



SmartMobility User Guide


Part Number E62347-01

Contents

About this Document.....	5
Getting Started with ETAdirect.....	7
Chapter 1: Beginning Your Day.....	9
Logging in to ETAdirect.....	9
Changing Your Display Mode.....	9
Checking Your Schedule.....	11
Activating your Route or Queue.....	11
Chapter 2: Working with the Activities on Your Route.....	13
Viewing Activities.....	13
Color Codes in the Views.....	14
Starting an Activity.....	16
Adding an Internal Activity.....	16
Adding Time to an Activity.....	17
Suspending an Activity.....	18
Marking an Activity as Not Done.....	19
Rescheduling an Activity.....	21
Completing an Activity.....	22
Adding Details to an Activity.....	23
Chapter 3: Finding the Location of an Activity on Your Route.....	25
Viewing the Location of an Activity on the Map.....	25
Viewing Directions to the Next Activity on your Route.....	26
Viewing Information About the House or Building.....	28
Viewing the Street where the Customer Address is Located.....	28
Viewing the History of an Activity.....	29
Chapter 4: Working with Unrouted Activities.....	31
Searching for Nearby Activities.....	31
Chapter 5: Working with Inventory.....	33
Viewing Inventory.....	33
Adding, Exchanging, or Uninstalling Inventory.....	34
Sending Information to a Piece of Inventory.....	36
Chapter 6: Working as Part of a Team.....	39
Chapter 7: Ending your Day.....	41
Deactivating the Route.....	41
Logging Out.....	42
Best Practices Checklist.....	42
Working Offline.....	43
Customizing the Interface.....	43
Changing Your Password.....	44
Glossary.....	45

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

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

Beginning Your Day

Topics:

- **Logging in to ETAdirect**
- **Changing Your Display Mode**
- **Checking Your Schedule**
- **Activating your Route or Queue**

The actions you take at the beginning of the day are important to the workday ahead. This section explains how to log in to ETAdirect, view your activities, and activate your route.

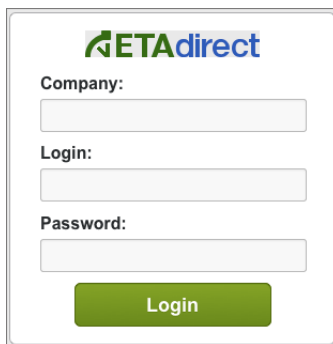
Logging in to ETAdirect

You will use ETAdirect to communicate with dispatch and management throughout the course of your day using a device such as a tablet, smart phone, or laptop. Simply browse to the URL provided by your system administrator.


Logging in requires a login name and password. Your system administrator assigns login names and passwords. Any web-enabled mobile device can access ETAdirect.

Follow these steps to log into ETAdirect:

1. Type this address in the address bar of your mobile web browser: <http://companyname.etadirect.com/xhtml>
2. The ETAdirect login window displays:



3. Type your company name in the **Company** field.
4. Type your username in the **Login** field.
5. Type your password in the **Password** field.
6. Click **Login**.

 **Note:** You will be automatically blocked from accessing ETAdirect if you enter the wrong password multiple times. If you forget your password, contact your system administrator.

Changing Your Display Mode

Users can decide for themselves whether to view the Activity Details and Inventory Details screens in classic, tile or multi-screen mode. The choice is available on the User Options screen.

To change your display mode:

1. Click the **Options** button from the strip menu that runs across the top of the screen.

The User options screen displays as shown above.

2. View your choices in the drop-down under *Display forms mode*.
 - **Classic** is the default Standard display.

- **Tile mode** arranges data in columns from left to right until the screen has been filled.

- **Multi-screen** offers a left scroll button so users can roll through a series of displays.

3. Bear in mind that the amount of information will not change, only the way in which it displays on your screen.
4. Select your preferred display mode from the drop-down.
5. Click **Submit**.

Checking Your Schedule

After logging in, you see the ETAdirect main screen. This is a summary view of your daily route. Activities are grouped by their status.

Activating your Route or Queue

You must activate your route at the beginning of every workday. You cannot start an activity until your route has been activated. This is a signal to the dispatcher and to your supervisors that you are ready to work and available to take jobs.

To activate your route:

1. Log in to ETAdirect. A list of your activities for the day is displayed.
2. Click the **Activate Queue** button.

A confirmation screen displays.

3. Click **Yes**.

Chapter
2

Working with the Activities on Your Route

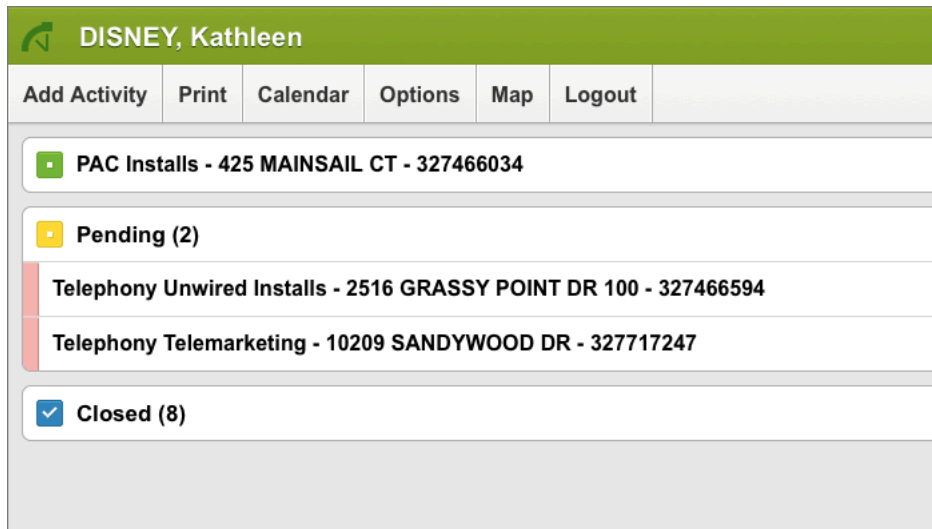
Topics:

- **Viewing Activities**

Most of the work you do in the Mobility application will involve activities. Use this interface to view activities and activity details, start activities, complete activities and assign status to activities.

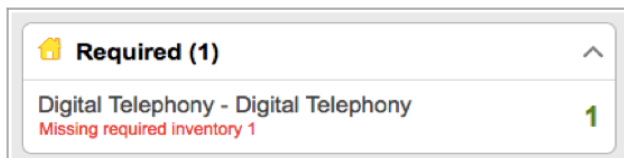
Viewing Activities

The activities listed on your home screen are grouped by status. Pending activities are displayed at the top of the screen and closed activities are displayed at the bottom.



Pending activities appear in chronological order. Click **Closed** to expand that section and see all of the closed activities.

The system notifies you immediately if you are missing any of the inventory required to complete an activity on your route.















If you see this notice in red, open the Activity Details screen and make arrangements for picking up inventory before you travel to the customer location. There are many ways to resolve an issue like this, but the missing required inventory notice prevents you from showing up empty handed at a customer site.

Color Codes in the Views

The activities displayed in the Work Area are classified by color; this provides you with a quick view of the status of the day's schedule.

The table below explains each of the default colors an

 **Note:** Color codes can be changed during implementation to reflect the colors your company prefers for representation of the various activities.


