ETAdirect

SmartCollaboration
Part Number E62343-01

Contents

About this Document

This document describes the general principles on which the ETAdirect system is based. It is intended for the personnel who work with ETAdirect.

⚠ **Important:** This document explains how to accomplish tasks in the Sunrise demo instance of ETAdirect. If your instance of ETAdirect is configured differently or if you have customized your instance, your screens, labels, and processes may differ from those described in this guide.

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Getting Started with ETAdirect

ETAdirect can help you complete your day-to-day tasks faster and more accurately than traditional or manual workforce management tools. In particular, you can use ETAdirect to accomplish the following goals:

- **Understand what is happening in the field right now.** Use the Time View to see at a glance where resources are working and what they are working on. You can easily see who is at a job site and who is traveling as well as the status of their activities.
- **Reduce calls to and from the field looking for a resource to take a new job.** At a glance, you can tell whether the resource has time available for additional work.
- **Place new work on a route quickly and easily.** If the resource does have time, you can move work to the route.
- **Respond to jeopardy situations immediately.** When an actity is a risk, you can move it to avoid the service window being missed.

Chapter

1

Using SmartCollaboration

SmartCollaboration is part of ETAdirect, a mobile workforce management application. SmartCollaboration provides a tool for communication between ETAdirect users and also a tool that helps organize helpdesk work. SmartCollaboration also gives you access to other data from the ETAdirect system so that you can perform many of the tasks that you normally accomplish in the Manage interface directly in the chat window. For example, you can share details about a resource, activity, or inventory item or you can move activities and inventory.

In your day-to-day work, SmartCollaboration can help you perform the following tasks:

- **Communicate with another ETAdirect user.**
- **Share details about a resource, activity, or inventory item with another user.**
- **Move an activity or inventory item.**
- **Find nearby resources.**

Setting up SmartCollaboration

Before you can use SmartLocation, you must enable several settings and permissions:

1. The activity type settings or inventory type settings must permit the sharing of details.
2. **Grant permissions:** Navigate to Company Settings > Permissions and grant permission to the appropriate profiles for each of the following items:

- SmartCollaboration
- Move Inventory via Chat
- Move

- **Activate SmartLocation:** See the SmartLocation User Guide for details. For each resource that uses SmartCollaboration, create a one-to-one association between the user and the resource. Log out and then log back in to activate the changes.

    Optional: Alerts are for typically information only. As a result, actions like moving an activity are not blocked by an alert. If you want to change the way that alerts influence actions see SmartManage User Guide for details.

Troubleshooting your Configuration

These common problems can be easily corrected with a change to your configuration settings. Check the suggested solution or contact TOA support for more help.

- **The Start Conversation link does not display in the Hints box:** The Start Conversation action must be added to the Hint context. You may need to define the association between the resource and the hint.
- **Details about the moved or shared item do not appear in the chat window:**Just click the EXPAND button in the upper right corner of the message. That will give you the space you need to view the details.

    The fields in Manage view that contain this information could also be empty. Contact TOA support to help you define the details in the **Resource details in chat**, **Activity details in chat**, or **Inventory details in chat** context.
- **The activity icon does not have a name next to it in the chat window:** The **identify activity context** has not yet been defined.
- **The inventory icon does not have a name next to it in the chat window Identify equipment by context:** has not yet been defined.
- **Cannot move inventory items:** SmartLocation has not yet been activated. See the SmartLocation User Guide for instructions.

Technical Functionality

SmartCollaboration contains two main components:

- **Community:** This application provides a simple interface for team members to use for communicating about activities and equipment. Through this interface, users can chat, share details stored in ETAdirect and move activities and inventory. Mobile users can also find nearby resources.
- **Helpdesk:** This application routes helpdesk requests to agents. It provides resources with a simple interface for reaching and communicating with helpdesk agents. Agents can also transfer a conversation to another agent.

Both applications rely on the ETAdirect application for information about resources, activities, and inventory. Working with inventory and finding nearby resources also requires SmartLocation, another module of the ETAdirect system.

🌀 **Note:** SmartCollaboration does not work on the mobile interface when the device is offline.

Finding a Chat User

You can search for a user by name. Perform the following steps:

1. Click the **Community** button to reach another ETAdirect user.
2. Click the **Helpdesk** button to reach a helpdesk agent.
3. Click the Settings button . Select **Search Contact**. The **Search Contact** window displays.
4. In the **Search Contact** window, type the user's name or part of the user's name. The results are displayed.

5. Click the name of the contact to start the chat.

> 🌀 **Note:** You can add this user to your address book so that you won't have to search for it next time. See **Adding a User to Your Address Book** for details.

Adding a User to Your Address Book

You can add users to your address book so that you don't have to search for their names to start chats with them. Instead, their names are displayed in the Community and Helpdesk windows.

