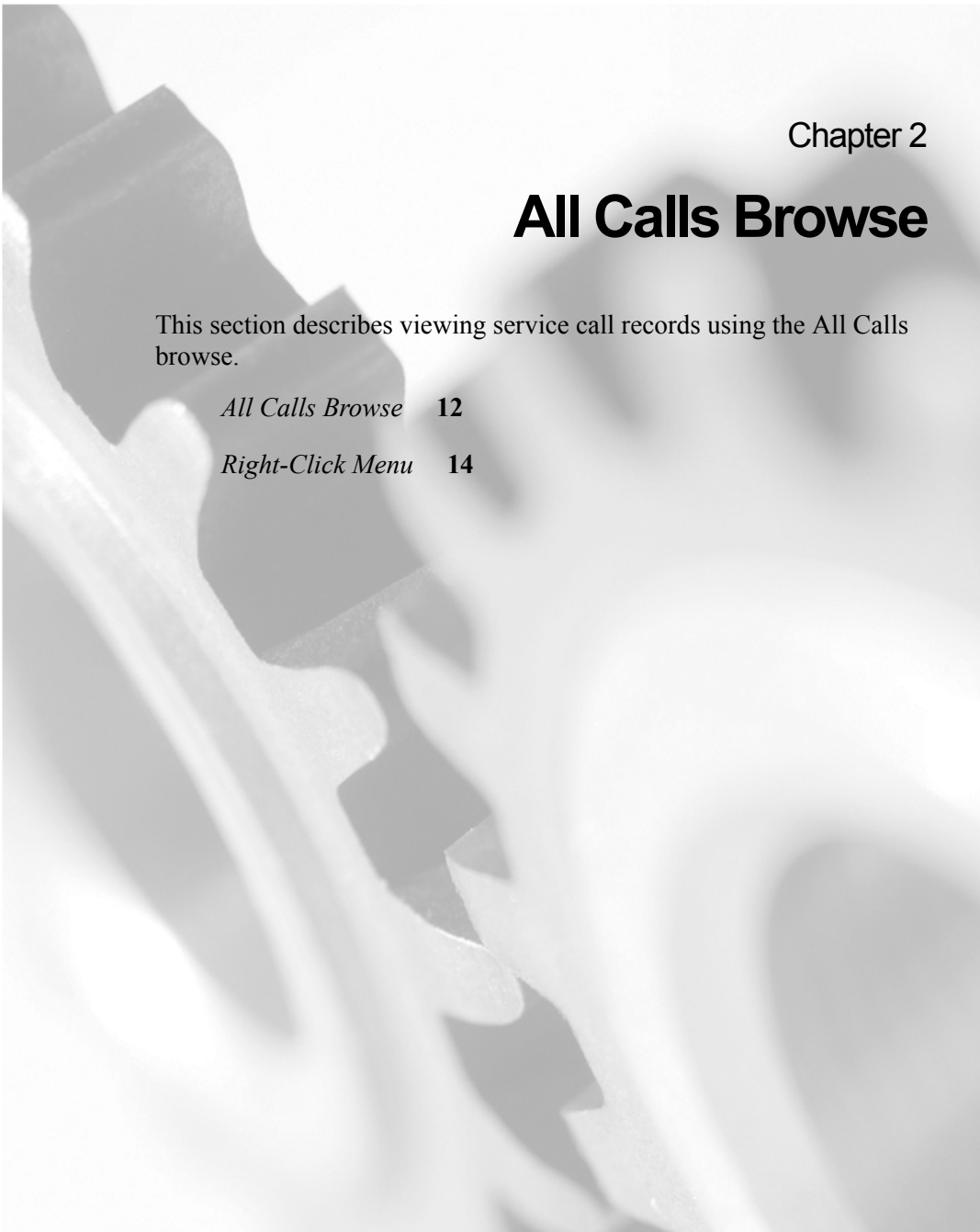


Fig. 1.1
Window Control

You can display a floating window on top of other windows by clicking the name of the window on the right-hand side of the QAD FSS screen. To close a floating window, click the Close control at the top-right hand corner of the window.

To restore all floating windows to tabs, click the Window control and choose Tabbed.



Chapter 2

All Calls Browse

This section describes viewing service call records using the All Calls browse.

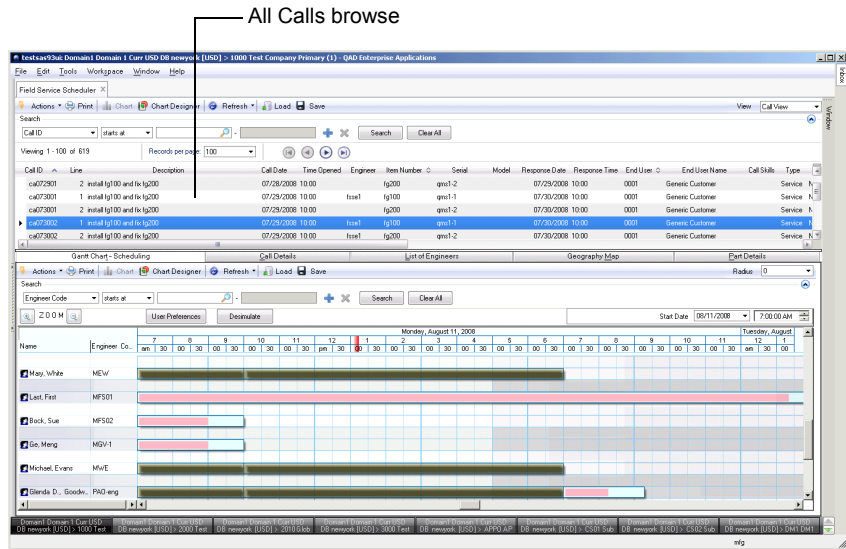
All Calls Browse **12**

Right-Click Menu **14**

All Calls Browse

Use the All Calls browse to view service call records. The All Calls browse occupies the top portion of the QAD FSS screen and displays service calls as defined in Call Maintenance (11.1.1.1) in the SSM module.

Fig. 2.1
All Calls Browse

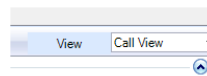


Service call records are displayed at the call line level. A service call record consists of a header and one or more service call lines, thus a single call may have multiple scheduled service calls. Call lines represent service calls, not scheduled visits. All call lines for a single service call have the same end user, but may be for different items. Times in the All Calls browse display using the server time zone.

The All Calls browse has a right-click menu that lets you add comments and reminders to service calls, as well as plot calls on the map. For details see “Right-Click Menu” on page 14.

Use the View drop-down menu at the top-right corner of the All Calls browse to select the view you want.

Fig. 2.2
View Drop-Down
Menu

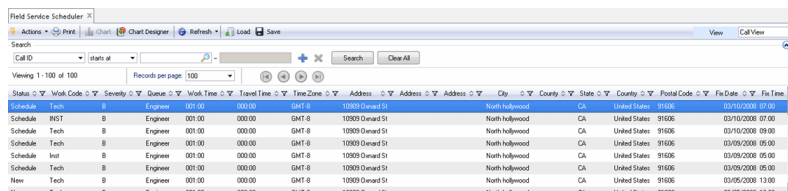


The All Calls browse has two views:

- Call View
- Engineer View

Call View

Use the Call View to schedule engineers by reviewing the priority of calls that need servicing. The All Calls browse can be sorted by severity, status, or response time.



Status	Visit Code	Severity	Queue	Queue Time	Travel Time	Time Zone	Address	City	County	State	Postal Code	Visit Date	Visit Time
Schedule	Item	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/10/2008	07:00
Schedule	INST	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/10/2008	08:00
Schedule	Tech	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/10/2008	09:00
Schedule	Tech	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/10/2008	05:00
Schedule	Inst	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/10/2008	05:00
Schedule	Tech	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/10/2008	05:00
New	Tech	8	Engineer	00:00	00:00	GMT-8	10000 Deward St	North Hollywood	CA	United States	91606	03/05/2008	13:00

Fig. 2.3
All Calls Browse -
Call View

The Visits column indicates if there is at least one visit scheduled for the call line. The Reminder column indicates if the call line has a reminder that has passed the dispatcher's current date and time. For details on reminders see "Reminders" on page 15.