	Pending activity (on time).
	Pending activity (in jeopardy of being late).
	Not ordered activity.
	Pending internal activity or teamwork.
	Started activity or teamwork.
	Ended activity.
	Suspended or cancelled activity or teamwork.
	Travel time.
	Ended activity.
	Not done activity.
	Pre-work, or re-opened activity.

The colors in ETAdirect are consistent throughout all the views. For example, started activities are always green whether you are in List view, Time view or Map view. For quick reference, this list is also available under **Help**.

Viewing Activity Details

When you want to know more about an activity, you can view the activity details.

The activity details screen includes information like customer name, account number, work order type, primary phone number, and promised ETA. Depending on your configuration, this screen also includes links to further details about customer contact information, house description, and the ability to create a Service Request Order.

 **Note:** This screen is often configured to closely fit the needs of the business. As a result, your view might differ from the one in this guide.

To view activity details, click on the activity in the main screen. The Activity detail screen displays.

Home **Activity Details**

Complete Adjust Time Not Done Suspend Map Inventory

Status: **Started**

Activity Type: **Telephony Unwired Installs**

Work Order: **137165179**

Account Number: **019897120**

Name: **Darrio Fearing**

Address: **2516 GRASSY POINT DR 100**

City: **LAKE MARY**

ZIP: **327466594**

Phone: [555760757324](tel:555760757324)

Time Slot: **13-15**

Start - End: **17:15 - 17:44**

Problem Code: **23 PPV PROBLEM**

W/O Type: **TC**

Work Order Class: **C**

Additional Info
House
Create SRO

Viewing Additional Information about an Activity

From the Activity Details screen, you can access additional information about this job.

1. Select an activity from your home screen. The Activity Details screen displays.
2. Scroll to the bottom of the Activity Details screen.
3. Click the **Additional Info** button. Additional Information about this activity displays:

Details **Activity Details** 🏠
7
297:46

Complete Adjust Time Not Done Suspend Map Inventory

Job Number: **001A**

Map Grid: **BB13**

Node ID: **BB134**

Services List:

Code	Description	From	To
101	BASIC	4	4
102	STANDARD	4	4
173	DIGTL PREM	1	1
175	DVR SVC	1	1
200	HBO	1	1
202	STARZ	1	1
203	CINEMAX	1	1
205	SHOWTIME	1	1
208	MOVIE PLEX	1	1
231	HBO 6 PLEX	1	1
233	MAX 4 PLEX	1	1

4. Click the **Details** button to return to the activity details screen.

Starting an Activity

When you arrive at an activity, you must start that activity in ETAdirect. ETAdirect uses this data to project activity durations, travel time, and distance.

Note: Scheduled activities must always be started in order. In other words, you can only start the next activity in the list. Unordered activities are different. They can be started at any time.

Get into the habit of starting activities as soon as you arrive at the customer's location, even before you get out of your vehicle. If you forget to start an activity on time, contact dispatch so that they can start the activity and enter the correct start time for you.

To start an activity:

1. Click the first pending activity in the list on your home screen. The Activity Detail screen appears.


2. Click the **Start** button. A confirmation screen displays.

3. Click **Submit**. The activity starts and you are returned to the activity screen.

Adding an Internal Activity

For ETAdirect to provide accurate estimates, you must account for all of your time while working. If you have the right system permissions, you can add activities to your route for work you do that is not customer

facing. You might add an activity for a company meeting, a lunch break, vehicle maintenance, or a stop for gas.


 **Note:** If you do not have permission to add an internal activity, you can contact dispatch or your supervisor to add an internal activity on your behalf.

To add an internal activity:

1. On the main screen, click **Add Activity**. The **Add Activity** screen displays.
2. Type the information about the activity in the fields and then click **Submit**.

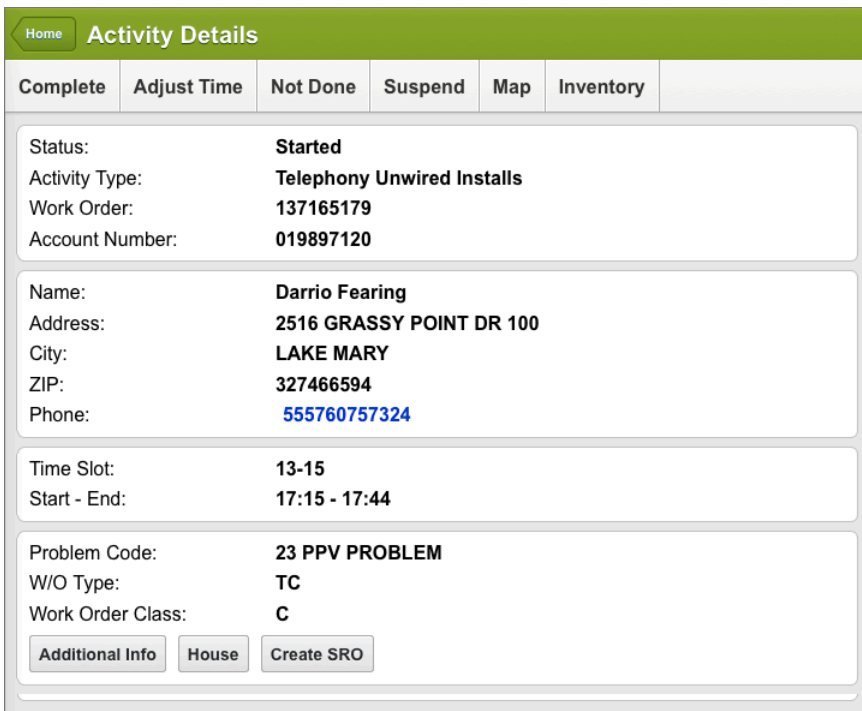
Adding Time to an Activity

If an activity cannot be completed within the estimated duration, use the **Adjust Time** button to add additional time. This action automatically recalculates the activities later in the route.

 **Tip:** After you start your activity, perform a sight survey to determine if more time may be needed. Add time as necessary.

To add time to an activity:


1. Select the activity on your home screen that you want to add time to. The Activity Details screen displays.
2. Click **Adjust Time** (at the top of the screen).



Complete	Adjust Time	Not Done	Suspend	Map	Inventory
Status:		Started			
Activity Type:		Telephony Unwired Installs			
Work Order:		137165179			
Account Number:		019897120			
Name:		Darrio Fearing			
Address:		2516 GRASSY POINT DR 100			
City:		LAKE MARY			
ZIP:		327466594			
Phone:		555760757324			
Time Slot:		13-15			
Start - End:		17:15 - 17:44			
Problem Code:		23 PPV PROBLEM			
W/O Type:		TC			
Work Order Class:		C			
Additional Info		House		Create SRO	

3. Select the number of **additional minutes** this activity requires.

4. Click **Submit**.

 **Note:** When you complete the activity, the actual time you spent is recorded. ETAdirect calculates the real time you spent on the job, regardless of the time that was scheduled or the additional time you requested.

Suspending an Activity

If for any reason, you need to return to an activity at a later time in the route and you do not want to cancel it, the activity can be suspended.

The suspend feature captures the time that you have already spent at an activity and ETAdirect creates a duplicate of the original activity that is non-ordered so that it can be started at any time throughout the day. Only started activities can be suspended. When you return later to complete the work, you must start the duplicate activity.

