

## SETTING UP A NEW TECHNICIAN

### CREATE EMPLOYEE RECORD

1. Under Administrative > Employees, click on + to add new employee.

	Last Name	First Name	Roles	Admin User	Active
	B	Rebecca	Technician, Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	B	Mike	Technician	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Brown	Bobby	Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Enter Employee Name
3. Select Default Location
  - a. SW will look at the Default Location when Reviewing a work order to determine the location of parts used on the work order.
4. Select Job Skills
5. Click on Save

**Employee**

First Name:

Middle Initial:

Last Name:

Spouse Name:

Children:

Education Level:

Employee Number:

Payroll Number:

Default Site:

Default Location:

Home Page:

Equipment:

Job Skills:

Pay Type:

5

## ENTER ADDRESS FOR TECHNICIAN

**\*The Schedulers and Router WILL NOT SHOW the technician until an address is entered. \***

- Click on the '+' in the address panel.

The screenshot shows the technician profile page for 'Tech, Super'. The 'Addresses' section is highlighted with a yellow box, and a yellow circle with the number '6' points to the '+' icon in the 'Addresses' table header. The table has columns for Address Type, Name, Address, City, State/Province, Postal Code, and Active.

- Select Address Type of Primary
- Enter Address Name – Home
- Enter Address
- Validate Address
- Save

**\*An alternate starting address can be entered after entering their Primary address. Select Address Type of "Tech Starting" then continue with steps 8-11 above. If a Tech Starting address is entered, the router uses this as the starting point, otherwise, the router uses the Primary address as the starting point.\***

The screenshot shows the technician profile page for 'Tech, Super'. The 'Addresses' section is expanded, showing fields for Address Type (Primary), Address Name (Work), Address 1 (1010 N. University Par), City (Waco), State/Province (Texas), and Postal Code (76707). A yellow circle with the number '11' points to the 'Validate Address' button. A yellow circle with the number '10' points to the 'Validate Address' button.

## CREATE USERNAME AND PASSWORD AND DEFINE ROLE

12. Click on the blue arrow in the Access Control panel.

The screenshot shows a web application interface with several panels. The 'Access Control' panel is highlighted with a blue border and a blue arrow pointing to a blue arrow icon in the top right corner of the panel, with the number '12' next to it. The 'Access Control' panel contains a table with columns: Username, Roles, and Devices. The 'Username' column contains the text 'No Username'. Other panels include 'Employee Search' (with search criteria 'Tech, Super'), 'Employee' (table with columns: Payroll ID, Employee, Number, Status), 'Addresses' (table with columns: Address Type, Name, Address, City, State/Province, Postal Code, Active), 'Drivers Info' (table with columns: Drivers License #, State, Expiration Date), 'Employee Dates' (table with columns: Hire Date, Termination Date, Birth Date, Work Eligibility Date, Employment Agreement Date, Criminal History Date, Background Check Date, Wedding Anniversary Date), 'Tasks' (with start/end dates and search options), 'Contact' (table with columns: Contact Type, Contact Info, Description, Active), 'Employee Time Clock', 'Employee Time Off', 'Schedule Templates', 'Pay Rates' (table with columns: Position, Pay Percentage, Hourly Rate, Default), and 'Attachments' (table with columns: Name, Type, Active).

13. Enter a username.

- a. *The username and password may show your username and password if you have auto-fill turned on in Chrome. If it does, just click on the box. The outline will show in blue and you can backspace to remove your username and enter the new one.*

The screenshot shows a close-up of the 'Access Control' panel. The 'User Name:' label is followed by a text input field containing the text 'rbaker'. A 'Pend' button is visible in the top right corner of the panel.

14. Click the "Check" box to confirm that the username is not already in use.
15. Enter a password, following the password requirements.
16. Confirm the password.
17. Click in the "Roles" box and select "Technician" from the list.
18. Click on "Save".

Access Control

User Name:  13 18 14

Password:  15

Confirm Password:  16

Password Requirements:

- At least 6 characters long
- One or more lowercase letters ('a'-'z')
- One or more upper case letters ('A'-'Z')
- One or more digit ('0'-'9')
- One or more special non letter or digit character (eg ! @ : # ; \$ % , ^ \* )
- May not contain ampersand character ( & )

Roles:  17

Devices:

Device ID	Active

## CREATE SCHEDULE TEMPLATE TO ADD DAILY SCHEDULE AVAILABILITY

**\*The Schedule Template is the foundation on which the Daily Schedule is built. These are the general rules by which availability is calculated. To change availability on a day to day basis go to Routing Setup. \***

19. Click on the blue arrow on the Schedule Templates panel

Employee Time Clock

Employee Time Off

Schedule Templates 19

20. Click on the '+' to add a new template.

Schedule Templates

<input type="button" value="+"/>	Days	Zone	AM Hours	PM Hours	Rank	Job Skills	Active	Start Time	End Time (Routing)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Ac"/>	<input type="text"/>	<input type="text"/>

Search  No items to display

21. Select the technician that was just created.

22. Select the zone in which the Tech will be working.

23. Add AM and PM hours of availability and adjust days of the week as necessary.

24. Save.

Schedule Templates Save 24

Tech/Route: Tech, Super 21

Zone: 1 - Waco 22

Start Time: 08:00 AM

End Time (Routing): 06:00 PM

Rank: 1

AM Hours: 4

PM Hours: 4 23

Active:

Monday:   
 Tuesday:   
 Wednesday:   
 Thursday:   
 Friday:   
 Saturday AM:   
 Saturday PM:   
 Sunday:

Recalculate Next 35 Days

Note: Recalculate will clear out all schedule records for the above employee only and set new values based on the template, handling multiple zones with different workdays.

ID:0 Created: Updated:

25. Click on "Recalculate Next 35 Days" button. This will add the schedule availability to the Daily Schedule.

Schedule Templates Save Close

Tech/Route: Tech, Super

Zone: 1 - Waco

Start Time: 08:00 AM

End Time (Routing): 06:00 PM

Rank: 1

AM Hours: 4

PM Hours: 4

Active:

Monday:   
 Tuesday:   
 Wednesday:   
 Thursday:   
 Friday:   
 Saturday AM:   
 Saturday PM:   
 Sunday:

Recalculate Next 35 Days 25

Note: Recalculate will clear out all schedule records for the above employee only and set new values based on the template, handling multiple zones with different workdays.

Your technician will now show availability in the Simple and Routing Schedulers.