> ℹ️ **Tip:** An open circle icon next to the name means that the user is not in your address book. A closed circle icon next to the name means that the user is in your address book.

Perform the following steps:

1. Open a chat with the user, but do not send any text.
2. In the chat window, click on the user's name.
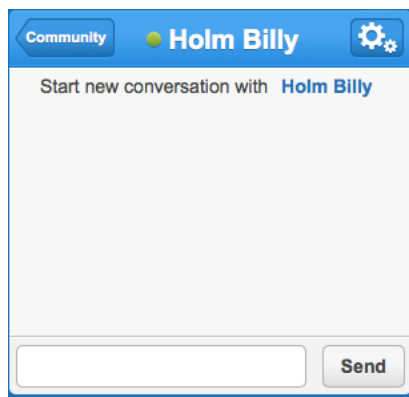
3. Click **Add to Address Book**.
4. Click **Conversation** in the upper left corner to return to the chat window.

Removing a User from Your Address Book

You can add users to your address book so that you don't have to search for their names to start chats with them. Instead, their names are displayed in the Community and Helpdesk windows.

> ℹ️ **Tip:** An open circle icon next to the name means that the user is not in your address book. A closed circle icon next to the name means that the user is in your address book.

Perform the following steps:

1. Open a chat with the user, but do not send any text.
2. In the chat window, click on the user's name.
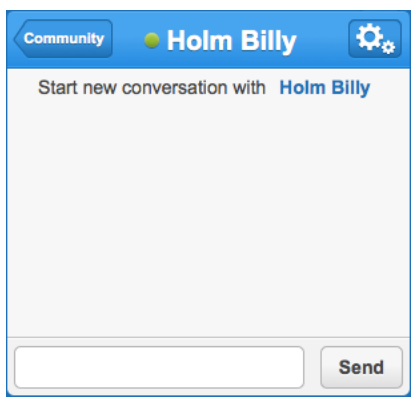
3. Click **Remove from Address Book**.
4. Click **Conversation** in the upper left corner to return to the chat window.

Starting a Chat

This section describes how to start a chat from the Communication window or the Helpdesk window in the upper right corner of the screen.

When enabled, you can also start a chat from several locations throughout the Web interface, including the Hints box. Look for links labeled **Start Conversation**.

Follow these steps to start a chat from the Communication window or the Helpdesk Window, perform the following steps:

1. Find the user or the Helpdesk that you want to chat with.
2. When you select the user or Helpdesk, the chat window displays.

   Note: A green icon next to the name means that the user is online. A gray icon next to the name means that the user is not online.

3. Type your message in the text field at the bottom of the window.
4. Click **Send**. Your message displays in the chat window. Your messages are in white balloons. Messages from other users are in blue balloons.

Starting a Conference in the Web Interface

You can use a conference to chat with more than one user at once.

Perform the following steps:

1. Start a chat with one user as usual.
2. Find the other user that you want to add to the chat.
3. Drag and drop the other user's name onto the chat window.
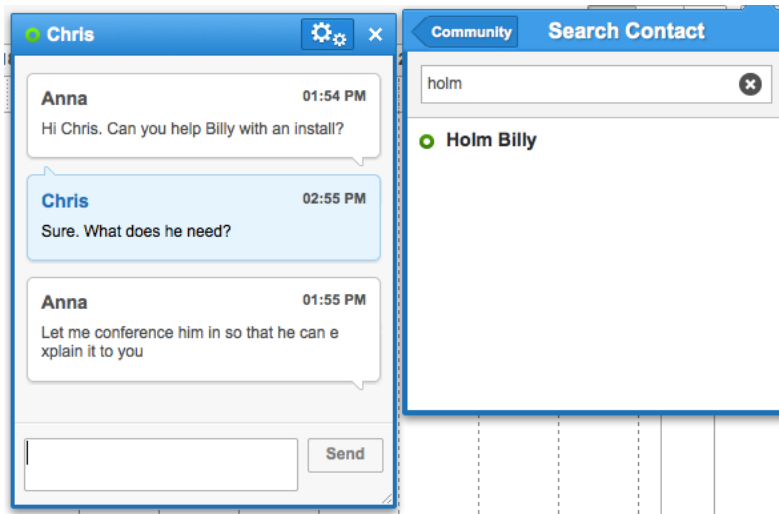
The text input field turns yellow and after you drop the name onto the window, a confirmation message appears in the chat window.
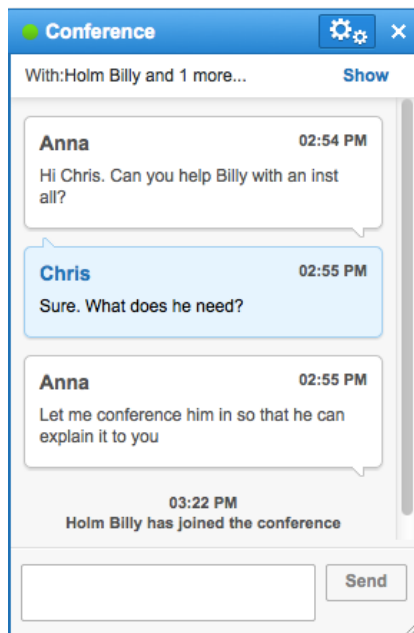
4. Repeat these steps to add additional users to the conference. All messages in the thread are available to all of the users in the conference, regardless of when they join or leave the conference.