To suspend an activity:

1. Open the Activity Details screen for that activity.

2. Click **Suspend**. The **Suspend Activity** screen displays.

3. Enter the necessary information and then click **Submit**.

The original activity shows as closed in the list of closed activities, while the duplicate activity appears as a pending activity. You can now move on to the next activity.

DISNEY, Kathleen 7
298:37

Add Activity Start Activity Print Calendar Options Map Logout

Pending (2)

- Telephony Telemarketing - 10209 SANDYWOOD DR - 327717247
- Telephony Unwired Installs - 2516 GRASSY POINT DR 100 - 327466594

Closed (10)

- Warehouse Activity
- Downgrade - 316 CLYDESDALE CIR - 327736898
- Phone Install/Upgrade - 108 KELLY CIR - 327737343
- RR Commercial Install/Upgrade - 1505 W 25TH ST 402 - 327714182
- Cable Upgrade - 108 HOLLOWAY CT - 327716685
- Multi-type Prewired / Reconnects - 280 LAKESHORE DR - 327462714
- Other - 732 KENILWORTH CIR 200 - 327465571
- Lunch break
- PAC Installs - 425 MAINSAIL CT - 327466034
- Telephony Unwired Installs - 2516 GRASSY POINT DR 100 - 327466594

Important: At the end of the day, if you are unable to complete an activity, and your manager has given you approval, you must start the duplicate job and then immediately change the status to **Not Done**.

Marking an Activity as Not Done

When you select Not Done, the activity appears as completed on your route. This status closes the activity so that you can move on to the next customer. ETAdirect automatically assigns the activity to you for the next day as an unscheduled activity.

To assign Not Done status to an activity:

1. From the activity details screen, click **Not Done**.

Home Activity Details

Complete Adjust Time Not Done Suspend Map Inventory

Status: **Started**
Activity Type: **Telephony Unwired Installs**
Work Order: **137165179**
Account Number: **019897120**

Name: **Darrio Fearing**
Address: **2516 GRASSY POINT DR 100**
City: **LAKE MARY**
ZIP: **327466594**
Phone: **555760757324**

Time Slot: **13-15**
Start - End: **13:10 - 13:39**

House Create SRO

2. The Not Done Activity window appears.
3. Enter the explanation (reason) the work could not be done in the Notes section and then click **Submit**.

Not Done Activity

Work Order: **137165179**
Name: **Darrio Fearing**

Notes:

Submit Dismiss

4. The activity moves to the closed list and is color-coded with the Not Done status color.

DISNEY, Kathleen

[Add Activity](#)
[Start Activity](#)
[Print](#)
[Calendar](#)
[Options](#)
[Map](#)
[Logout](#)

Pending (2)

Closed (10)

Warehouse Activity

- Downgrade - 316 CLYDESDALE CIR - 327736898
- Phone Install/Upgrade - 108 KELLY CIR - 327737343
- RR Commercial Install/Upgrade - 1505 W 25TH ST 402 - 327714182
- Cable Upgrade - 108 HOLLOWAY CT - 327716685
- Multi-type Prewired / Reconnects - 280 LAKESHORE DR - 327462714
- Other - 732 KENILWORTH CIR 200 - 327465571

Lunch break

- PAC Installs - 425 MAINSAIL CT - 327466034
- Telephony Unwired Installs - 2516 GRASSY POINT DR 100 - 327466594

Rescheduling an Activity

If the permissions assigned to you allow it, you can reschedule an activity to another day.

1. From the activity details screen, click the activity that you want to reschedule. The Activity Details screen displays.

Activity Details 14:29

[Cancel](#)
[Suspend](#)
[Directions](#)
[Map](#)
[Inventory](#)
[Reschedule](#)

Status: Pending
Activity Type: Multi-type Seasonal
Work Order: 137165122
Account Number: 019921910

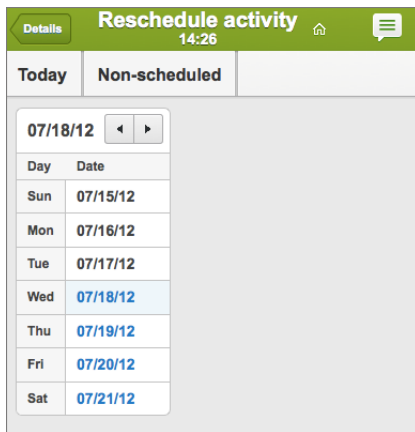
Name: Stephanie Fulcher
Address: 908 W CHARING CROSS CIR
City: LAKE MARY
ZIP: 327466426
Phone: 555760757381

Time Slot: 13-15
Start - End: 13:52 - 14:35
Time notified: 15:15 - 16:30

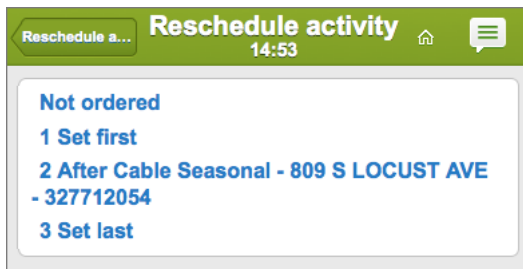
Problem Code: 42 DVR EQUIPMENT PROBLEM
W/O Type: TC
Work Order Class: C
WO Comments: PLS TK 1DVR BOX AND 1 DVR RMT
 P/U 1DIG BOX AND 1 RMT

[Additional Info](#)
[House](#)
[Create SRO](#)

2. Click **Reschedule**.
3. On the **Reschedule Activity** screen, click the date that you want to move the activity to. Blue dates are in the future and can be selected. Black dates are in the past and cannot be selected.



- ETAdirect checks your schedule for that day and then displays the times in your schedule that are available for moving this activity. It also gives you the option of making the activity Not Ordered. If no schedule information is available, ETAdirect displays Not Ordered and Ordered.
- Select the option for this activity.



- Review the alerts in the confirmation screen and then click **Submit**.

Completing an Activity

Once you have completed the work, you must use ETAdirect to close the activity. Depending on your business, completing the activity may include assigning codes, notes, and reasons as well as obtaining a customer signature.

- Open the Activity Details screen.
- Click **Complete**.

The screenshot shows the 'Activity Details' screen with a green header and a navigation bar. The navigation bar includes buttons for 'Complete', 'Adjust Time', 'Not Done', 'Suspend', 'Map', and 'Inventory'. The main content area is divided into three sections:

- Status:** Started
- Activity Type:** PAC Installs
- Work Order:** 137165180
- Account Number:** 019946338

The second section contains customer information:

- Name:** Micheal Terry
- Address:** 425 MAINSAIL CT
- City:** LAKE MARY
- ZIP:** 327466034
- Phone:** 555760757323

The third section shows scheduling information:

- Time Slot:** 13-15
- Start - End:** 15:20 - 16:04

At the bottom, there are two buttons: 'House' and 'Create SRO'.

3. On the End Activity screen, type the information in the fields.
4. Click **Submit**.

Adding Details to an Activity

You can add additional information to an activity in the Activity Details screen.

Depending on your business, you might see different options on the Activity Details screen. This guide covers two common options: details about the house, and creating an SRO.