Call View has a quick filter that enables you to search service call records employing commonly used parameters such as call ID, item number, serial number, end user, engineer, postal code, and visit ID.

When scheduling a visit, you can use the Response Date and Response Time columns to determine which call lines require a visit to be scheduled, and in what order. The Response Date indicates the date on which the engineer is required to visit the end user location as specified by the service level agreement (SLA). You can click the column header to sort the call lines in ascending order to display the call lines that require action first.

Note An SLA is a formal agreement (contract) between two parties, typically a customer and service provider. The SLA defines the type and level of service to be provided, which typically includes considerations such as responsibilities, guarantees, and so on.

For details on filtering records, see "Using Browsers and Lookups in the QAD .NET UI" in *User Guide: User Interfaces*.

Engineer View

Use the Engineer View to view service call records from an engineer's perspective. The dispatcher can use this view to manage utilization of engineers and ensure that all engineers have assigned visits on which to work.

Fig. 2.4
All Calls Browse -
Engineer View

Call ID	Line	Description	Call Date	Time Opened	Response Date	Response Time	Engineer	Item Number	Social	End User	End Line Name	Call Skills	All Skills Matched	Sort
casch001	1		03/07/2008	06:00	03/10/2008	06:00	lucel	FG100	F5SLN1581	0001	00010000		No	
casch001	2		03/07/2008	06:00	03/10/2008	06:00	lucel	FG200	F5SLN1582	0001	00010000		No	
casch002	1		03/07/2008	08:00	03/10/2008	08:00	lucel	FG200	F5SLN1582	0001	00010000		No	
casl00000	1		03/06/2008	10:00	03/09/2008	04:00	lucel	FG100	F5SLN1581	0001	00010000		No	
casl00000	2		03/06/2008	18:00	03/09/2008	04:00	lucel	FG200	F5SLN1582	0001	00010000		No	

Use the Engineer, Future Call Location, and/or Radius filters to view only those call line records that match the criteria you select:

Engineer. Select an engineer code.

Future Call Location. Select an engineer/city location combination. The city represents the engineer's home address.

Note The selections that display on the drop-down list are restricted to service call records associated with the engineer code you select.

Radius. Select a maximum radius in which the end user (customer) service call must occur.

Click Go to apply your filter to the browse.

Right-Click Menu

Right-click a service call record in the All Calls browse to display a right-click menu that lets you add comments and reminders, as well as plot calls and view tabs. For a complete listing of right-click menus and commands in QAD FSS, see “Right-Click Menus and Commands” on page 7.

Call Comments

Enter a comment in the Call Comments box. Click Save to save your comment.

Reminders

A reminder lets the dispatcher add a reminder note to the service call line. The Reminders box displays all reminders for the selected service call record.

Reminder Date	Reminder Time	Call Line	Description	Reminder Closed
03/06/2008	0900	1	reminder for line...	☐

Basic Details

Reminder Date: 3/ 6/2008

Reminder Time: 09:00 AM

Status: Open

Description: reminder for line1 of c10001

Buttons: Add, Delete, Save, Cancel

Fig. 2.5
Reminders Box

Reminder Date. Enter a date on which the reminder should occur.

Reminder Time. Enter a time at which the reminder should occur.

Status. Select a status of Open or Close.

If the reminder is not closed before the reminder date and reminder time passes, an X displays in the Reminders column for the call line to indicate that the reminder has passed.

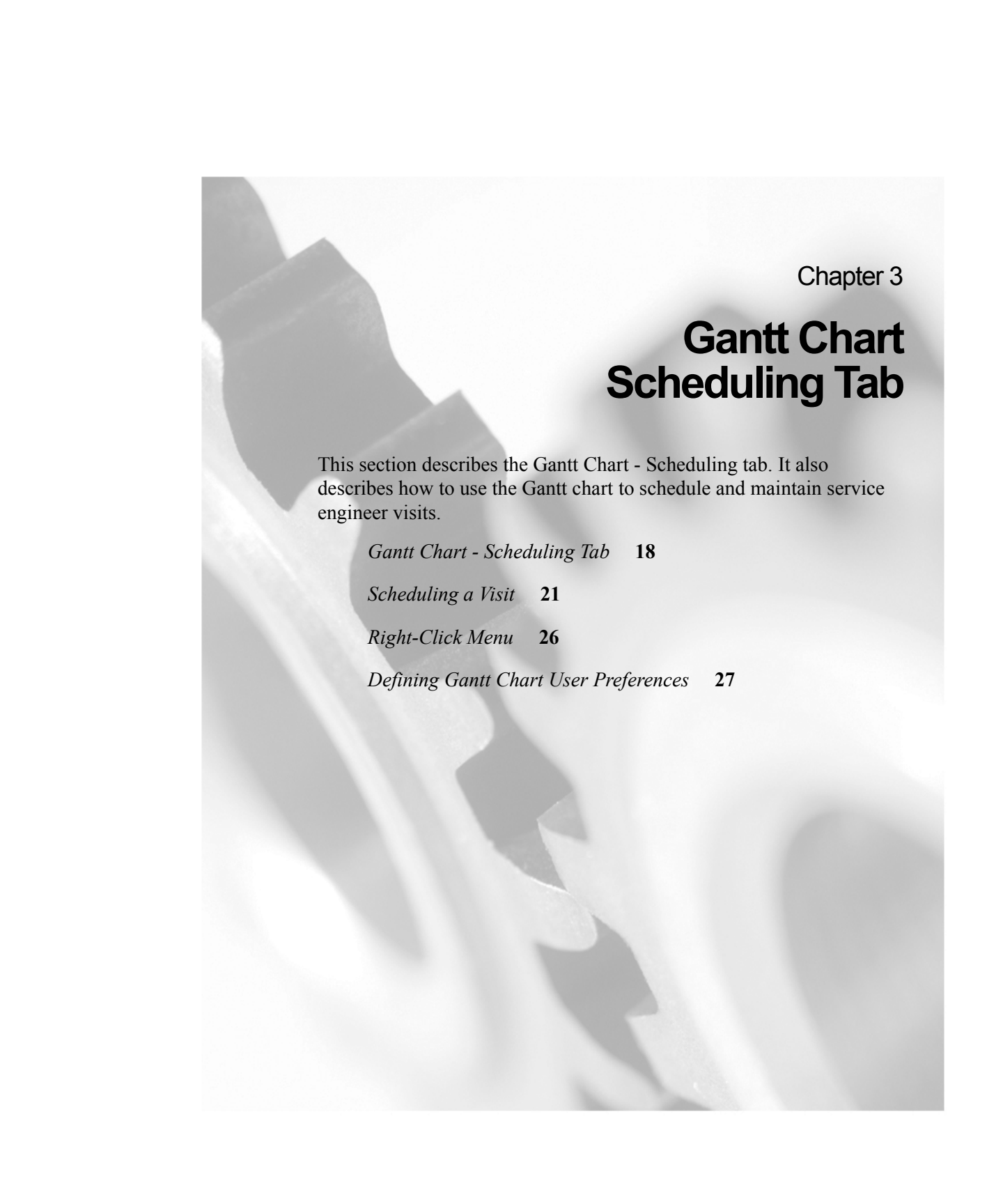
Description. Enter notes as required.

Plot Calls on Map

Choose the Selected command to plot all selected service calls on the Geography Map tab. Choose the All Calls command to plot all calls.

View Tabs

Choose the name of the tab you want to view.