Starting a Conference in the Mobile Interface

You can use a conference to chat with more than one user at once.

Perform the following steps:

1. Start a chat with one user as usual. See **Starting a Chat** for details.
2. Click the **Settings** button and select **Invite User** from the drop down menu.
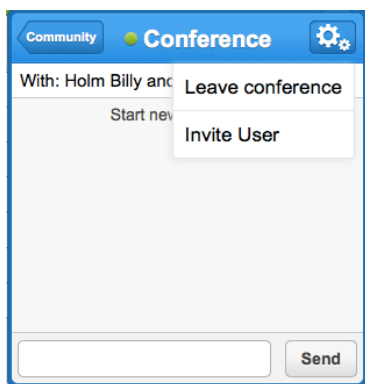
3. Search for the other user and then select his or her name from the list of results. The new user is added to the chat.
4. Repeat these steps to add more users to the conference. All messages in the thread are available to all of the users in the conference, regardless of when they join or leave the conference.

Returning to a Hidden Chat or Conference

If you close the chat window or if view the details of an activity, the chat window is hidden, but the chat or conference is still active. You can access the chat from the main window at any time. In the following example, the user has five active chats in the main window:
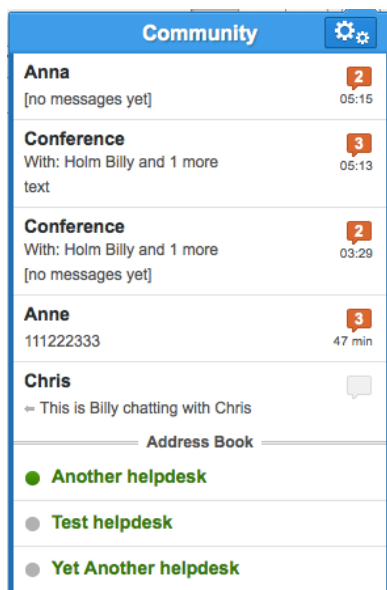
Ending a Chat or Conference

When the chat or conference is over, you can end the conversation and send the thread to the history. If you don't end the conversation, the thread is still active in the main window.

Note: A conference does not end until the last user leaves the conversation. The conversation might continue after you leave. You can access the thread in the history to view the complete conversation.

Follow these steps to end the chat or conference, perform the following steps:

1. Click the **Settings** button .
2. Select **Leave Conversation** from the drop down menu.

Retrieving a Closed Chat or Conference Thread

After a conversation is ended, SmartCollaboration saves the thread in the history.

Follow these steps to find an old thread, perform the following steps:

1. Click the **Settings** button .
2. Select **History**.
3. Search for a keyword from the thread or the name of a user who participated in the conversation.
4. Select the thread from the list of results. The thread displays in a chat window.

Sharing Details about a Resource, Activity or Inventory Item

The user who is receiving the details must not have execute permission. Contact TOA support to change permissions. Perform the following steps:

When you are chatting with another user, you can include the details that are stored in ETAdirect about a resource, activity, or inventory item.

Note: You can only share details in a one-on-one chat. You cannot share details in a conference.You can only share details from the Web interface.

1. Locate the resource, activity, or inventory item that you want to share details about.
2. Click either the **Community** button or the **Helpdesk** button in the upper right corner.
3. Drag the resource, activity, or inventory item from Time view into the text field in the chat box. The text field turns yellow and, after you drop the activity, the activity appears in the text history.
4. Click **Send Info** and then click **Send**.

Moving an Activity or an Inventory Item

When SmartCollaboration is activated, you can move activities and inventory items directly in the chat window. You can move activities and inventory items from both the Web interface and the mobile interface.

Moving an Activity or an Inventory Item in the Web Interface

In addition to the typical ways to move an activity and inventory in the Manage view, you can also move activities directly in the chat window.

Perform the following steps:

1. Locate the activity or inventory item that you want to move.
2. Open the community or Helpdesk chat box.
3. Select the user that you want to move the item to.
4. Drag the activity or inventory item into the text field in the chat box. The text field turns yellow and, after you drop the activity, the activity appears in the text history.
5. Click **Reassign** for activities or **Transfer** for inventory.
6. Click **Send**.

Moving an Activity or Inventory Item in the Mobile Interface

You must have permission to move activities or inventory to perform this task. Contact TOA support to change your permissions. SmartLocation must be activated to move inventory through SmartCollaboration.