Adding Information About the House or Building

You might want to add information about the house or building to confirm that you performed the work at the right location. You might also update this information if the customer has changed the appearance of their house since your last visit.

1. Click the activity on your home screen. The Activity Details screen displays.
2. Click the **House** button.

The screenshot shows the 'Activity Details' screen with a green header and a notification icon in the top right corner. The notification icon has a red square with the number '7' and the time '2:08:16'. The main content area contains three dropdown menus:

- Housing Type:** [Dropdown menu]
- House Color:** [Dropdown menu]
- Door Color:** [Dropdown menu]

At the bottom, there are two buttons: 'Submit' and 'Dismiss'.

3. Review the description.
4. Click **Dismiss** if you have nothing to add.
5. Otherwise you can update the type and/or color of the building as well as the color of the door.
6. Click **Submit**.

Creating a Service Request Order (SRO)

You can create a service request order through the mobile application. You can supply information like outlet details, logistics for cable to land placement, and additional notes.

To create a Service Request Order, perform the following steps:

1. **Click** an activity to display the activity details. From the **Activity Detail** screen, click the **Create SRO** link.
2. The Activity Details screen updates to include service order request fields.

Activity Details 7 2:08:14

Replace Outlet:

Dedicate RR Outlet:

Replace/Bury Footage:

Replace/Bury Cable Type:

Replace Aerial Footage:

Replace Aerial Cable Type:

Replace H/R From G/B To Splitter:

Driveway Bore?:

Sidewalk Bore?:

Temporary Cable Used? * :

Bonded To Power?:

SRO Comments:

Submit Dismiss

3. Fill in the fields and then click **Submit**.

Chapter
3

Finding the Location of an Activity on Your Route

Topics:

- **Viewing the Location of an Activity on the Map**
- **Viewing Directions to the Next Activity on your Route**
- **Viewing Information About the House or Building**
- **Viewing the Street where the Customer Address is Located**
- **Viewing the History of an Activity**

ETAdirect provides support for locating the next stop on your route – everything from driving directions to a picture of the street where the address is located. You can also view the history of an activity from your home screen.

Viewing the Location of an Activity on the Map

Before starting an activity, it is possible to view a map of the customer address.

To view the location on a map:

1. Select the activity that you want to map from your home screen. The **Activity Details** screen displays.

Activity Details	
Status:	Pending
Activity Type:	Telephony Unwired Installs
Work Order:	137165179
Account Number:	019897120
Name:	Darrio Fearing
Address:	2516 GRASSY POINT DR 100
City:	LAKE MARY
ZIP:	327466594
Phone:	555760757324
Time Slot:	13-15
Start - End:	17:21 - 17:50
Problem Code:	23 PPV PROBLEM
W/O Type:	TC
Work Order Class:	C
Additional Info House Create SRO	


2. Note that map view applies only activities that have not yet been started.
3. Click **Map**. The map displays as shown below with the customer address at the bottom of the screen.
4. If additional information is needed, see *Viewing the street where the customer activity is located*.

The screenshot shows a mobile map application interface. At the top, there are tabs for 'Details' and 'Map', and a home icon. A notification badge with the number '7' is in the top right corner. The map displays a route with two activity locations marked with numbered pins: a blue pin labeled '1' and a green pin labeled '2'. The map includes various street names and landmarks like Lake Emma, Linden Lake, and Rice Lake. At the bottom of the screen, there is a table with the following data:

Resolved		
#	Address	ZIP
1	425 MAINSAIL CT	327466034
2	2516 GRASSY POINT DR 100	327466594

Viewing Directions to the Next Activity on your Route

When you complete an activity, you can view directions from your current location to the next activity.

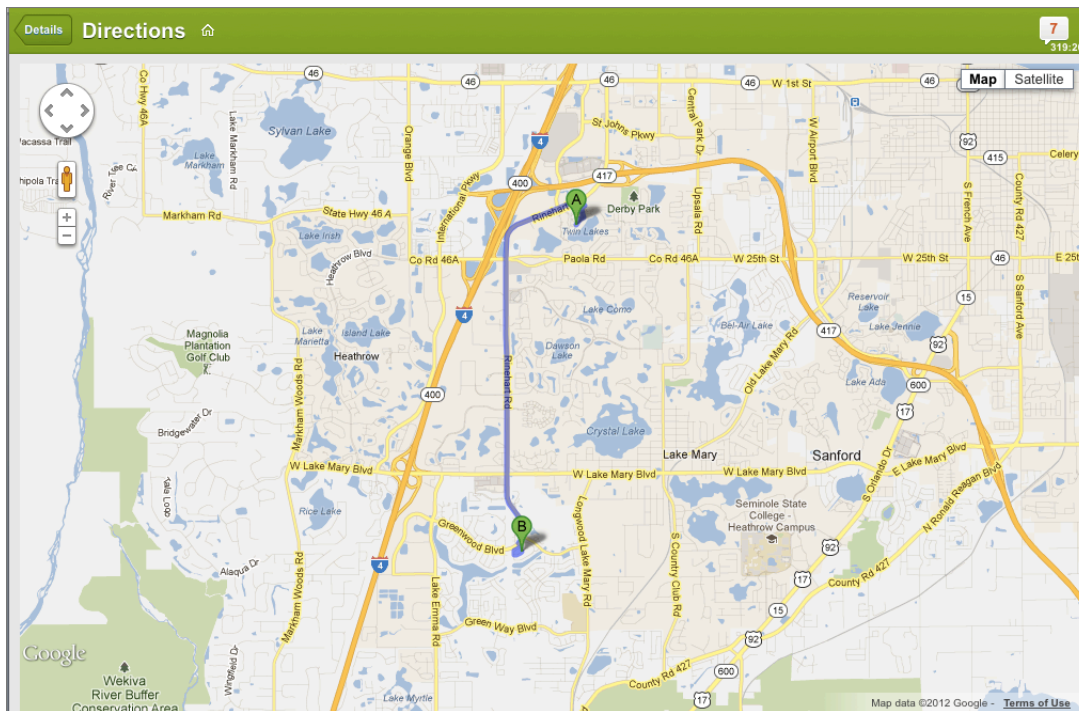
 **Note:** When you view directions for the first activity of the day, the start location that is set up for you in ETAdirect displays.

To view directions to the next location:

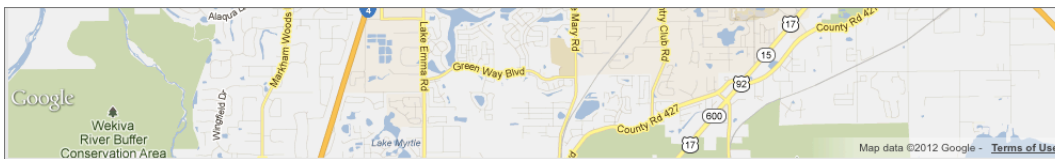
1. Click the next activity on your route from the home screen, The **Activity Details** screen displays.
2. Click the **Directions** button.

Home Activity Details						
Start	Cancel	Prework	Directions	Map	Inventory	Reschedule
Status:	Pending					
Activity Type:	PAC Installs					
Work Order:	137165180					
Account Number:	019946338					
Name:	Micheal Terry					
Address:	425 MAINSAIL CT					
City:	LAKE MARY					
ZIP:	327466034					
Phone:	555760757323					
Time Slot:	13-15					
House		Create SRO				

3. View the map that displays directions from the previous activity (A) to the next activity (B).



Turn-by-turn directions display below the map.