The background of the page features a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that creates a sense of depth and mechanical complexity. The lighting is soft, highlighting the teeth of the gears and casting gentle shadows.

Chapter 3

Gantt Chart Scheduling Tab

This section describes the Gantt Chart - Scheduling tab. It also describes how to use the Gantt chart to schedule and maintain service engineer visits.

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Scheduling a Visit **21**

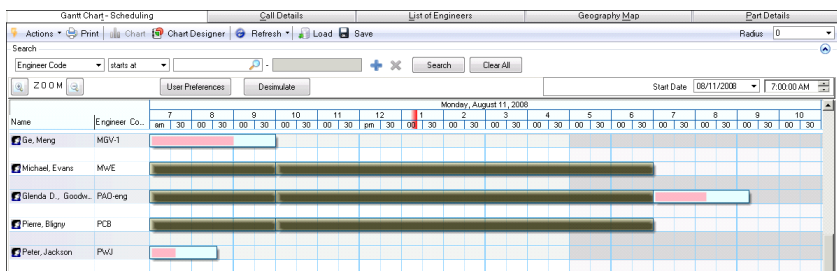
Right-Click Menu **26**

Defining Gantt Chart User Preferences **27**

Gantt Chart - Scheduling Tab

The Gantt Chart - Scheduling tab displays information for existing schedules for visits by engineers as well as details about engineer working times. This tab also lets dispatchers, service managers, and so on schedule new visits as per service calls. For details about visit scheduling, see the section “Scheduling a Visit” on page 21.

Fig. 3.1
Gantt Chart -
Scheduling Tab

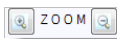


A visit links a service engineer to a service call line through a schedule. Visits are scheduled at the call line level. Once a service call line is scheduled, its status is updated to reflect this. A single call line may have one or more scheduled visits.

Use the filter on the Gantt Chart - Scheduling tab to display only those engineers that match your criteria. You can filter call line records to show skills required for the visit (All Skills Matched or Some Skills Matched), parts required (All Parts Matched, Some Parts Matched), and so on.

You can decrease or increase the period of time period displayed on the Gantt chart by using the Zoom in (+) or Zoom out (-) buttons respectively.

Fig. 3.2
Zoom Buttons



You also can right-click the time bar and select a different time interval setting for the time line.

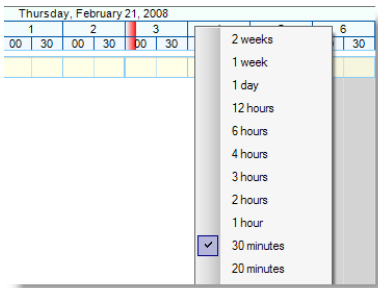


Fig. 3.3
Time Interval
Setting

Times on the Gantt chart display in the user’s time zone—that is, the time zone on the local client PC—regardless of the Multiple Time Zones setting in SSM.

Note Schedules are displayed on the Gantt chart for seven days starting from the start date when the browse is refreshed. To display schedules in the future or in the past, reset the start date and refresh the Gantt chart browse.

The Gantt Chart - Scheduling tab consists of a standard browse with additional scheduling-related features.

Radius. Select a radius from the drop-down listbox to display scheduled engineer visits that are within the selected radius. The radius distance is measured from the geographical position of the engineer to the end user location.

Simulate. Click to view the relative time period available for each field engineer to attend to the selected service call line.

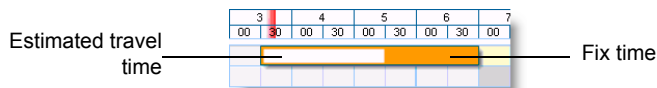
Use Simulate in conjunction with the SLA for Call bar that displays when a call is selected in the All Calls browse. By comparing the SLA for Call bar and simulated bars for your engineers, you can determine which engineers can arrive at the customer location to start work at the specified response time.

You can modify the start date and time for the simulation bars by setting the start date and time on the Gantt chart. By default the simulation bars use the client current system time.

Start Date. Select a date from the calendar to jump to that date in the browse.

Start Time. Select a date from the calendar to jump to that date in the browse.

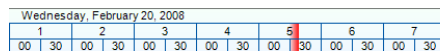
SLA for Call. Displays the response time for the call line selected in the All Calls browse, as defined in the SLA. The SLA for Call bar begins at the time the call was opened. The white portion of the SLA for Call bar indicates the required response time for the engineer to arrive at the end user. The orange portion indicates the time required to provide the service specified in the call line—installation, preventive maintenance, and so on.



When scheduling a visit, you can compare the SLA for Call bar against the simulation bars for your engineers to help determine which engineers can respond within a suitable time frame to satisfy your contractual obligations with the customer.

The current time of client system is indicated on the Gantt chart by the vertical red line under the date.

Fig. 3.4
Current Time Line



Information for each engineer displays on the Gantt chart as two lines of the same color. The next engineer has lines of a different color so that each engineer is easily differentiated on screen. The line containing the code for the engineer shows scheduled visits, non-working schedules, and absences. Scheduled visits typically are a different color for various work codes. Non-working schedules and absences display in the color specified using the User Preference dialog box.

Note See the section “Defining Gantt Chart User Preferences” on page 27 for details on defining Gantt chart preferences.

There are two types of non-working time: holiday time, which is scheduled by using Area Holiday Maintenance (11.15.9); and break time, such as lunch and weekends. Break time is scheduled by using Engineer Master Schedule Maint (11.13.15.1) or Engineer Detail Schedule Maint (11.13.15.4).

Non-working time is different from absence time. Absence time might include medical appointments or emergencies, and is always associated with a reason code. On the Gantt chart, non-working time does not include absence time.

Engineer non-working schedules can be disabled in the Gantt chart view by using the User Preference dialog box. Disabling non-working schedules improves the performance of the Gantt chart refresh.

Non-working schedules and break times are not considered as available work time when call line schedules are simulated. During scheduling, the system displays a warning if a dispatcher attempts to schedule a service visit during a non-working or absent period.

Scheduling a Visit

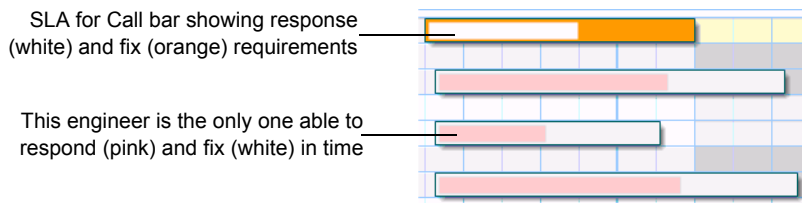
Scheduling a visit using the Gantt chart entails defining a time for a service engineer to provide the type of service defined by the call line work code as per the service call. Once a call is scheduled, the status of the call line is updated automatically to the scheduled status provided in SSM Control.

Typically scheduling a visit involves a dispatcher asking the following types of questions; suggestions are provided for each question. The way in which you schedule visits is flexible, and the following are only suggestions.

- 1** In the All Calls browse, which call lines need a visit to be scheduled first?
 - a** Using the Call View in the All Calls Browse, sort the Response Date and Response Time columns to determine the call lines that require the most urgent action.
 - b** After identifying the call line requiring the most urgent action (visit), select the call line. Use the SLA for Call bar to view the required response time as defined in the service contract for this customer.

- 2 Which engineers would be able to reach the customer location and provide service in an appropriate amount of time?
 - a Click the Simulate button to display the estimated travel time and fix time for each engineer. Compare the simulate bar for your engineers with the SLA for Call bar to determine which engineers would reach the customer location in time to complete the work within the required response time.

Fig. 3.5
Comparison of
Response and Fix
Times



Note You also can use the Engineer View to see which engineers are within a certain radius of the customer location.