From the mobile interface, you can move activities and inventory directly in the chat window.

1. Locate the activity or inventory item that you want to move.
2. Open the community or Helpdesk chat box.
3. Select the user that you want to move the item to.
4. Click the **Settings** button. For activities, choose **Reassign Activity**. For inventory items, select **Transfer Inventory**.
5. Click **Send**.

Accepting a Moved Activity or a Moved Inventory Item

Before moved activities and inventory items are assigned to you, you must accept them. Perform the following steps:

When someone moves an activity or inventory item to you through the chat window, you receive a message.

1. Click **Accept** to move the activity or item to your schedule.
2. Click **Reject** to cancel the move.

Cancelling a Move

You can cancel the move of an activity or inventory item any time before the new owner accepts it. If the new owner has already accepted the move, you can move it back to the original owner.

Follow these steps to cancel the move, perform the following steps:

1. In the chat window, locate the move.
2. Click **Cancel**.

Alerts

ETAdirect provides a number of alerts to help you understand the effect of a move on the rest of your workforce. When you use SmartCollaboration to move an activity or inventory item, the alerts appear directly in the chat window.

See the **SmartManage User Guide** for details about **Alerts.**

Finding a Nearby Resource

You must have SmartLocation activated in ETAdirect to find nearby resources. See the SmartLocation User Guide for details about this module.

Perform the following steps:

Click the **Community** button in the upper right corner of the screen .

When you are on location at an activity and you need help or additional equipment, you can look for a resource that is in the area that might be able to help you.

 Note: You can only find a resource that is near you in the mobile interface.

1. Click the **Settings** button .
2. In the drop down menu, click **Find Nearby**.

Accepting a Helpdesk Request

The main Helpdesk window displays a list of all of the Helpdesks. Each Helpdesk has a number next to it, representing the number of unaccepted requests.

1. Open the Helpdesk window.
2. Click the name of the Helpdesk to view the unanswered requests.
3. Select the request that you'd like to answer. The chat window opens and the message from the requestor displays.
4. Click **Take Chat**.

Transferring a Helpdesk Conversation

If another Helpdesk agent might be better suited to fulfill a Helpdesk request, you can transfer the request to that user.

Perform the following steps:

1. In the chat window, click the **Settings** button ⚙.
2. Choose **Transfer Conversation**.
3. Type a reason for transferring the request and then click **Transfer**.
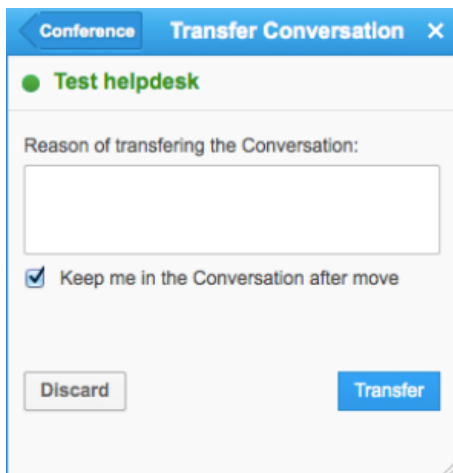
Glossary

Action Link

A link that opens a screen where you can perform an action in the ETAdirect system. Common examples include Add Activity, View Details, Delete, and Modify.

Action Management

A screen in ETAdirect where action links are managed. The information in this screen determines which links appear in which locations in the interface.

Activate Queue

A link or button that starts the resource's workday in ETAdirect. For ETAdirect to monitor delivery in real time and respond to updates, a resource must activate his or her queue, or route.

Activity

Activity is any type of things service provider does (such as: customer-related job, network maintenance, lunch break, warehouse visit, meeting, etc). Every Activity has Type, start and end time. Activity type defines specific parameters of the activity (flow, attributes, color on screen, etc)

- A **Non-scheduled Activity** is an Activity not assigned to a specific date.
- A **Not-ordered Activity** is an Activity that its order of execution in the queue is not defined at the moment, so it can be executed at any time during the working day; Not-ordered activities do not have ETA and Delivery window defined.
- An **Ordered Activity** is an Activity that its place in the queue is defined, and it has to be performed in the correspondent moment of the working day. Order of activities can be changed; Ordered activities can be set not-ordered and the other way round.

Activity Types

A label that defines the specific parameters of the activity such as which time slot this activity normally takes place in. Examples include installation, deactivation, delivery, and lunch break.

Add Time

Delay A feature in ETAdirect that allows a resource or other user to add additional time to an activity when the activity extends beyond the estimated end time.

Agent

In ETAdirect implementation methodology term "Agent" is used for any standalone application that interacts with the ETAdirect platform via ETAdirect API or ETAdirect kernel

Aggregator

An Aggregator is a high level entity on the resource (provider) tree that functions as a parent directory for other providers. An Aggregator cannot be assigned appointments.