Driving directions:
Sandywood Dr, Sanford, FL 32771, USA

- 1 Head **northeast** on **Sandywood Dr** toward **Myrtlewood Dr** (413 ft)
- 2 Turn **right** onto **Myrtlewood Dr** (108 ft)
- 3 Take the 1st **left** onto **Hill Wood** (0.1 mi)
- 4 Turn **left** onto **Oregon Ave** (387 ft)
- 5 Turn **left** onto **Rinehart Rd** (3.1 mi)
- 6 Continue onto **Greenwood Blvd** (0.7 mi)
- 7 Turn **left** onto **Lakebreeze Cir** (180 ft)
- 8 Turn **right** to stay on **Lakebreeze Cir** (0.1 mi)
- 9 Turn **left** onto **Mainsail Ct**
Destination will be on the right (459 ft)

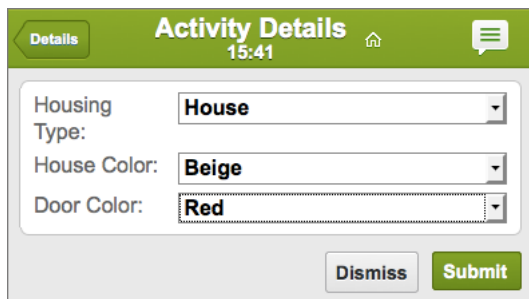
425 Mainsail Ct, Lake Mary, FL 32746, USA

Viewing Information About the House or Building

If you are having trouble locating the house or building, or you want to verify that you are at the right place, you can view details about the house or building in ETAdirect.

 **Note:** Your company might not use this feature.

1. On the main screen, click on the activity that you want to view details about. The Activity Details screen displays.
2. Click the House button. The Activity Details screen updates to display information about the house.



Activity Details 15:41

Housing Type: **House**

House Color: **Beige**

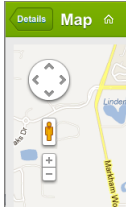
Door Color: **Red**

Dismiss **Submit**

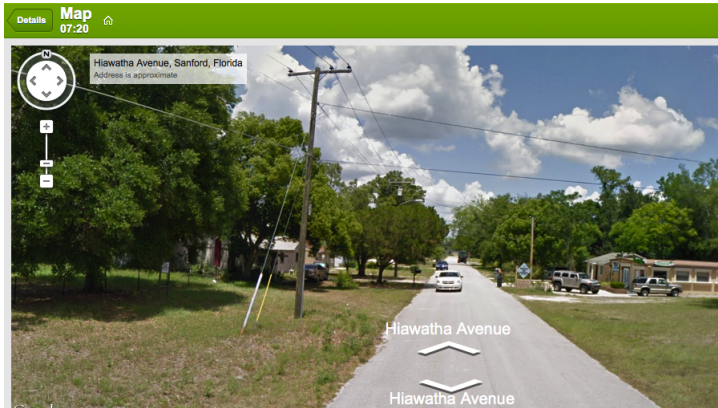
Viewing the Street where the Customer Address is Located

You can use “Street View” to move quickly from a mapped view of the customer location to a view of the street where the address is located.

1. View the map showing the location of the customer address.
2. Drag the “man” icon from the controls in the upper left corner of the map to the number or letter that marks the customer address.

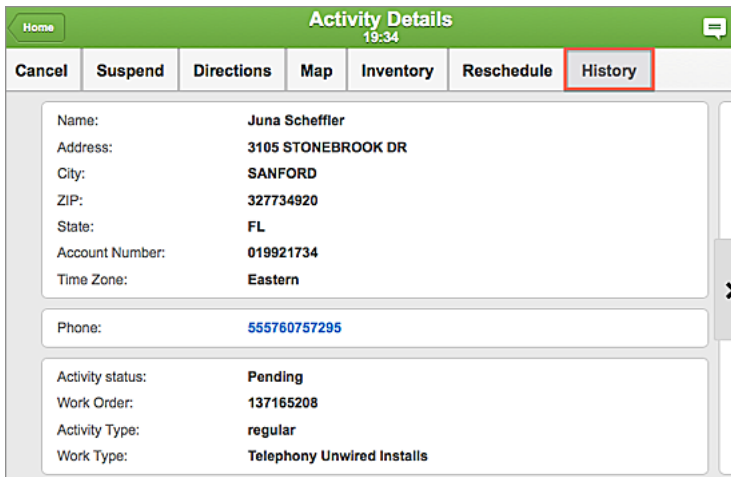


3. View a picture of the street on which the address is located.



Viewing the History of an Activity

Use the History button on the Activity Details screen to see the same information about the history of an activity as the dispatcher/supervisor sees in the Manage module.



Activity History viewed from the Mobility module

Home		History					19:08	
Cancel	Suspend	Directions	Map	Inventory	Reschedule	History		
Action time	Action	Changes			User			
07/18/12 16:34	updated	Start: 15:03 ---- Traveling Time: 00:08			Admin (admin)			
07/18/12 16:36	updated	Start: 14:03 ---- Traveling Time: 00:09			Admin (admin)			
07/18/12 17:01	updated	Start: 15:03 ---- Traveling Time: 00:08			Admin (admin)			
07/18/12 17:01	updated	Start: 14:03 ---- Traveling Time: 00:09			Admin (admin)			
07/18/12 15:53 <small>07/18/12 15:53</small>	updated	Start: 18:02			Florida Engineer (engineer_fl)			

History viewed from the Manage module The tabbed options at the top of the screen vary by configuration. You may not see all these tabs on your screen.

Chapter 4

Working with Unrouted Activities

Topics:

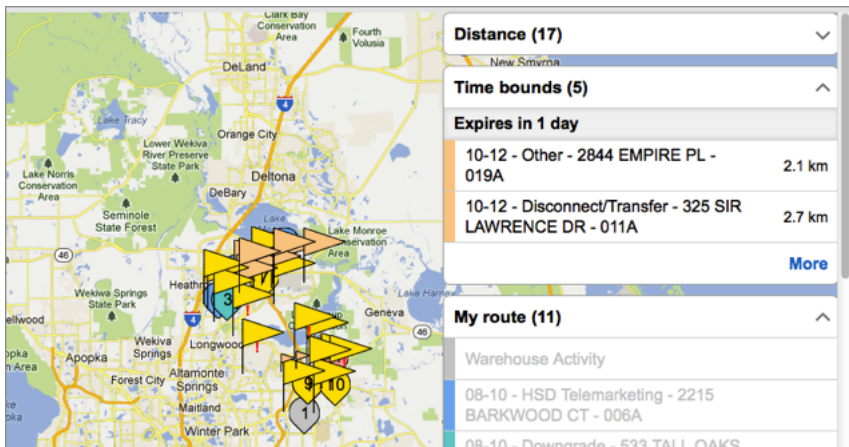
- **Searching for Nearby Activities**

You can use the Nearby Activities screen to view unrouted activities, either in a list or on a map. Depending on your permissions, you might also be able to move the unrouted activities to your route.