- 3 Alternatively, you could ask: which engineers possess the appropriate skills and spare parts to service the customer most effectively?
 - a Click the Call Details tab and then click the Call Information tab. Use the Required Skills grid to see which skills are required for the visit. You can use the Item Details grid to see the spare parts that are required for the visit.
 - b Click the List of Engineers Tab to view the engineers and their skills. Review the Spare Parts Details grid to see the spare parts an engineer has in their trunk stock.

Note As an alternative to the previous step, you could use the filter on the Gantt chart to only display those engineers who have the skills required. Use the All Skills Matched, Some Skills Matched, All Parts Matched, or Some Parts Matched criteria.

Through this process you can narrow the list of potential engineers. Then schedule the visit:

- 1 Drag the call line onto the row of the selected engineer on the Gantt chart. Drop the call line into the time block for the start of the response time.
- 2 The Update Visit Details box displays. Enter the scheduling information. For details, see the section “Update Visit Details Box”.
- 3 If required, plot the customer, engineer, and/or spare parts locations. For details, see the section “Plotting Items on Maps” on page 40.
- 4 Review other information as required contained in the Contract Details and Associated Calls screens.

Update Visit Details Box

Use the Update Visit Details box to view and maintain scheduling information for the engineer visit to the customer site. This box displays when you drag a service call line onto the row of a selected engineer on the scheduling Gantt chart.

Update Visit Details for Call ID CA100266 / 1

Basic Details

Call ID	CA100266	Call Description	
Item Number	JN0001-1	Serial Number	2000
Call Line	1	End User	EU0001A
Starting Address		End User Name	Medical Supply Company
9510 Barkerville Ave		Address	1015 SOUTH MAIN STREET
Whittier,		ORLANDO, 32821	

SLA Details (Dispatcher's Time Zone)

Service Type	Service				
Call Date	7/9/2008	Response Date	7/9/2008	Fix Date	7/9/2008
Call Time	10:00:00 AM	Response Time	11:00:00 AM	Fix Time	11:00:00 AM

Visit Details (Dispatcher's Time Zone)

Engineer Code	Isse1	Visit Status	Open
Start Date	08/04/2008	Visit Date	08/05/2008
Start Time	10:00:30 AM	Visit Time	11:06:30 PM
Travel Distance	2498.83 M	Travel Duration	37:06
		Visit Duration	1:00

>> OK Cancel

Fig. 3.6
Update Visit
Details Box

The Basic Details and SLA Details areas display information for the service call stored in SSM; this information is read-only. The SLA Details area shows information that relates to the level of service defined for the end user. All time information in the window uses the dispatcher's time zone.

Most fields in the Visit Details area can be updated.

Engineer Code. Displays the engineer scheduled for the visit. This field is read-only. Engineers can be assigned to a call only via the Gantt chart.

Visit Status. Displays the status of the service call visit. Indicate a new status, Open or Close, if required.

When a visit is open, the start time, visit time, and fix time are assumed to be estimated. When a call is closed, QAD FSS assumes these times are actual.

Note All date and time information for a call can be modified in SSM even when the call is closed.

Start Date. Displays the date on which the service call begins; that is, the date on which an engineer will leave in order to start work on this service call. Enter a new date if required. Updating this value may update the visit date/time and fix date/time values.

Start Time. Displays the time at which the service call begins; that is, the time at which an engineer will leave in order to start work on this service call. Enter a new time if required. Updating this value may update the visit date/time and fix date/time values.

Visit Date. Displays the date on which the engineer is expected to arrive at the customer site to begin work. Updating this value may update the start date/time and fix date/time values.

Visit Time. Displays the time at which the engineer is expected to arrive at the customer site to begin work. (This is also called next activity time or scheduled time.) Updating this value may update the start date/time and fix date/time values.

Fix Date. Displays the date on which the engineer is scheduled to finish work on the service call. Updating this value may update the start date/time and visit date/time values.

Fix Time. Displays the time at which the engineer is scheduled to finish work on the service call. (This is also called the close time.) Updating this value may update the start date/time and visit date/time values.

Note Modifying the fix date/time for closed calls causes the visit duration to be recalculated.

Travel Distance. Displays the distance between the engineer's home address and the location of the end user (read-only).

Travel Duration. Displays the time estimated for the engineer to travel from their previous location to the site of the service call. Enter a new travel duration if required. If you modify this value, the system updates the visit date/time and the fix date/time.

Note If the previous task for the selected engineer is a service call, the system uses the location (address) of the customer site as the starting point when calculating the travel duration. If the previous task was an absence, the system uses the address associated with the absence as the starting point. If there is no associated address, the engineer's home address is used as the starting point; this also occurs if the previous task for the engineer was a non-working period.

Visit Duration. Displays the duration of the visit as defined by the SLA for the service call. Enter a new time if required. If you modify this value, the system updates the fix date/time.

After confirming the schedule details are correct, click OK. Call details are updated when the Update Visit Details box closes. The visit bar displays for the selected engineer. The system back-schedules the travel time for the engineer so that the engineer arrives at the required time as specified in the Update Visit Details box. The visit bar displays the name of the end user (customer).

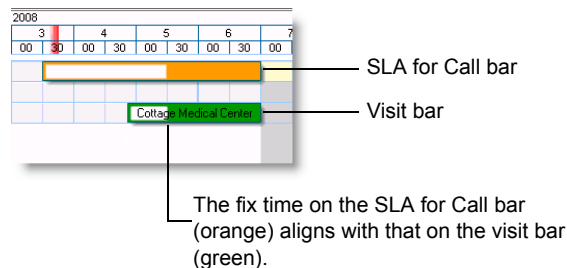


Fig. 3.7
Fix Times on SLA
for Call Bar and
Visit Bar

When you schedule a service call, the system takes into account any non-working schedules that have been created, including any absences defined in Engineer Absence Maintenance (11.13.15.17). The system displays a warning if an attempt is made to schedule a service call during a non-working period. The warning can be overridden if necessary.

Right-Click Menu

Right-click a scheduled visit in the Gantt Chart - Scheduling grid to display a right-click menu that lets you perform scheduling-related tasks.

For a complete listing of right-click menus and commands available in QAD FSS, see “Right-Click Menus and Commands” on page 7.

Plot on Map

Choose the item you want to plot:

- Selected Visit Location
- Engineer Home Address
- All Engineer’s Home Addresses
- Show Engineer’s Route on Map
- Plot Driving Direction for an Engineer

View Tabs

Choose the command for the tab you want to view.

Delete Visit

Delete the selected visit.

Engineer Visits for a Day

Opens a box that displays all visits for the engineer scheduled for that day. When a record is selected in this tab, the corresponding visit is highlighted in the Gantt Chart - Scheduling tab is highlighted.

Modify Visit Details

Displays the Update Visit Details box.

Defining Gantt Chart User Preferences

Use the User Preference dialog box to configure display preferences for the scheduling Gantt chart. The dialog box has three tabs: General, Colors, and Tool Tips.

To display the User Preference dialog box, click the User Preference button to the right of the Zoom buttons.

General

Use the General tab to configure settings for the Geography Map tab and the scheduling Gantt chart. If mapping software is not used, the Geography Map tab does not appear in QAD FSS.

Note You must restart your FSS session for any changes you have made to settings on the General tab to take effect.

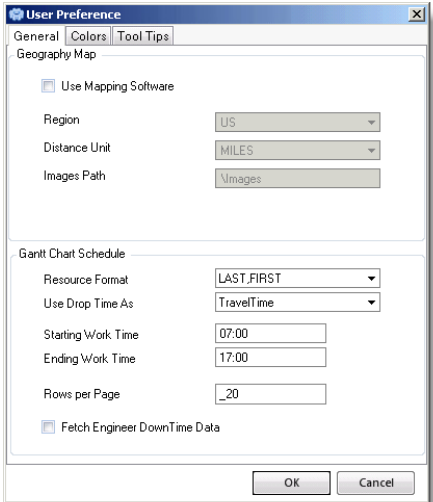


Fig. 3.8
User Preference -
General Tab

Geography Map

Use Mapping Software. Select the check box to indicate that Microsoft MapPoint is installed. The first time you start QAD FSS, the system assumes that mapping software is installed.