All Day Appointment

All-day appointment is an appointment that can be done any time during the day without violating any obligations of the company. In ETAdirect terminology, All-day appointments are appointments without a Service window. Pay attention that sometimes people mix All-day appointment (without service window) and Not ordered appointment (without ETA).

All Day Activity

An activity without a service window that has been called in that day and marked **Urgent** for same day service.

Appointment

Appointment is one of of the fundamental entities of the ETAdirect system. It represents one segment of work (usually it is a synonym to work order) that is related to a specific customer. Appointment attributes include customer and an address where work takes place. If work order is not related to a specific customer, another entity that can be referred to as an Activity.

Appointment Status

Appointment status (do not confuse with Appointment type) defines a stage in the appointment flow. Possible values:

- *Pending:* appointment is planned to be executed, provider has not arrived on site yet. This is the initial status appointment has on creation. From this status appointment can be started, canceled or deleted
- *Started:* provider has arrived to the place of appointment. Only one appointment can be started in providers route at a given time. Started appointment can change status either to suspended, completed or not done.
- *Completed:* provider has successfully finished work. This is a final status and can't be changed (only Reopen appointment can be created based on this one)
- *Not done:* provider could not finish work successfully. This is a final status and can't be changed (only Reopen appointment can be created based on this one)

- *Suspended:* appointment could not be finished successfully but provider plans to return later and resume work. Appointment gets to this status using the Suspend command that creates a clone of this appointment in the same queue (as a Not ordered appointment withpending status)
- *Canceled:* customer asked to cancel the appointment or it was canceled for a different reason. This is a final status and can't be changed (only Reopen appointment can be created based on this one)
- *Deleted:* similar to canceled but such appointments are not shown in ETAdirect. They look like they have been physically erased.

Appointment Type

Appointments can be of one of the following types:

- *Regular:* typical appointment. Originally every work comes as regular appointment (? this is not clear/ Irad)
- *Prework:* appointment created by the Prework command. This command is applied to a regular appointment and creates a clone of it with the type prework to distinguish between the two. Prework appointments are created as already started (see Appointment status).
- *Reopened:* appointment created by the Reopen command applied to some completed, not done or canceled appointment (see Appointment status). This command clones the appointment creating a new Not ordered appointment with type reopen and status pending for the same provider.

The following appointment types are used for the different entities that share the same database table:

- *Activity:* this is an appointment that does not have a customer associated with it. Usually it is a break, assistance another provider or non-customer related work (network maintenance). See Activity for more details.
- *Team work:* this is specific type of activity where one provider assists another provider (is a member of the team). See Team work for details.

API

An Application Programming Interface (API) is a particular set of rules and specifications that a software program can follow to access and make use of the services and resources provided by another particular software program that implements that API. It serves as an interface between different software programs and facilitates their interaction, similar to the way the user interface facilitates interaction between humans and computers. All ETAdirect APIs are based on standard protocol – SOAP (version 1. 1). The interfaces process SOAP requests received by HTTP protocol. APIs have no limitations on the location, technology or platform used for integration (i.e.: Java, . Net, C/C++ on Windows or Unix).

Assigning

Dispatch Attaching an individual activity or a queue of activities to a resource.

Assistant

In a Teamwork activity, the resource that assists another resource. In the Resource Tree, the arrow points away from the Assistant. See **Teamwork** and **Team Leader** for more information.

Billing System

System where customer details are held, customer billing takes place, and/or activities are entered.

Booked Activities

The number of activities that are either in an ETAdirect bucket or located on a route.

Bucket

Element of the Resource tree representing place where jobs are kept before they are assigned (manually or automatically) to specific providers.

Business Rules

A number of settings in ETAdirect that align the functions of the system with the strategies and practices of your company.

Capacity Categories

A set of work skills and time slots that are bundled together to estimate the time and skills required for a particular task. This information is sent through an API to your company's appointment system so that agents can tell whether qualified resources are available before they book an appointment.

Calendar

A view of the schedule for a resource, group or bucket.

Capacity bucket

Bucket used for Quota management

Capacity category

Predefined set of work skills, work skill groups and time slots within which they are considered by the Capacity API.

Capacity Management

A process of managing a workforce to ensure that a company has enough people with the specific skills to do a certain amount of work. There is a related process, Quota management, that defines the reverse relationship.

Company Boundaries

The area where your company performs customer service. Company boundaries are defined using the coordinates of the upper left corner and the lower right corner of the area.

Company Settings

A screen in ETAdirect that contains many of the configuration settings. To change your configuration settings, contact TOA support.

Compliance

Following the route as predicted by ETAdirect. A resource is in compliance if he or she starts the activity at the estimated arrival time, completes the activity at the estimated completion time, has minimal idle time, and does not detour from the calculated driving directions.

CSR

Customer Service Representative. A person who speaks with customers and sets appointments.