Searching for Nearby Activities

Field personnel equipped with mobile devices can consult a map like the one shown below that displays their route as well as any pending and unassigned activities close to their current location. Users configured for self-assignment can add nearby activities to their routes.

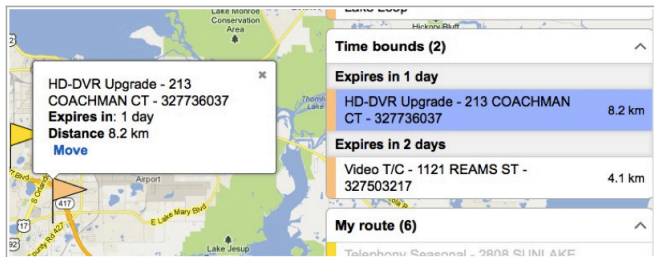
Note: To use this feature you must have the right to **Self-Assign** configured in your User Profile.



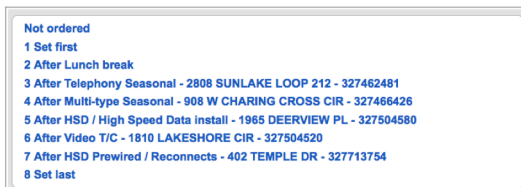
To view unrouted activities in your mobile device:

1. Click **More** on the home screen and select *Nearby Activities* from the drop-down list.
2. View a map that displays your scheduled (numbered) activities as well as colored flags that indicate the status of nearby activities that are unassigned. Both the size of the flag and its color indicate the urgency of the activity:
 - Large flags indicate an activity that is SLA-critical.
 - Smaller flags indicate activities that are not as critical.
3. Zoom out to eliminate the less critical flags from the display.
4. Zoom in to see all activities.
5. Note that the list to the right of the map groups activities based on:
 - **Distance:** This group contains all unrouted activities listed by order of distance from your current location. Activities that are closest to you are listed first followed by activities that are farther away.
 - **Time Bounds:** This group contains all unrouted activities listed in order by SLA window expiration. The activities that will expire the soonest are listed first under subheadings, such as **Expires in 1 day**, **Expires in 2 days**, etc. with 30 days being the maximum expiration period.

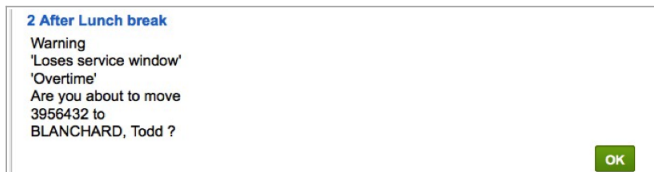
- **My route:** This group includes the activities that are already assigned to your route. You cannot move these activities.
6. Click an item on either the map or the list to display a hint box that includes more information as well as a Move link.




7. Click the **Move** link to display the *Activity Move* screen shown below.



8. Use this screen to position this activity relative to the other activities on your route.
9. View the confirmation screen.



10. Click **OK** to remove the activity from the pending list and place it on your route.

 **Note:** Devices with smaller screens will show either the list or the map but not both. In some cases you may be able to move from one display mode to another by clicking a button in the upper right corner. Follow steps 6-10 above to move an activity from either the list or the map.

Chapter
5

Working with Inventory

Topics:

- **Viewing Inventory**
- **Adding, Exchanging, or Uninstalling Inventory**
- **Sending Information to a Piece of Inventory**

The Inventories List shows all the equipment that is either already present or about to be installed or changed at the customer location.

Viewing Inventory

Open the Inventory tab on the Activity Details screen to see the inventory associated with each job on your route. If you are missing a piece of required inventory, the system alerts you with a message displayed in red. To view inventory details on your mobile device:

1. Click an activity on your home screen. The Activity Details screen displays.

Cancel	Prework	Suspend	Directions	Map	Inventory	Reschedule
Status:	Pending					
Activity Type:	Telephony Telemarketing					
Work Order:	137165178					
Account Number:	019942099					
Name:	Cierra Wanat					
Address:	10209 SANDYWOOD DR					
City:	SANFORD					
ZIP:	327717247					
Phone:	555760757325					
Time Slot:	15-17					
Start - End:	15:06 - 15:46					
House Create SRO						

2. Click the **Inventory** button to view the **Equipment List**. The equipment list displays.

Details Equipment List	
Add to Installed	Add to Deinstalled
Customer (1)	
XPO-102J789	
Resource (5)	
0007459832	
5CEBME4AW055698	
HRSA28726	
SABDHRBKS	
SARC00694	

Inventory at the customer location is listed under a green house icon. All of the inventory on the technician's truck is listed under a yellow truck icon.

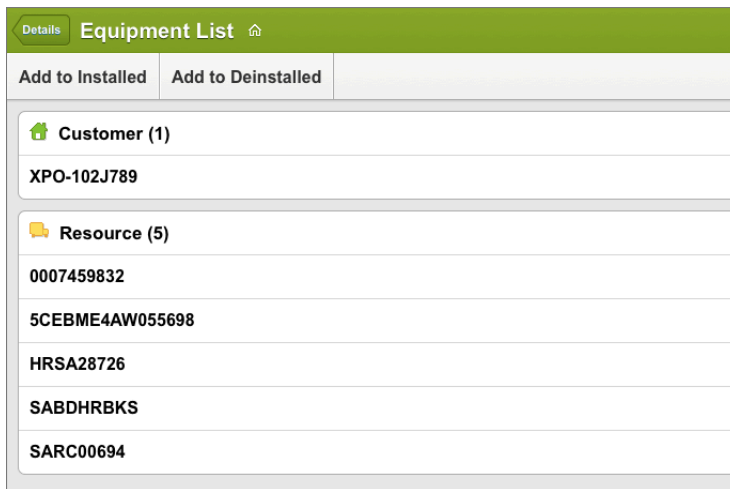
Inventories Equipment Details	
Hit History	
Serial number:	KTS10922
Inventory type:	Cable Video
Item Number:	1029-1920
RF-out:	yes

3. Click the serial number to display the **Equipment Details** screen shown above.

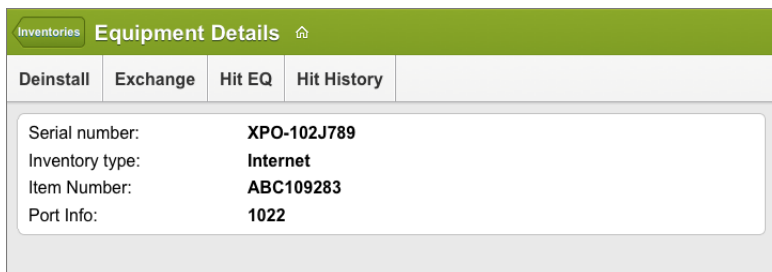
Adding, Exchanging, or Uninstalling Inventory

When you install or deinstall inventory, you move items from the resource pool (yours) to the customer pool and vice versa.