Region. Specify the region (US or Europe) in which you are using QAD FSS.

Distance Unit. Specify the distance unit to use.

Images Path. Enter the path to your `images` folder. The images folder contains the icons used as map legends.

Gantt Chart Schedule

Resource Format. Specify the format to use for engineer resource names (Last/First or First/Last).

Use Drop Time As. Indicate whether to use travel time or visit time as the drop time. Drop time indicates where the service call line that you want to schedule will fall when dragged from the All Calls browse onto the scheduling Gantt chart.

Starting Work Time. Indicate the starting work time for engineers for the scheduling Gantt chart.

Ending Work Time. Indicate the ending work time for engineers.

Rows per Page. Enter a value to specify the maximum number of engineers that can be displayed on the Gantt chart at a time.

Fetch Engineer Downtime Data. Select the check box to display non-working schedules for engineers.

Note If you do not need to display non-working schedules, it is recommended that you clear this check box to allow the Gantt chart to refresh more quickly.

Colors

Use the Colors tab to configure color settings for the scheduling Gantt chart.

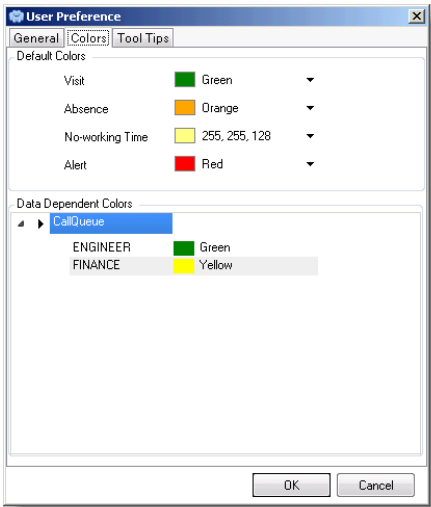


Fig. 3.9
User Preference -
Colors Tab

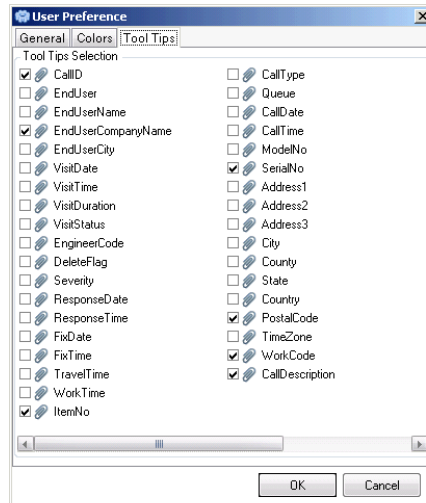
In the Default Colors area, specify the color to use for scheduled visits, absence times, scheduled non-working time, and visits with alerts. You can assign the same color to all types of time if you want.

In the Data Dependent Colors area, specify the color to use for visits based on data from the calls or call lines (for example, call status, call queue, call line work code, and so on).

Tool Tips

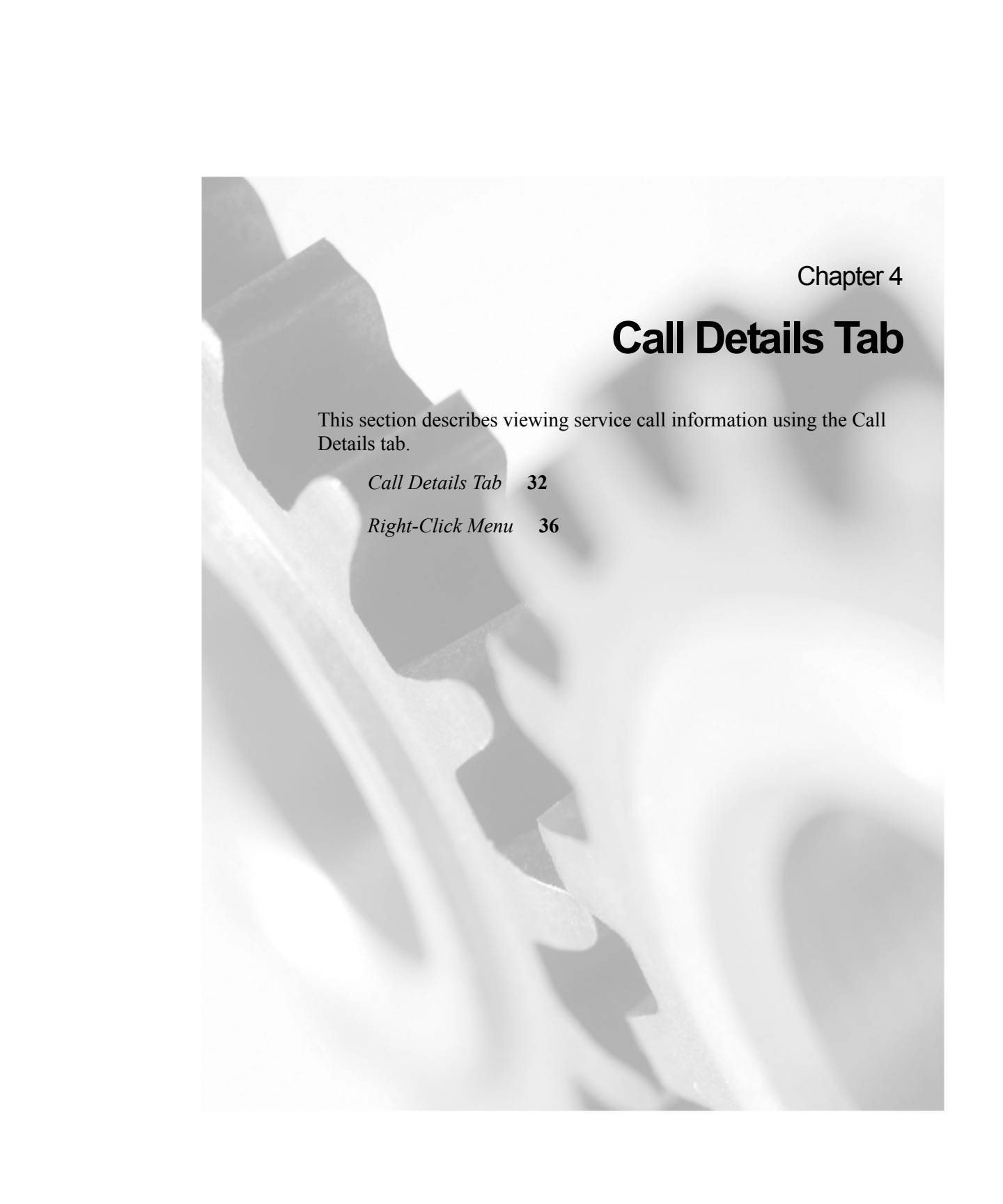
Use the Tool Tips tab to configure Tool Tip settings for the scheduling Gantt chart.

Fig. 3.10
User Preference -
Tool Tips Tab



Use the check boxes to define the fields that will display as a single Tool Tip when the mouse cursor is on a scheduled visit bar on the scheduling Gantt chart.

You also can configure the icons used on the Geography Map tab; for details see “Configuring Map Legends” on page 42.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are positioned in a way that they appear to be meshing together. The lighting creates highlights and shadows on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

Chapter 4

Call Details Tab

This section describes viewing service call information using the Call Details tab.

Call Details Tab **32**

Right-Click Menu **36**

Call Details Tab

The Call Details tab displays the details of the service call line selected in the All Calls browse. Call details are stored in the repository in SSM. If Multiple Time Zones are enabled in SSM, most times in the Call Details tab display using the time zone setting for the dispatcher's user ID from QAD ERP. Those times that display in another time zone are indicated by the time zone displayed on the screen for that particular tab.