Customer-Facing Activity

A task that must be performed for a customer. Typically performed at the customer's home or business. Examples include installations, upgrades, and deliveries. See **Activity** for more information.

Daily View

A view that shows to see the calendar of a resource, group, or bucket for a whole week. This view is useful for making small changes to individual calendars in the current week.

Delivery Window

The time that ETAdirect estimates that the resource is expected to arrive at the customer's home or business. The window includes a buffer to account for travel time and the potential for delay. This timeframe is shorter than the Service Window.

Dispatcher

A person who allocates activities and monitors the progress of activities and resources.

Display

A screen in ETAdirect that contains configuration settings used to control what properties and layout structures users can actually see within the forms of the interface. These settings also control the format of some information, for example, the first day of the week in calendar views.

Equipment

See **Inventory**.

Estimation

A term used in Capacity Management also referred to as "capacity estimation" which determines the number of man-minutes available for a particular time slot based on resource calendars.

ETA

Estimated Time of Arrival The time that ETAdirect predicts that the resource will arrive at the customer's location. ETA for pending activities is calculated dynamically from historical data. For completed activities, the ETA is the time when the resource actually arrives at the customer's location.

Field

Property present in the system by default

Filters

Typically, a set of parameters used to reduce the results of a search. Filters are also used in routing plans to predefine the information that routing uses to distribute activities to resources.

Forecasting

New feature of ETAdirect allowing to forecast the company workload on the basis of historical data

Glossary

The configuration dictionary that maps default names, labels, and phrases use in the interface to the client's preferred names, labels, and phrases. **Note:** Property names are managed in the Properties screen.

GUI

Graphical User Interface, allowing people to use software by manipulating images rather than by issuing text commands.

Group

A container in the Resource Tree used to sort and organize the other items in the Resource Tree. Groups are typically used to sort resources by location. Groups cannot own a route and you cannot assign activities to them.

Hint

A pop-up window that displays additional information about the activity or resource that you select. Hints also contain actions links that can take you directly to the action that you want to perform on the item.

Historical data

Data of the past periods available in the database or from other sources

Holidays

A screen in ETAdirect where you can define the dates that outgoing communications of certain messages are blocked.

Idle Time

Any time that a resource spends not in transit or not working on an activity.

Internal Activity

A task that is not performed directly for the customer. Internal activities typically do not take place at the customer's home or business. Examples include vehicle maintenance and company meetings. See **Activity** for more information.

Inventory

A list of items managed within ETAdirect and can include various inventory pools as well as serialized and non-serlialized parts. See **Inventory Pools**, **Trunk stock**, **Non-serialized Inventory**, and **Serialized Inventory** for more information.

Inventory Pools

Inventory associated with a resource, typically **Trunk stock**, end customer, or warehouse.

Jeopardy Situation

A situation in which ETAdirect predicts that the activity will miss its promised service window. Predicted jeopardy situations are colored pink in the ETAdirect interface.

List View

A chronological list of the day's activities for the selected resource, group or bucket. Activities are ordered by estimated start time.

Login Policies

A screen in ETAdirect that sets the requirements for logging in and for usernames and passwords.

Manage

The core module of ETAdirect. Includes all of the main functions including monitoring, routing, and reporting.

Map View

A view of the day's activities for the selected resource, group, or bucket. This view tables the activities on a map.

Mass Activity

An activity involving 2 or more resources.

Max Available

The maximum capacity available by calendar on the selected day, time slot or capacity category

Message Scenarios

A Message Scenario is a set of rules that specifies how to process a message notification or transaction. Message Scenarios are launched by Notification Triggers. See **Notification Triggers** for more information.

Min quota

The minimum number of minutes to be allocated for booking of the activities belonging to the selected time slot (only on time slot and capacity category level).

Mobility

The user interface for ETAdirect that is accessed through a mobile device. Field service representatives typically use this interface. It is a separate module of ETAdirect.

Non-Instantiated Activities

All activities not part of quota management (for which no capacity category associated with work skills exists)

Non-Scheduled Activity

An activity that is not assigned to a specific date.

Non-Working Reasons

A calendar setting used when a resource is absent. Typical non-working reasons include illness, vacation and bereavement.

Non-Serialized Inventory

Inventory associated with a part that is generically defined within ETAdirect so that Trunk stock might be decremented based on required inventory associated with activities. (Nota bene: Any part can be defined as "non-serialized inventory" even those parts with serial numbers on them. For example, a cable modem with a serial number, can be "Non-serialized inventory" within ETAdirect so that Trunk stock inventory levels can be managed daily and associated with a route). See **Serialized Inventory** and **Required Inventory** for more information.

Not Done Activity

A status used to identify an activity that cannot be completed today. For activities that cannot be completed right away, but can be completed today. See **Suspend** for more information.

Not Ordered appointments

Aare the ones which order of execution was not defined. Such appointments do not have ETA. Provider, dispatcher or routing may define the order (for example command change order in mobile interface or edit appointment command in web interface).

