



SmartLocation User Guide


Part Number E62345_01

Contents

About this Document.....	5
Getting Started with ETAdirect.....	7
Chapter 1: Using SmartLocation.....	9
Technical Functionality.....	9
Compatible Browsers.....	9
Requirements to Send Data through the Mobile Device.....	9
Requirements to Send Data through the Device in the Vehicle.....	10
Setting Up SmartLocation.....	10
Turning on the SmartLocation Features.....	10
Configuring SmartLocation Settings.....	10
Troubleshooting SmartLocation.....	11
Verifying that the Resource is Following the Route in Map View.....	11
Verifying that the Resource is Following the Route in Time View.....	11
Locating a Resource.....	12
Identifying Idle Time.....	12
Glossary.....	15

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.

Document Release Date: October 2013.

Copyright © 2013 TOA Technologies USA, Inc. All rights reserved. ETAdirect are registered trademarks of TOA Technologies USA, Inc.

All other trademarks and registered trademarks are the property of their respective owners.

The names of companies and individuals used in any sample database or as examples in the documentation are fictitious and illustrate the use of the software, only. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of TOA Technologies.

This document may contain examples of data screens or reports or other descriptions or examples, which use the names of individuals, companies, brands, categories, products and/or product codes. All of these names and codes are fictitious, and any similarity to the names and codes used by an actual person or entity is entirely coincidental.

Contacting TOA Technologies

TOA Technologies, Inc.

333 Richmond Rd, Suite 420

Beachwood, OH 44122-4196

Contact **documentation@toatech.com** for information.

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:

- **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 activity is a risk, you can move it to avoid the service window being missed.

Using SmartLocation


Topics:

- **Technical Functionality**
- **Setting Up SmartLocation**
- **Verifying that the Resource is Following the Route in Map View**
- **Verifying that the Resource is Following the Route in Time View**
- **Locating a Resource**
- **Identifying Idle Time**

SmartLocation is part of ETAdirect, a mobile workforce management application.

SmartLocation uses GPS information to display the resource's actual route on a map in real time. In addition, the feature can compare the resource's actual route to the projected route. This information can help you perform the following tasks:

- **Locate a resource:** When you need to know where a particular resource is, you can quickly identify the location and the activity being performed. With the details provided in the interface, you can also estimate whether the next activity will be delayed and when the resource will arrive at the next activity.
- **Identify idle time:** SmartLocation displays idle time on a map so that you can quickly identify where and when the resource was idle.
- **Verify that a resource is following the route as expected:** SmartLocation tables the resource's actual route against the projected route so that you can easily tell whether the resource is following the prepared route. At glance, you can tell if there is a problem with the route like a delay at the activity, heavy traffic, or a detour.

 **Important:** This guide only covers tasks associated with the SmartLocation module. See the SmartManage User Guide for information about other ETAdirect dispatch and administration tasks.

Technical Functionality

SmartLocation populates the Map view with the resource's location information.

It uses GPS information from the resource's mobile device or from the device in the vehicle to create this view.

Compatible Browsers

The following platforms and browsers are compatible with SmartLocation:

- Android 2.2 and later
- Blackberry OS 6 and later
- iOS 4.2 and later
- Mozilla Firefox Mobile 4.0 and later
- Mozilla Firefox Desktop 3.6.14 and later

To test your compatibility go to www.c.etadirect.com

Requirements to Send Data through the Mobile Device

When you use the resource's mobile device to send GPS information, the following items are required for SmartLocation to work correctly:

- ETAdirect must be configured and running.

- The device must be capable of collecting GPS information and transmitting it using the device's Internet browser. This capability must be native to the device. The solution does not work with external devices for GPS and WIFI.
- The mobile device that contains the GPS tool must support html 5.
- The resource must be logged in to the ETAdirect interface on the mobile device.
- The resource must accept the browser request to share location data with ETAdirect.

Requirements to Send Data through the Device in the Vehicle

When you use the device in the vehicle to send GPS information, the following items are required for SmartLocation to work correctly:

- ETAdirect must be configured and running.
- You must write an application to transfer the data from the device to ETAdirect through the ETAdirect SDK. See the GPS API SDK for detailed instructions.