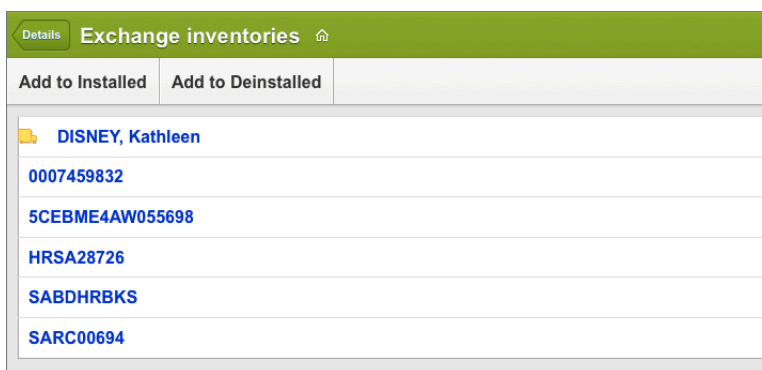
1. On the main screen, click the activity. The **Activity Details** screen displays.
2. Click the **Inventory** button. The **Equipment List** screen displays.



3. Click the serial number for the piece of inventory that you want to add, exchange, or uninstall. The **Equipment Details** screen updates to display information about that piece of inventory.



4. Click the **Add, Exchange, or Deinstall** button. If this is an exchange, the **Exchange inventories** screen displays. Click the serial number of the piece of inventory that you want to replace.



5. The screen updates to show the inventory installed at the customer's location as well as the inventory in the resource pool that you are carrying in your vehicle.

Details Equipment List 7 3:18:31	
Add to Installed	Add to Deinstalled
Installed (1) ^	
0007459832	
Deinstalled (1) ^	
XPO-102J789	
Resource (4) ^	
5CEBME4AW055698	
HRSA28726	
SABDHRBKS	
SARC00694	

Sending Information to a Piece of Inventory

When you install inventory, you must sometimes send certain information to it. For example, if the piece of inventory is a cable box, you might need to send the list of channels or you might send a test message to make sure that the connection is working.

To send an inventory request:

1. Mark the piece of equipment as installed in the Mobility interface. See **Adding, Exchanging, or Uninstalling Inventory** for details.
2. From the **Installed Equipment** list, click the serial number of the piece of inventory to which the information will be sent. (0007459832 in the example)

Details Equipment List	
Add to Installed	Add to Deinstalled
Installed (1)	
0007459832	
Deinstalled (1)	
XPO-102J789	

The **Equipment Details** screen displays.

Inventories Equipment Details 🏠	
Deinstall	Hit EQ
Hit History	
Serial number:	0007459832

3. Click the **Hit EQ** button. The Send Request window displays.

Send request	
Type * :	Hit equipment
Hit Type:	
Submit	Dismiss

4. In the **Type** field, select the type of request from the drop-down list.
5. In the **Hit Type** field, select the type of hit (request) from the drop-down list.
6. Click **Submit**. The screen refreshes with the request details.

Requests Request details 🏠	
Type:	Hit equipment
Hit Type:	Initialize

As the screen indicates, the initialize instructions will be sent to the piece of equipment whose serial number you identified in step 2.

Chapter
6

Working as Part of a Team

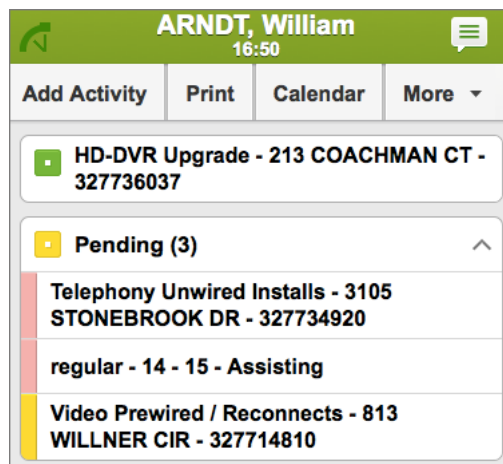
Teamwork is a feature that enables a mobile employee or group of mobile employees to assist each other either on a single job or on an on-going basis.

Some companies use teamwork to assign a trainee to work with a more experienced technician. Others use teamwork to assign a van to a technician.

Teamwork includes two roles:

- **Team Leader:**The person who is being assisted.
- **Assistant:**The person who is assisting the team leader.

If you are the assistant for a particular appointment, the time displays in your route as either “Assisting” or “Teamwork.”



If you are a Team Leader, the activity appears in your route as a regular appointment.

You must start and complete teamwork activities the same way that you start and complete regular activities.

Chapter
7

Ending your Day

Topics:

- **Deactivating the Route**
- **Logging Out**
- **Best Practices Checklist**
- **Working Offline**
- **Customizing the Interface**
- **Changing Your Password**
- **Glossary**

Before you end your day, you must deactivate your route and log out of ETAdirect.


Deactivating the Route

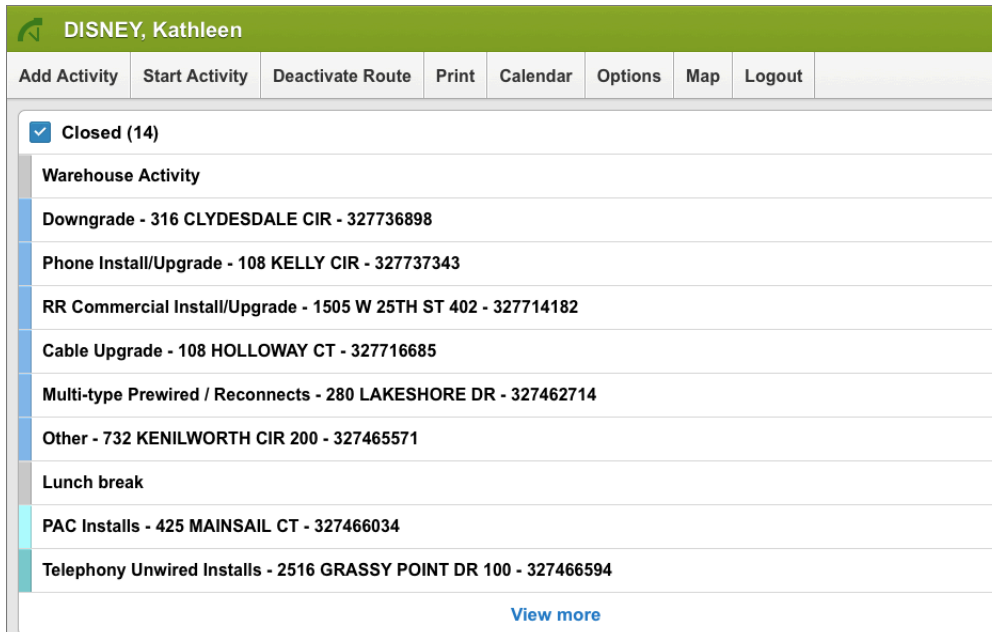
Before you deactivate, verify that all of your activities have been completed or cancelled. All jobs should be listed under the Closed section of the main screen as shown below.

At the end of the day, you must deactivate your route. This notifies dispatch that you are no longer available to take jobs.

To deactivate your route:

1. Click **Deactivate Route** on your home screen.
2. The **Deactivate Route** option displays only when all activities on your route have a status of either Completed or Not Done.

