



Technician Manager Portal

With this portal a manager may quickly and efficiently review the info available for service technicians. This info includes:

- Current working schedule
- Time Tracking data (optional)
- Current day schedule and tech position (optional)
- GPS tracking for today and previous days (optional)

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Required Setup

To activate the Time Tracking and GPS Mapping functions you must activate the options in the “Tech Tracking” tab of the “SO Config” tab available in the Enter Service Orders portal. See the [Mapping documentation](#) and [Tech Time Tracking documentation](#) for more details.

Tech Tracking

Edit Options and click on Update
* This page requires security level of 9 for Service Orders

Tech Time Tracking	Tech GPS Position Mapping
Use Tech Time Tracking? <input checked="" type="checkbox"/>	Capture Tech GPS Position? <input checked="" type="checkbox"/>
Create S/O Line Items for S/O Labor Cost? <input checked="" type="checkbox"/>	- Auto Update Interval <input type="text" value="Every 15 minutes"/>
- Service Code (To/From Time) <input type="text" value="LABORCOST (Labor Cost)"/>	Store GPS Tracking Data? <input checked="" type="checkbox"/>
- Skip S/O Labor Lines on Invoice? <input checked="" type="checkbox"/>	Map Icon Images
Track Multiple Techs per S/O? <input checked="" type="checkbox"/>	- Tech - On-Site <input type="text" value="techicon.png"/>
Time Tracking Codes	- Tech - Other Status <input type="text" value="truckicon.png"/>
Code for Service Order Time <input type="text" value="Service Work"/>	- S/O - Normal <input type="text" value="pin_green32.png"/>
Allow Edit of S/O Time? <input checked="" type="checkbox"/>	- S/O - Priority 1 <input type="text" value="pin_red32.png"/>
Other Event 1 Code <input type="text" value="Clock In"/>	- S/O - Late <input type="text" value="warning32.png"/>
- Event 1 Image File <input type="text" value="clock_run.png"/>	- S/O - Unassigned <input type="text" value="unknown32.png"/>
Other Event 2 Code <input type="text" value="Travel"/>	MapQuest AppKey <input type="text" value="Dq8x2Ss01Q6RK9J8S4F1RGKgwBm18b"/>
- Event 2 Image File <input type="text" value="techvan.png"/>	(Required for map display - set up in NL Control Record)
Other Event 3 Code <input type="text" value="Meal Break"/>	<input type="button" value="Update"/>
- Event 3 Image File <input type="text" value="meal.png"/>	
Other Event 4 Code <input type="text" value="Personal Leave"/>	
- Event 4 Image File <input type="text" value="calendar.png"/>	
Other Event 5 Code <input type="text" value="Clock Out"/>	
- Event 5 Image File <input type="text" value="clock_stop.png"/>	
Other Event 6 Code <input type="text"/>	

Accessing the Tech Manager Portal

You may access this portal from the QuickScreens menu. Select the “SV – Tech Manager Portal” icon from the menu.

Technician List

The screenshot shows the 'SV - Tech Manager Portal' interface. On the left is the 'Tech List' with a table of technicians. On the right is the 'Tech Info' section for the selected technician, Bill Smith.

Tech List Table:

Tech ID	Name	Phone	E
AAA	AAA	334-749-5555	bill
BONNIE	AAA	334-749-5555	bill
Bill	Bill Smith	334-749-5555	bill
FIVE	FIVE	334-749-5555	bill
FOUR	FOUR	334-749-5555	bill
Harold	Harold Oldman	334-749-5555	bill
Jane	Jane Smith	334-749-1234	
Joe	Joe Albrecht	334-821-8246 x 2456	joe
LMTEST	LM TEST	334-749-5555	bill
ONE	One	334-749-5555	bill
Sally	Sally Susan	334-749-5555	bill
Scott	Scott Hillyer	334-887-3859	
TECH1	Tech 1	334-749-5555	
TECH2	Tech 2	334-749-5555	
TECH3	Tech 3	334-749-5555	
THREE	THREE	334-749-5555	bill
TWO	TWO	334-749-5555	bill
Tom	Tom Brown	334-749-5555	bill


Tech Info for Bill Smith:

General | Time Tracking | SO Mapping | GPS Tracking

Bill Smith

Technician ID: Bill
Name: Bill Smith
Active? Y
Location:
Phone: 334-749-5555
Pager: 555-8765

All Equip? Y
All Dispatch Seq?
All Territories? Y
Territories: ALA GA MI



Work Schedule for Bill Smith:

Day	Working?	Start	End
Monday	Y	800	1700
Tuesday	Y	800	1700
Wednesday	Y	800	1700
Thursday	Y	800	1700
Friday	Y	800	1700
Saturday	Y	800	1700
Sunday	Y	800	1700

Scheduled Exceptions:

Date	From	To	Type	Comment
10/13/16	800	1700	Vacation	Family trip

Total Records: 18

When you access the Tech Manager portal you will see a list of technicians. Click on a technician to display the Tech Info view to the right of the list.

General Info Tab

The General Info tab shows basic info for the technician:

- **Info from Tech record**

The top portion of the screen shows info defined in the technician record (SV-07-10).

- **Image** - To display an image of the technician in this view you may place a jpg picture file in the NetLink images directory that has the name *techid.jpg*. In the example above the tech ID is "Bill" and the image file name is "Bill.jpg". If an image does not exist for the tech this portion of the view will be blank.

- **Work Schedule**

The middle portion of the screen shows the normal working hours for the technician as defined in the Scheduler Calendar (accessed from field 9 in SV-07-10).

- **Scheduled Exceptions**


The lower portion of the screen shows any scheduled exceptions that have been entered in the Scheduler Calendar.

Tech Info >

General | Time Tracking | SO Mapping | GPS Tracking

Bill Smith

Technician ID: Bill **All Equip?** Y
Name: Bill Smith **All Dispatch Seq?**
Active? Y **All Territories?** Y
Location: **Territories:** ALA GA MI
Phone: 334-749-5555
Pager: 555-8765



Work Schedule for Bill Smith:

Day	Working?	Start	End
Monday	Y	800	1700
Tuesday	Y	800	1700
Wednesday	Y	800	1700
Thursday	Y	800	1700
Friday	Y	800	1700
Saturday	Y	800	1700
Sunday	Y	800	1700

Scheduled Exceptions:

Date	From	To	Type	Comment
10/13/16	800	1700	Vacation	Family trip

Time Tracking Tab

The Time Tracking tab shows the Time Tracking portal that the technician uses to record time events during the day. When you access this tab you will see the Time Tracking info for the current date, but you may change the date to view other days. See the “Mobile Technician – Time Tracking” documentation for more information on this portal.

Please note that you may make changes to the events shown, but no GPS tracking info will be updated when you edit via the Tech Manager portal.

The screenshot displays the 'Technician Time Reporting - Bill' interface. It features three main sections: 'Log an Event Starting Time', 'Logged Event List', and 'Calendar Display'.

Log an Event Starting Time: Includes a date field set to '09/12/16' and a time field set to '905'. Below are buttons for 'Clock In', 'Travel', 'Meal Break', 'Personal Leave', and 'Clock Out'.

Logged Event List: A table with columns: DATE, START, END, REFERENCE, LAPSED TIME, and S/C. It lists seven events for 09/12/16.