Notification

Message Activity related information sent by ETAdirect to a customer, a resource, a dispatcher, or another system. Notification can be received through telephone, email or SMS.

Notification Triggers

Workflow events that invoke Message Scenarios when a particular internal event occurs. As a result, messages are delivered to customers. For example, if you use a post activity survey, you might have a notification trigger to launch the post activity survey message. In this case, when a customer-facing activity is completed, a Notification Trigger launches a Message Scenario that sends the post activity survey message to the customer. See **Message Scenarios** for more information.

Ordered appointments

Means that the order of execution is defined - resource, SmartRouting or dispatcher have already defined that this appointment will be executed after another defined appointment. In this case appointment gets an estimated time of arrival and is classified as ordered.

Other activities

Include only repeating, mass and shift activities including those without instances. See **Non-instantiated Activities** for more information.

PAS

Post Activity Survey. A survey that you might send to your customer after the activity is completed to measure their satisfaction.

Pending Activity

An activity status used for activities that are scheduled but not yet started.

Percent Quota

Percent of the capacity that is available for booking.

Percentage to Stop Booking

The percentage of the used quota at which activities booking is to be stopped. If an API call is ?????

Permissions

A screen in ETAdirect where you can configure which features users can see and use. Permissions are applied to Profiles, not individual users. See **Profiles** for more information.

Placeholder ID

A number used to identify names, labels, and phrases used in the ETAdirect interface. Each name, label, and phrase has a unique number.

Planning

Company's estimation of the workforce or workload required at a certain moment.

Post Activity Survey

A survey that you might send to your customer after the activity is completed to measure their satisfaction.

Profiles

A screen in ETAdirect where you can configure groups of users. Those groups are then assigned Permissions to control which features they can see and use. See **Permissions** for more information.

Properties

A screen in ETAdirect where user interface fields are defined. You can specify details such as field length, field type, and valid values.

Provider

Technician Resource Person who performs work at the customer's premises (the one who provides the service). A low-level entity on the Resource Tree, a child of a bucket or group. A resource can also represent regular work teams, equipment, trucks etc.

Quota

A limitation set on the number of activities booked within a selected day, time slot or capacity category.

Quota Management

A process of defining the amount of work (per work skill and time slot) that a company should perform for a specific area (example: bucket) for a specific day. There is a related process, Capacity management, that defines the reverse relationship.

Quota Matrix

The number and type of appointments that you book directly affects the ability of the SmartRouting module to optimize the routes.For example, if you overbook your activities, you will not have enough time and resources to accomplish all of them. If you book a lot of activities that require the installation work skill, but you only have a few resources who are qualified to perform that skill, then the SmartRouting module will not be able to make good matches for those activities.

Repeating activity

An activity recurring with a predefined frequency in a predefined period.

Regular Work Zone

A region where a resource's activities are typically located.

Required Inventory

When a particular resource's route includes activities associated with non-serialized inventory,ETAdirect can highlight where Trunk stock is insufficient. In the event that a resource's Truck stock is insufficient for a particular route, required inventory highlights the job and indicates which Non-serialized inventory components are missing.

Resource

An element in the resource tree representing a defined company asset. Put another way, a Resource is the ETAdirect entity representing someone (or something) which provides service on behalf of the company.

Resource Calendars

A view of a resource's calendar that displays the details about an individual resource's schedule. This view is useful for making changes that involve more than one day or more than one resource. See **Calendar** and **Daily View** for more information.

Resource Tree

A hierarchical view of the organization's resources, typically sorted by geographical region. It is displayed on the left side of the screen in Manage.

Resource Types

A set of characteristics that you can apply to a resource. Default Resource Types are Groups, Buckets, and Resources. See **Group**, **Bucket**, and **Resource** for more information. If you want to change the Resource Types that you use in ETAdirect, contact TOA support.

Route

Queue A list of activities and activities assigned to a resource for a specific date.

Route by Inventory

A concept within ETAdirect that limits routing options based on each resource's trunk stock and those activities associated with non-serialized inventory.

Routing

The act of assigning activities to resources. ETAdirect routes activities to resources using a sophisticated algorithm that considers a number of factors including calendars, work zones, and work skills.

Routing Plans

Routing plans provide the rules that ETAdirect uses to route activities to resources. Routing plans work together with the other ETAdirect components to apply your business goals and strategies to the routing process.

Routing Profiles

Containers that hold routing plans. Routing Profiles can be assigned to buckets. You can use Routing Profiles to assign several routing plans at once.

Scheduled Activity

An activity that is assigned to a particular day and a particular time slot.

Scheduled, Not Ordered Activity

All Day ActivityAn activity that is assigned to a particular day, but is not assigned to a particular time slot.

Serialized Inventory

Inventory parts that are unique and cannot be decremented based on a route's activities. See also: Non-serialized inventory, Required inventory.