Fig. 4.1
Call Details Tab

The screenshot shows the 'Call Details' tab selected in the 'Garitt Chart - Scheduling' window. The interface includes a left-hand sidebar with tabs: 'Call Info', 'Contract Details', 'Installed Base', 'Item Details', 'End User Details', and 'Associated Calls'. The main content area is divided into several sections:

- Basic Details:** A grid containing fields for Call ID, Call Line, Call Date, Time Opened, Call Status, Contact Name, Engineer, Response Date, Call Line Status, Telephone, Service Type, Fix Date, Fix Time, and Queue.
- Problem Description:** A text area for describing the issue.
- End User:** A text area for identifying the user.
- Call Comments:** A large text area for additional notes.
- Visit Details:** A section for listing scheduled visits.
- Required Skills:** A list of skills needed for the call.
- Reminder:** A text area for setting reminders.

 At the bottom right, there are 'Save' and 'Cancel' buttons.

Click the tabs on the left-hand side of the tab to display the following:

- Call Information
- Contract Details
- Installed Base
- Item Details
- End User Details
- Associated Calls

Call Information

The Call Information tab displays details of the call line selected in the All Calls browse; this tab displays by default when the Call Details tab opens. The Visit Details grid shows all visits scheduled for the service call line, including status and assigned engineer.

You can use the Calls Information tab to edit details for a service call, if required.

The call line status, call header status, queue, comments and skills for the service call can be modified here. Any modifications to call information are committed to the QAD repository when you click Save.

You also can add, modify or delete reminders for the service call by right-clicking the Reminder grid. For details see “Reminders” on page 15.

Contract Details

The Contract Details tab displays the details of all contracts for the call line selected in the All Calls browse. It also displays customer address, bill-to address, and customer operating hours in the end user’s time zone. The fields on this tab are read-only.

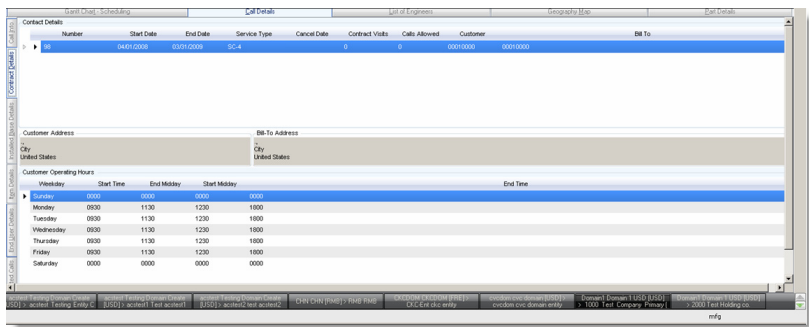


Fig. 4.2
Call Details -
Contract Details
Tab

You can drill down into contract lines and service coverage times by clicking the arrow on the left. Service coverage times display in the end user’s time zone.

Installed Base

The Installed Base tab displays service call details, bill-to name and address, customer name and owner name, and installed base details for the call line selected in the All Calls browse. The fields on this tab are read-only.

Fig. 4.3
Call Details -
Installed Base Tab

The screenshot shows the 'Call Details' window with the 'Installed Base' tab selected. The window is divided into several sections: 'Basic Details', 'Call Details', 'List of Engines', 'Geography Map', and 'End Details'. The 'Basic Details' section contains fields for Call ID (csc0001), End User (0001), Contract, Phone, Call Status (Assigned), Call Line Status (Schedule), Queue (Engineer), Site (12000), Engineer (tose3), Work Code (Tech), Caller (Hong Yuan), PO Number, Priority (0), and Reference (0). The 'Call Details' section shows Bill To Name (10000), Address (10000), Customer Name (00010000), and Ownership. The 'List of Engines' section displays a table of installed base details.

Item Number	Serial	Reference	Description	Model	Initial Date	Warranty Code	Warranty Expiration	Item Level	Ownership	Location	Parent
PC0100	P01001001	0	Processed Good 1		01/01/2008	1000	06/01/2008				

Item Details

The Item Details tab displays the spare part details and material order details of the call line selected in the All Calls browse. Data for spare part details come from Parts List Maintenance (11.1.10) in SSM. The fields on this tab are read-only.

Fig. 4.4
Call Details - Item
Details Tab

The screenshot shows the 'Call Details' window with the 'Item Details' tab selected. The window displays 'Spare Parts Details' and 'Material Order Line Items'. The 'Spare Parts Details' section shows a table of spare parts.

Item Number	Description	Quantity	Material Order	BCM Code	Consumed
1011a	Component gsw	1	SEC02	000	☒
1.0B	Red Base Bag	1	YES		☐
401-wad		10	SEC05		☐

The 'Material Order Line Items' section shows a table of material order line items.

Material Order	Call	Engineer	Order Date	Required Date	Required Time	Due Date	Remarks	Charge Code	Confirmed	Ship Date	Purchase Order	Ship-To	Site
SEC02	202	ALH001	02/06/2008	02/06/2008		02/06/2008			☐			202	

End User Details

The End User Details tab displays the name, message, address, end user contacts, and operating hours of the call selected in the All Calls browse. The fields on this tab are read-only.

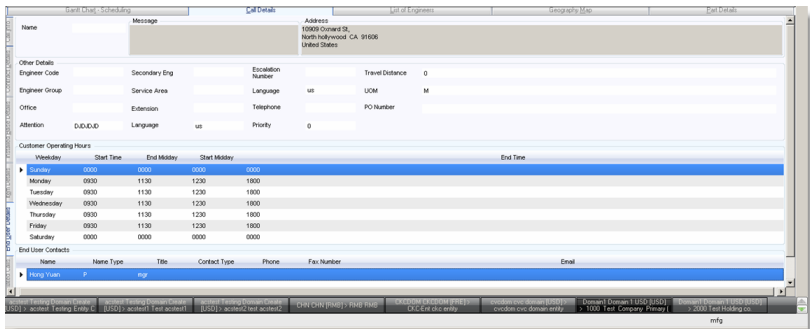


Fig. 4.5
Call Details - End
User Details Tab

Associated Calls

The Associated Calls tab displays the problem description, comments, associated calls, and associated call visit history of the call line selected in the All Calls browse. The fields on this tab are read-only.

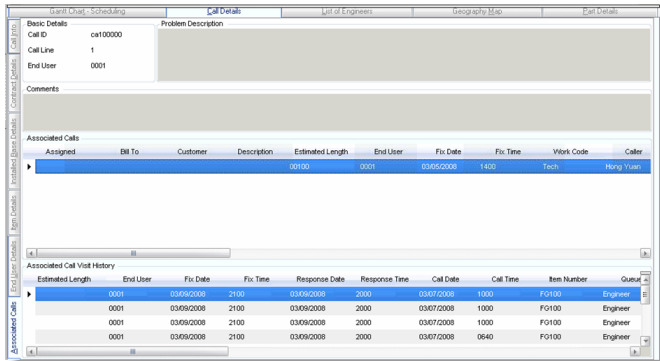


Fig. 4.6
Call Details -
Associated Calls
Tab

The Associated Calls grid shows all open service calls that have the same end user as the selected service call. An open service call has a status that is not closed, cancelled or on hold.

You can double-click a call to open a new Call Details tab displaying the details of the selected call.

The Associated Call Visit History grid displays a history of all visits and service calls for the end user and the item being serviced on the call line.

Right-Click Menu

Right-click the Reminders grid on the Call Details grid to display a right-click menu that lets you add reminders to a service call. For details see “Reminders” on page 15.

For a complete listing of right-click menus and commands available in QAD FSS, see “Right-Click Menus and Commands” on page 7.

List of Engineers Tab

This section describes viewing engineer information using the List of Engineers tab.