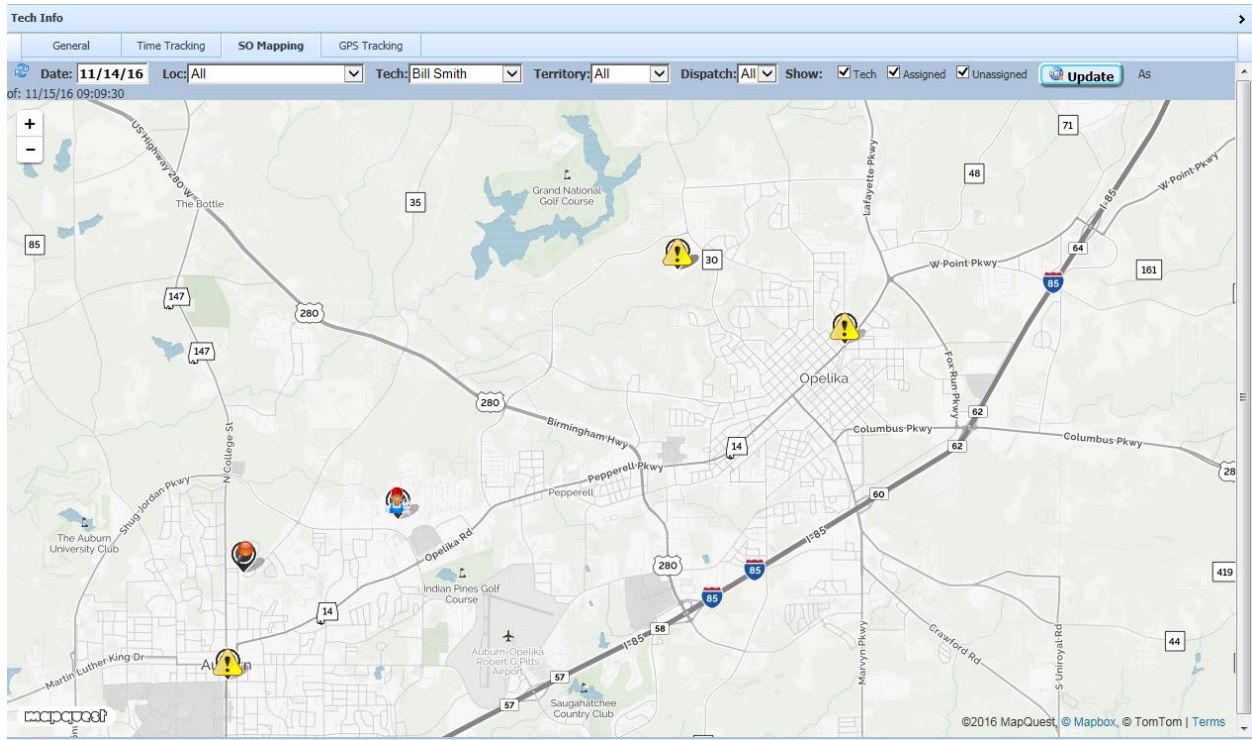
DATE	START	END	REFERENCE	LAPSED TIME	S/C
09/12/16	800	815	Clock In	.25	
09/12/16	815	1200	Travel	3.75	
09/12/16	1200	1300	Meal Break	1.00	
09/12/16	1300	1400	Personal Leave	1.00	
09/12/16	1400	1638	Service Work	2.63	00100
09/12/16	1638	1715	Travel	.62	
09/12/16	1715	0	Clock Out	.00	

Summary: Total Records: 7, Total Hours: 9.25. Legend: Clock In .25 | Meal Break 1.00 | Personal Leave 1.00 | Service Work 2.63 | Travel 4.37

Calendar Display: A vertical calendar for 12 Sep 2016 showing time slots from 07:00 to 18:00. Events are color-coded: Clock In (08:00-08:15), Travel (08:15-12:00), Meal Break (12:00-13:00), Personal Leave (13:00-14:00), Service Work (14:00-16:38), and Travel (16:38-17:15).

SO Mapping Tab

The SO Mapping Tab shows a map with icons for the service orders assigned to the technician on the current date and an icon showing the last recorded position of the technician. See the “Service Order Scheduling – Mapping Option” documentation for more information on this map and the requirements to use MapQuest mapping.