 **Note:** If the option is not displayed, verify that you have completed all of your activities



The screenshot shows the ETAdirect interface for user Kathleen Disney. At the top, there is a green header with a back arrow and the name "DISNEY, Kathleen". Below this is a navigation bar with buttons for "Add Activity", "Start Activity", "Deactivate Route", "Print", "Calendar", "Options", "Map", and "Logout". The main content area is titled "Closed (14)" with a checkmark icon. It lists several activities under the heading "Warehouse Activity":

- Downgrade - 316 CLYDESDALE CIR - 327736898
- Phone Install/Upgrade - 108 KELLY CIR - 327737343
- RR Commercial Install/Upgrade - 1505 W 25TH ST 402 - 327714182
- Cable Upgrade - 108 HOLLOWAY CT - 327716685
- Multi-type Prewired / Reconnects - 280 LAKESHORE DR - 327462714
- Other - 732 KENILWORTH CIR 200 - 327465571

Below these activities, there is a "Lunch break" entry and two more activities:

- PAC Installs - 425 MAINSAIL CT - 327466034
- Telephony Unwired Installs - 2516 GRASSY POINT DR 100 - 327466594

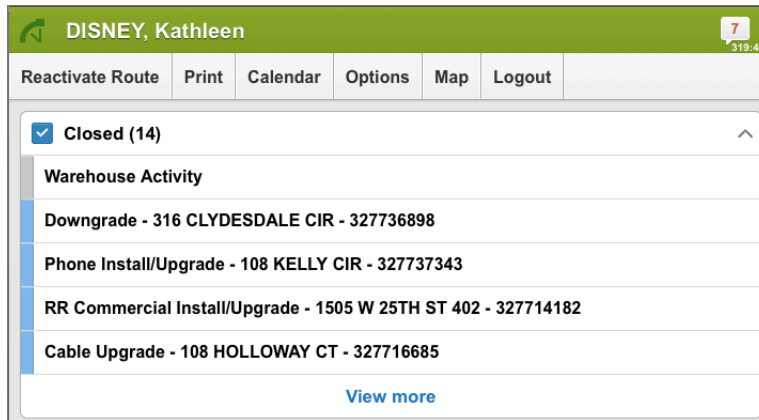
At the bottom of the list, there is a "View more" link.

- On the confirmation screen, click **Yes**.

Logging Out

To keep the information in ETAdirect secure, you must log out of the system when you are finished for the day.

To log out of ETAdirect, click the Logout button on your home screen.



Best Practices Checklist

ETAdirect works best when it is receiving accurate information. For best results and to make your day-to-day work run smoothly, follow these best practices:

Activate your route on time. This lets dispatch know that you are on the job and ready for work.

- Activating your Route or Queue

Start and stop your jobs when you actually start the work and end the work.

- **Starting an Activity**

If you forget to start a job, contact your dispatcher or supervisor and give them your actual start time so they can start the job for you and enter the actual time you started.

If you find that your job will take longer to complete than the duration assigned to it, add time to the job right away.

- **Adding Time to an Activity**

Follow your company's procedures for those times when you cannot complete the activity.

- **Suspending an Activity**
- **Marking an Activity as Not Done**
- **Rescheduling an Activity**

Add activities to designate time that is used for anything work related, even company meetings, lunch breaks, and stops for gas.

- **Adding an Internal Activity**

Deactivate your route at the end of day.

- **Deactivating the Route**

Logout when you are finished for the day.

- Logging Out

Working Offline

When you do not have network access, you can still record information through the mobile application. The Mobility module saves the information that you enter on your mobile device until you connect to a network again. At that point, the information is uploaded to ETAdirect.

Important: When you are not connected to a network, you do not receive updates to your route. You must contact dispatch if you want to find out about any changes to your route.

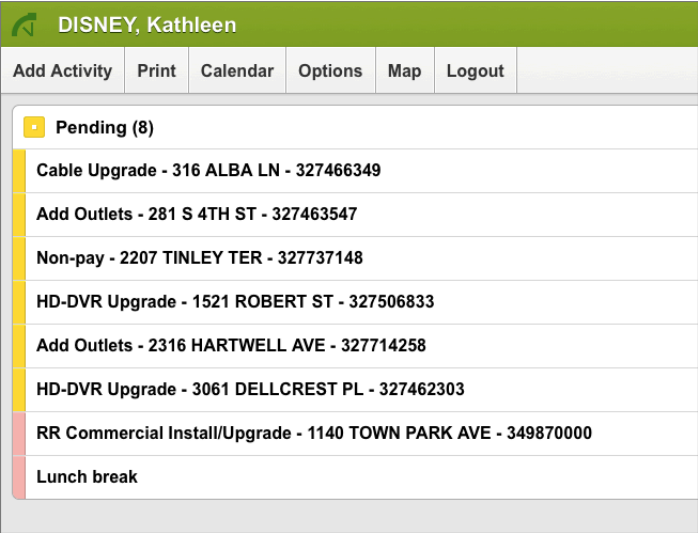
To tell whether or not you are connected to a network, check the upper right corner of the interface. If the word **offline** displays, you are not connected to a network. The mobile application is not sending or receiving information.

If the background behind the word offline is red, the Mobility module contains saved information that will be uploaded to ETAdirect the next time you connect to a network.

Customizing the Interface

You can change some of the display options to suit the way you work and like to view information. The options might differ depending on your company’s configuration and your permissions.

1. Click **Options** on your home screen.



The **User options** window displays.

The screenshot shows a 'User options' dialog box with a 'Change Password' section. The settings are as follows:

- Language: English
- Time Format: 12-hour
- Date Format: mm/dd/yy
- Number of activities per page: 5
- Number of inventory per page: 10
- Display forms mode: Classic mode

At the bottom of the dialog, there are two buttons: 'Dismiss' and 'Submit'.

2. Change the values as described below.

- **Language:** Select the language you would like to use
- **Time Format:** Select whether you want time to be in 12 hour or 24 hour mode. This affects the Start and End time of an activity.
- **Date Format:** Select the date format you want to use from the drop-down list.
- **Number of activities per page:** Enter the number of activities you want to see on each page.
- **Number of inventory per page:** Enter the number of inventory items you want to see on each page.
- **Display forms mode:** Choose the layout that you prefer. This setting controls the layout of the Activity Details screen and the Inventory Details screen.

The following modes are available:

- **Classic mode:** displays information in a single screen. The information is arranged vertically and you can swipe up and down to scroll through it.
 - **Multi-screen mode:** displays the information on multiple screens. Includes a scroll button so you roll horizontally through the display.
 - **Tile mode:** displays the information on a single screen. The information is arranged horizontally and you can swipe left and right to scroll through it.
- ⚠ **Important:** Before you can display information in Multi-screen mode or Tile mode, you must set the *End of column* marker in the Add/View Activity and Add/Details Inventory context layouts. If the marker is not set in both context layouts, the information will display in Classic mode, regardless of the selection you make here.

3. Click **Submit**.

Changing Your Password

You can change your password from your home screen under Options.

To change your password:

1. On the main screen, Click on **Options** on the strip menu that runs across your home page. The **User options** window displays.
2. Click **Change Password** at the top of the screen.

User options

Change Password

Language:

Time Format:

Date Format:

Number of activities per page:

Number of inventory per page:

Submit **Dismiss**

3. The Change Password screen displays.

Change password

Please change your password.

Old Password

New Password

Retype New Password

Submit **Dismiss**

4. Type your old password once and your new password twice. Make sure that your new password complies with your company password rules.
5. Click **Submit**.

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 55** 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 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.