Service Level Agreement

The time window that the activity must be **completed** in. This window is promised to the customer.

Service Window

Time Slot. The time window that the activity must be **started** in. This window is promised to the customer. This timeframe is longer than the Delivery Window.

Shifts

Patterns of working time. You can create separate shifts for each of the different working time patterns within your organization.

SmartCollaboration

A separate module for ETAdirect that provides a real-time, context-aware collaboration tool for all ETAdirect users. With SmartCollaboration, a user can, for example, locate nearby, working resource and share details about a resource, activity, or inventory item. Also, SmartCollaboration supports a confirm-receipt process for moving an activities or inventory which is always valuable but even more so when resources are in remote locations and potentially off line.

SmartLocation

SmartLocation uses geo-location information to display a resource's actual location on a map in real time. In addition, the feature can compare the resource's actual route to the projected route within ETAdirect. Resource location can be derived either from a vehicle-installed GPS device communicating via API to ETAdirect and / or through a GPS-enabeled mobile phone with an open HTML5 browser.

Status

A term with specific and different meanings depending on the ETAdirect module used.

- Capacity and Quota management status refers to a specific work zone and whether it is open or closed.
- SmartManage and SmartMobility, the term "appointment status" (but sometimes shortened to "status") refers to whether a routed job is pending, started, completed, not done, suspended, canceled, or deleted. See **Appointment Status** for more information.

Statistical Parameters

A screen in ETAdirect where you can configure the parameters used when collecting and analyzing statistics. ETAdirect uses statistical data on actual appointment and travel duration to calculate estimated time of arrival and delivery window. Additionally, Routing uses the statistics to assign appointments to resources in the most effective manner.

Suspend

An activity status that allows an activity to be postponed if the work cannot be completed right away. Suspend allows the activity to be completed at a later time during the day. For activities that cannot be completed in the same day. See **Not Done Activities** for more information.

Team Leader

In a Teamwork activity, the resource who is being assisted. In the Resource Tree, the arrow points to the Team Leader. See **TeamwTeamwork on page 27ork** and **Assistant** for more information.

Teamwork

An activity that is performed by two resources. One resource is the Team Leader and the other resource is the Assistant. See **Team Leader** and **Assistant** for more information.

Technician

A resource that performs technical services on behalf of the company.

Time Slots

Date and time interval that defines when an activity has to be started; this time is typically agreed to between the customer and client.

1. A fixed service window defined with a name and label, specifying when certain types of activities can be performed.
2. Service Window (if the activity type does not support time slots)

Time View

A view of the day's activities for the selected resource, group or bucket on a Gantt table. Activities are displayed on timelines, with each activity as a block of time.

Travel Areas

Travel areas define the maximum allowed travel territory for a company.

Truck

A default Resource Type. See **Resource Type** for more information.

Trunk Stock

Inventory carried in a vehicle. See **Inventory pools**) for more information.

Unscheduled Activity

An activity that could take more than one day to complete.

Used

A term in in Capacity and Quota management representing the duration of all activities booked for the selected day, time slot or capacity category.

Used Quota Percentage

The percentage of the quota used by the booked activities.

User

A person who uses ETAdirect. An account used by a resource, dispatcher, manager, etc. to log into ETAdirect.

1. A person using ETAdirect
2. An entity used for authentication and authorization, allowing people or external software to access ETAdirect Work Skill 1) An activity that a resource is

Visit

A group of activities that are all performed at the same location on the same day.

Web Services Description Language

WSDL An XML-based interface description language that is used for describing the functionality offered by a web service. A WSDL description of a web service (also referred to as a WSDL file) provides a machine-readable description of how the service can be called, what parameters it expects, and what data structures it returns. It thus serves a purpose that corresponds roughly to that of a method signature in a programming language. *(source: Wikipedia).*

Work Schedules

Work schedules are templates made up of a combination of shifts and non-working times. When grouped as a work schedule, these shifts and non-working times can be applied all at once to a bucket or to an individual resource. To change, add, or remove Work Schedules, contact TOA support.

Work Skill Levels

ETAdirect matches resources to activities through shared work skills and work skill levels. As a result, the way you configure work skills and work skill levels has a direct impact on the matches that ETAdirect creates between activities and resources.

1. An activity that a resource is qualified to perform (resource property) .
2. The qualification required to perform an activity (activity property).

Work Skill

Work skills are sets of skills or competencies that resources are qualified to perform. To change, add, or remove Work Skills, contact TOA support.

Work Skill Conditions

The data that ETAdirect uses to assign work skills to activities.

Work Zone

Defined geographical area where a resource is authorized to perform service.

Work Zone Dictionary

A screen in ETAdirect where Work Zones are defined. The Work Zone Dictionary lists all defined work zones and their associated keys. To add, change, or remove work zones, contact TOA support.