Setting Up SmartLocation

You must activate a number of settings in ETAdirect Manage before SmartLocation will work.

Turning on the SmartLocation Features

Before resources, dispatchers and other users can use the SmartLocation features, you must turn them on.

1. In the Web interface, navigate to **Company > Settings > Permissions**.
2. In the tree on the right side of the screen, navigate to **Company Settings > Map > GPS > Smart GPS**.
3. In the main window, select **Show** next to the profiles that you want to have access to SmartLocation.

Configuring SmartLocation Settings

You must configure the SmartLocation in ETAdirect to activate the communication between the device and the system. You can also customize the display of certain SmartLocation information in the interface.

Perform the following steps:

1. In the Web interface, navigate to **Company Settings > Business Rules**. Under GPS, fill in the fields as described below:
 - **Identify technician by:** The property to use to identify the resource when you use the GPS device in the vehicle and the GPS API. You can leave this field blank if you use the resource's mobile device to send GPS data.
 - **Resource is considered idle if moved less than ... meters within ... minutes:** The maximum distance moved and the minimum amount of time idle to use to determine that a resource is idle. 500 meters and 30 minutes are typically good values.
 - **Resource is considered to be at the activity location if the distance to it is less than ... meters:** If the resource is further away from the activity location than this value, than the resource is considered not at the activity location. 100 meters is typically a good value.

2. Company Settings > Resource Types

In the row for the Resource that sends the GPS data, click **Modify**.

Check the following boxes:

- Track geolocation in Mobile Interfaces
- Calculate coordinates with high precision

3. Optional: Navigate to Company Settings > Display. Under Map, complete the settings below:

- **Fade resources:** Check this box to fade and hide resource icons when GPS data is not received after a certain amount of time.

- **Fade resources in:** When the GPS data is not received for a certain amount of time, the resource's icon appears transparent, or faded, on the map. This setting determines that amount of time. You must check the **Fade Resources** box to activate this setting.
- **Hide resources in:** When the GPS data is not received for a certain amount of time, the resource's icon is removed from the map. This setting determines that amount of time. You must check the box to activate this setting.

Troubleshooting SmartLocation

If SmartLocation is not working properly, there might be a problem with the configuration.

See the following list of common problems and the possible solutions:

- **Location dots are not displayed in Map view in the Web interface:** Verify that Show Provider Trace is checked in the View drop-down menu. Verify that the user account is tied to a resource.
- **Data for a resource is not displayed in Map view in the Web interface:** The resource did not authorize the mobile device to send GPS data to ETAdirect. The resource must accept the browser request to share location information. The resource closed his internet browser or logged out of the mobile interface. Ask the resource to log back into the ETAdirect mobile interface.

Verifying that the Resource is Following the Route in Map View

SmartLocation provides details in the Map view of the Web interface that you can use to verify that the resource is following the route.

Perform the following steps:

1. View a resource in map view. The route displays.
2. On the View drop-down menu, select **Show Driving Directions** and **Show Provider Trace**.
3. ETAdirect compares the resource's actual route to the route that is projected by ETAdirect. Colored dots indicate the locations that the GPS sent back to ETAdirect.

The colors represent the following statuses:

- **Blue dots:** indicate locations that the GPS device sent to ETAdirect that are compliant with the projected route.
- **Red dots:** indicate locations that the GPS device sent to ETAdirect that are outside of the projected route.
- **Yellow dots:** indicate idle time.

Verifying that the Resource is Following the Route in Time View

SmartLocation provides details in the Time view of the Web interface that you can use to verify that the resource is following the route.

Perform the following steps:

1. View a resource in time view. The schedule displays.
2. Look for red lines under the scheduled activities. These lines indicate that the resource is off of the projected route or is idle. They could indicate that the resource is not following the projected route.
3. Short excursions could be due to heavy traffic or road closures. Longer excursions might indicate a problem worth investigating.
 - **Optional:** Compare the information in this screen with the SmartLocation information in Map view to help you determine whether the resource is on schedule.
 - **Optional:** If you cannot tell whether the resource is on schedule, you might also contact the resource to verify that everything is OK and that customers are receiving the anticipated service within the promised window of time.