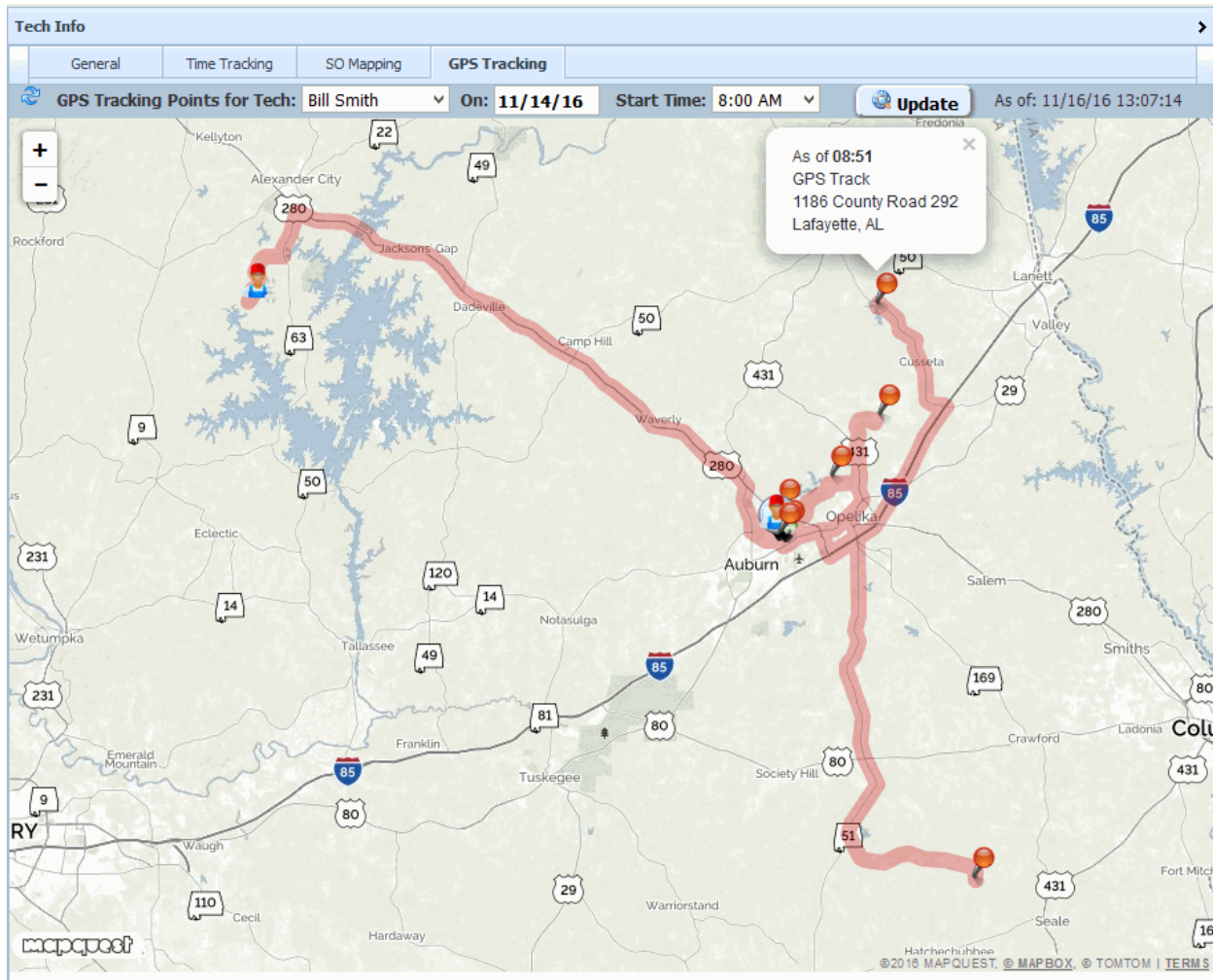


You may click on a service order icon to display details about the service order. You may also click on the technician icon to view the street address for the position indicated.

GPS Tracking Tab

The GPS Tracking Tab shows a map of all GPS positions recorded for a technician during a day. You must have activated the “Store GPS Tracking Data” option in the Tech Tracking configuration in order to use this feature.

When you access the tab the map will show positions for the current date. The route is sequenced by the time stamp for each GPS position record. You may view history for other dates by changing the date field and pressing the Update button. You may also enter select a Starting Time to include only positions from that time forward.



You may click on any icon point on the route to see the time and address for that point.

NOTE:

MapQuest limits a route to 50 data points, so the map will show only the first 50 GPS positions for a date. You may use the Start Time option to skip earlier records if needed.

Technical Notes

Here are the NetLink requests used in the Tech Manager portal:

- QSSOTECHMGR – displays the list of techs and provides the layout for the list and view pane
- QSSOTECHVW – displays the tabs for tech info and shows the General tab info
- MTTECHTIMETRK – displays the Time Tracking portal
- QSSOTECHMAP – displays the SO Map with service orders and technician location
- QSSOTECHMAPGPS – displays the map with GPS tracking positions shown as a route