List of Engineers Tab **38**

List of Engineers Tab

Use the List of Engineers tab to view details for engineers such as skills, spare parts in an engineer's trunk stock, and the engineer's current schedule shown in the engineer's time zone. You can also use this tab to search for a specific engineer that has, for example, the skills required for a visit.

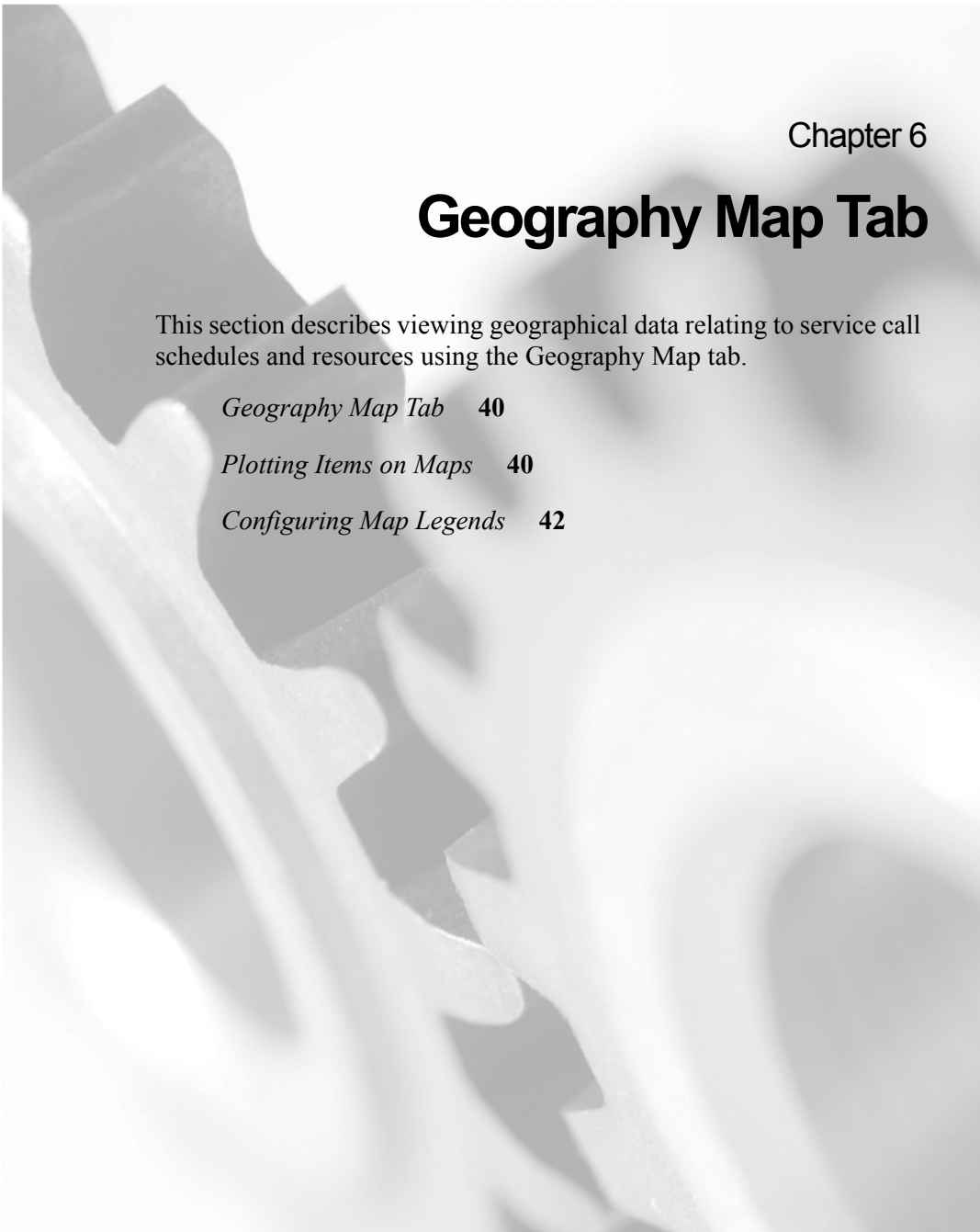
Use search conditions to filter records in the engineer browse to determine which engineer to schedule for a service call. For details, refer to *User Guide: User Interfaces*.

Fig. 5.1
List of Engineers
Tab

Engineer	Name	Site	Location	Service Area	Status	Group	Schedule	Calls per Day	Engineer Code
FSE	Jane Smith	FL1000	100	North	avail	standard		0	FSE
FSE-1	Jane Smith	JN1000-1	LCM01-1	North	avail			0	FSE-1
fse1	Jane			Westcot	avail	STANDARD		0	fse1
FST-1	Bob Jones	JN2000-1	LCM02-1		avail			0	FST-1
JNQ-1	Jingmei Guan	JN1000-1	LCM01-1		avail			0	JNQ-1
MF501	First Last	FL2000	MF501	Americas	avail			0	MF501
MF502	Sue Bock	FL2000	MF502	Americas	avail			0	MF502
MGV-1	Meng Ge	JN1000-1	LCM01-1		avail			0	MGV-1

The List of Engineers tab shows information such as the skill code, description, level, and certification date. Additional grids display associated skill, inventory, and schedule information for the selected engineer:

- Skill Details grid displays skill, level, certification date, area and type.
- Spare Parts Details grid displays item, description, quantity on hand, and units of measure.
- Engineer Schedule grid displays start date, weekday, start time, midday end time, midday start time, and end time.



Chapter 6

Geography Map Tab

This section describes viewing geographical data relating to service call schedules and resources using the Geography Map tab.

Geography Map Tab **40**

Plotting Items on Maps **40**

Configuring Map Legends **42**

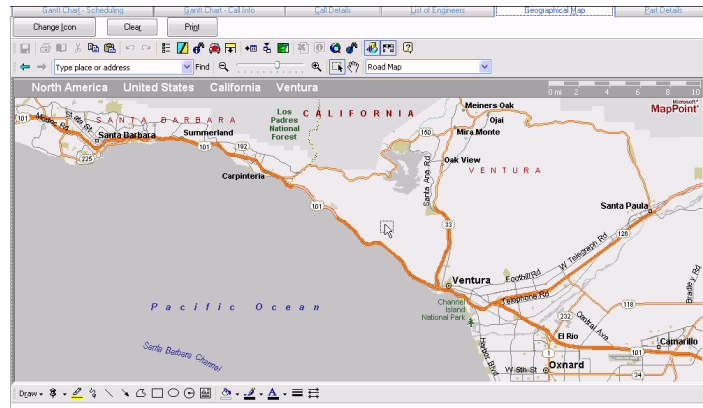
Geography Map Tab

Use the Geography Map tab to view the location of service calls, engineers, and inventory. You also can plot an engineer's route and determine the estimated travel time for the engineer to reach the service call location by using the right-click menu; see "Plotting Items on Maps" for details.

Geographical information about end users and service calls is recorded in SSM. This information is available in QAD FSS and can be plotted on a geographical map.

Note Map-plotting features are available only if the Microsoft MapPoint software is installed. The Geography Map tab displays only if mapping software is installed and configured for use. For details about using the MapPoint interface, refer to the Microsoft Map Point user documentation.

Fig. 6.1
Geography Map
Tab



Plotting Items on Maps

Once a service call has been scheduled in QAD FSS, you can use the various right-click menus in QAD FSS to plot different types of information on the map. For easy reference, the table below displays all the available plot-related commands that are available in QAD FSS.

Note For a complete listing of right-click menus and commands available in QAD FSS, see "Right-Click Menus and Commands" on page 7.