- **Optional:** Move activities as necessary to ensure that customers receive the expected level of service.

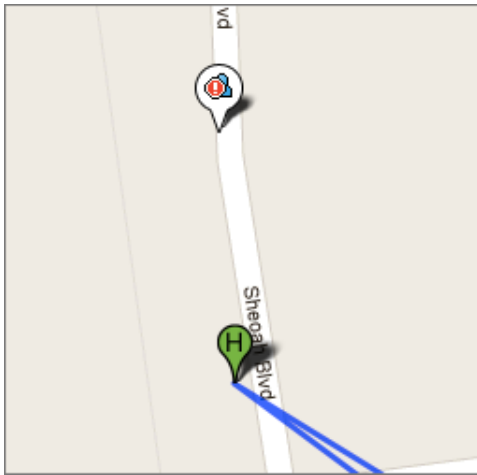
Locating a Resource

You can use SmartLocation in Map view of the Web interface to find a resource's current location.

Perform the following steps:

1. View a resource in **Map View**. The route displays.
2. On the View drop-down menu, select **Show Resource Location on Map**.

A Resource icon in a white balloon displays on the map in the position where the resources is currently located.



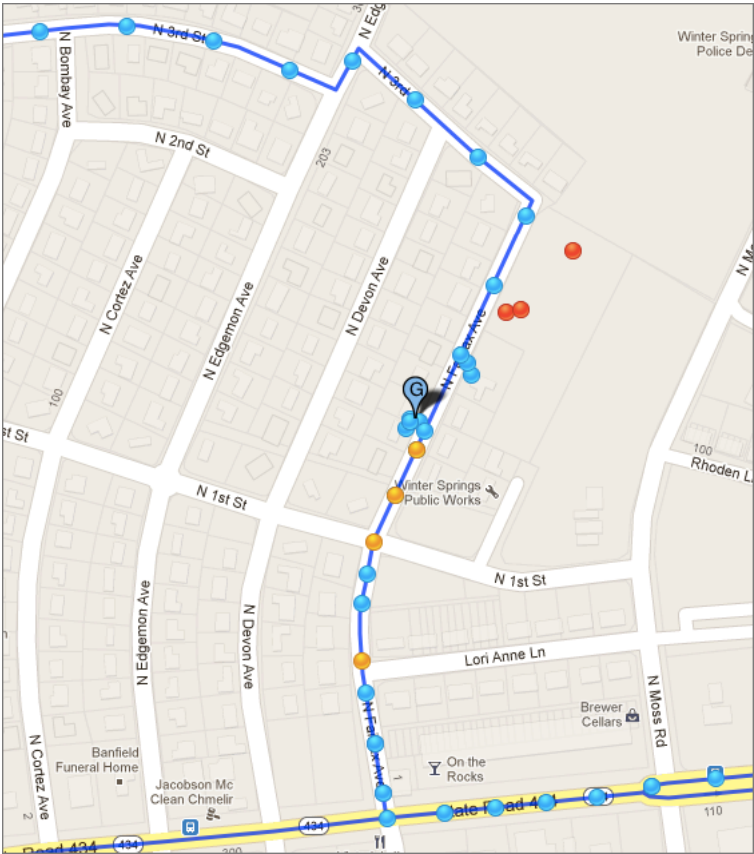
Identifying Idle Time

You can use the SmartLocation module to see idle time on a resource's schedule in Map view in the Web interface.

Perform the following steps:

1. View a resource in map view. The route displays.
2. On the View drop-down menu, select **Show Driving Directions** and **Show Provider Trace**. The resource's actual route is tableed on top of the projected route.
3. Look for yellow dots along the route.

These dots indicate that the resource was not engaged in an activity.



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 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 with pending 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)

- *Prewrite*: appointment created by the Prewrite command. This command is applied to a regular appointment and creates a clone of it with the type prework to distinguish between the two. Prewrite 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-serialized 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

Are 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 Activity An 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-enabled 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 **Teamwork on page 27** 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.