Table 6.1
Plot Commands

To plot...	Choose this Command
All service calls	On All Calls browse, choose Plot Calls on Map All Calls.
Selected service call	On All Calls browse, choose Plot Calls on Map Selected Call.
Scheduled visit location	On Gantt Chart - Scheduling, choose Plot on Map Selected Visit Location.
Home address of selected engineer	On Gantt Chart - Scheduling, choose Plot on Map Engineer Home Address.
Home address of all engineers	On Gantt Chart - Scheduling, choose Plot on Map All Engineer's Home Addresses.
Engineer's route for a given day	On Gantt Chart - Scheduling, choose Plot on Map Show Engineer's Route on Map. On Part Details, choose Show Engineer's Route on Map.
Route of selected engineer to service call	On Gantt Chart - Scheduling, choose Plot on Map Plot Driving Direction for an Engineer.
Inventory location	On Part Details, choose Show Inventory Location on Map.

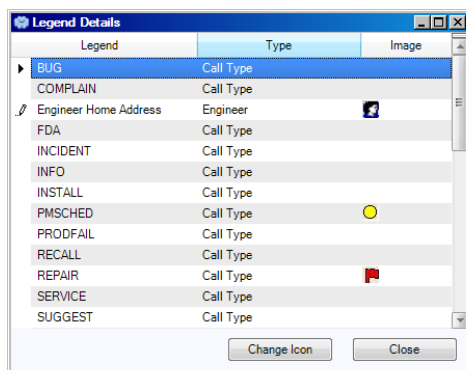
Multiple items can be plotted on the map at the same time. To clear plotted items, click the Clear button at the top of the Geography Map tab. To print a map, click the Print button.

Configuring Map Legends

Use the Legend Details box to configure the map legends (icons) that are used to represent items you plot on maps, such as service call types and warehouse locations.

- 1 Click the Change Icon button located at the top-left corner of the Geography Map tab. The Legend Details dialog box displays showing the icons currently in use as map legends.

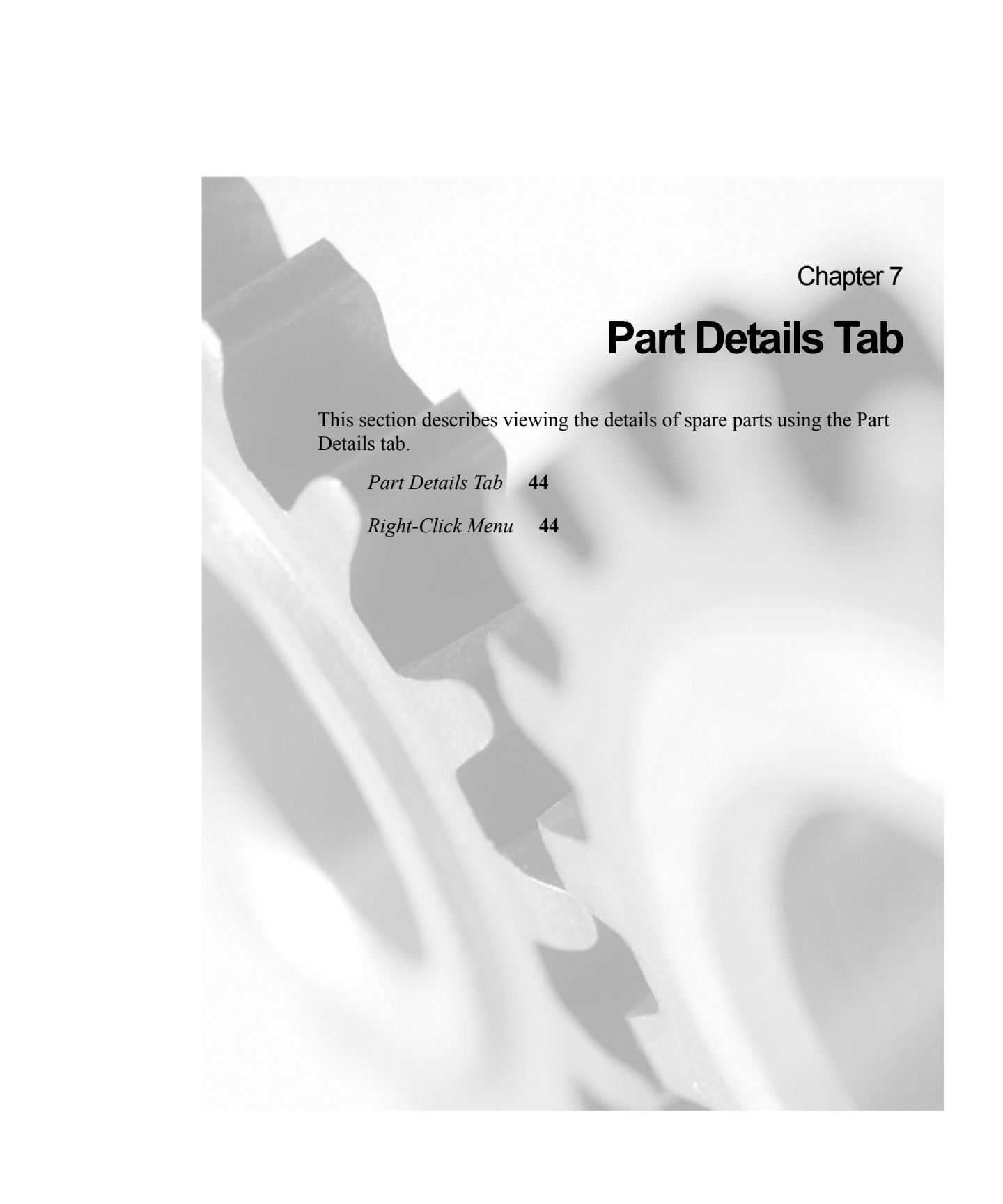
Fig. 6.2
Legend Details



- 2 Select the icon you want to change and click Change Icon. The Open dialog box displays.
- 3 Navigate to the folder containing the icon you want to use and select the icon. Click OK.

Default icons are supplied in `qad.plugin.fss/images` during .NET UI installation.

After changing your map legends you may have to refresh the map display in order for the new icons to display.



Chapter 7

Part Details Tab

This section describes viewing the details of spare parts using the Part Details tab.

Part Details Tab **44**

Right-Click Menu **44**

Part Details Tab

Use the Part Details tab to view inventory details of spare parts associated with a service call, as well as the part availability for an engineer or warehouse location. All fields on this tab are read-only.

Fig. 7.1
Part Details Tab

Item Number	Description	Unit of Measure	Site	Location	Quantity On Hand	Quantity	Engineer	Reference	Lot/Serial	Address Line 1	Address Line 2	Address Line 3
001a	Component part 001a	EA	10000		-277.0	1.0	ALH001			Distribution Division	One World Vllay	
001a	Component part 001a	EA	10000	100cc	0.0	1.0				Distribution Division	One World Vllay	
001a	Component part 001a	EA	10000	600	25.0	1.0				Distribution Division	One World Vllay	
001a	Component part 001a	EA	10000	Consign	0.0	1.0				Distribution Division	One World Vllay	
001a	Component part 001a	EA	10000	resloc	-1.0	1.0				Distribution Division	One World Vllay	
001a	Component part 001a	EA	10000	sto	-1.0	1.0				Distribution Division	One World Vllay	
001a	Component part 001a	EA	12000	100	-53.0	1.0	ENVJ			23 Ventura Blvd.		

The Part Details tab consists of two grids:

- Inventory Details grid, which displays information for the available inventory for a service call.
- Material Order Details grid, which displays the material order line items for a service call. New material orders can be created in Material Order Maintenance (11.11.1).

Right-Click Menu

Right-click an inventory record on the Inventory Details grid to display a right-click menu that lets you plot an engineer's route and inventory location.

For a complete listing of right-click menus and commands available in QAD FSS, see "Right-Click Menus and Commands" on page 7.

Show Engineer's Route on Map

Display an engineer's route map from point to point. Driving directions are not considered.

Show Inventory Location on Map

Display the location of the inventory on the map.

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