

corrigo[®]

v.t., *Latin*, to set right; to correct



User's Guide

Dispatch Board and Calendar View

Release 5.2

CorrigoNet[™]
CorrigoConnect[™]

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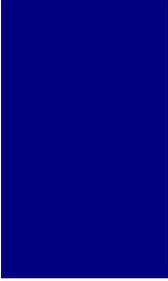
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Using the Dispatch Board and Calendar View

Overview

The Dispatch Board and its companion Calendar View are basic tools to help you assign, schedule, and monitor work orders from creation to completion. These closely linked, interactive boards give you a bird's-eye view of work orders in the system, including their updated status as reported from the field. They also offer shortcuts to edit, assign, schedule, and reschedule work as required.

Dispatch Board: 142 Active Work Orders | Show Calendar |

Refresh every: 5 minutes | Refresh Now | Property: 200 Arlington Plaza | Create Request |

Show Work Scheduled: Anytime/Unscheduled | Status Filter: Off | Type Filter: Off | Specialty Filter: Off

Status	Type	WO#	Location	Work Description	Scheduled Start	Assign	Prt	Acc/Appt	Due by date
New	R	APLC0060	1019	Living / Di	16:34 05/		2	PTE	12:00 12/
New	R	APLC0061	1019	Multi-item:	N/A		2	PTE	12:00 12/
New	B	APLC0061	1019	Living / Di	14:00 03/		2	PTE	14:00 03/
Needs Attn:	B	APLC0061	1019	Garage:Wa	12:17 05/	Bill Baile	2	PTE	14:00 03/
Open	B	APLC0061	1019	Kitchen:Di	12:00 04/	Joseph, I	2	PTE	14:00 04/
Open: In Pro	R	APLC0062	518	Bedrooms:	15:54 03/	Bill Baile	2	PTE	12:00 12/
Open:Pause	R	APLC0063	309	Bathrooms	12:00 04/	Marotta,	2	PTE	15:00 12/
On Hold: Wa	R	APLC0064	11/11/10	Kitchen:Ra	08:36 03/	Alexand	3	PTE	16:00 05/
Open	B	APLC0066	412	:Alarm - Ei	13:00 03/	Sam Spa	2	N/A	08:00 03/

Calendar: 7 Unscheduled Work Orders | Show List |

Refresh every: 5 minutes | Refresh Now | Property: 200 Arlington Plaza | Create Request |

Type Filter: Off | Specialty Filter: Off

Status	Type	WO#	Location	Work Description	Scheduled Start	Assign	Prt	Acc/Appt	Due by date
New		APLC0061	1019	Multi-item:	N/A		2	PTE	12:00 12/
New	R	APLC0074	1019	Kitchen:Ra	N/A		2	PTE	15:00 03/
New	Bas	APLC0084	11/1001	Bathrooms	N/A		2	Call Fir	17:00 04/
New	R	APLC0089	1013	:Alarm - Ei	N/A	Sam Cler	1	PTE	14:00 04/
New	R	APLC0100	206	Kitchen:Di	N/A	Phil Marl	2	Call Fir	08:00 05/

Current Calendar View: Week View

March, 2006 | Previous Week | Next Week |

	Sun, Mar 26	Mon, Mar 27	Tue, Mar 28	Wed, Mar 29	Thu, Mar 30	Fri, Mar 31	Sat, Mar 31
8:00 AM				APLC0075.01	APLC0077.04	APLC0079.03	
9:00 AM					APLC0077.04		
10:00 AM		APLC0042	APLC0042	APLC0042	APLC0073.04		
11:00 AM				APLC0073.04			
12:00 PM						APLC0034	APLC0034

The Dispatch Board and Calendar View remain open independently of other pages in the system. They are designed to sit on the desktop and be available throughout the day for you to monitor and actively

manage the work order process in real time. They function as a kind of “dynamic white-board” that can be monitored and edited as needed.

As work orders are created, they appear on the Dispatch Board. As they are processed and their status changes, the colored cell in the Status column changes. When a work order is completed it drops off the Dispatch Board.

Calendar View is a scheduling tool that lets you see the work orders from the Dispatch Board in time slots and in the context of your technicians’ workloads. Completed work orders remain on the Calendar for later reference.

Font and Color Conventions

Both the Dispatch Board and Calendar use color-coded font styles to identify different types of work orders. The following table details the color and font codes.

Font Style	Description
Regular	Current, on-schedule
Bold	Overdue (exceeded Due By date)
Red	Emergency
Bold Red	Overdue emergency (exceeded Due By date)

In addition, the Dispatch Board’s Status column and the Calendar View’s scheduling slots are color-coded for quick reference. The following table indicates the color codes.

Status Color	Description
Green	New
Red	Needs Attention
Cream	Open
Orange	Open: In Progress
Blue	Open: Paused
White	Open: On Hold

New	R	▼ APLC0061
New	B	▼ APLC0061.0
Needs Attn: N	B	▼ APLC0061.0
Open	B	▼ APLC0061.0
Open: In Pro	R	▼ APLC0062
Open: Paused	R	▼ APLC0063
On Hold: Wait	R	▼ APLC0064
Open	B	▼ APLC0066
Open: In Pro	B	▼ APLC0068.01

Using the Dispatch Board

The Dispatch Board remains open independent of other activities in the system.

To access the Dispatch Board:

1. Click the Work Orders tab. The Work Orders menu opens.
2. Choose Dispatch Board from the Work Orders menu. The Dispatch Board opens in a separate window.

All new and in-process work orders appear on the Dispatch Board, unless you filter the list to show a subset. Once a work order is completed (or canceled), it no longer appears on the Dispatch Board.

The Dispatch Board is arranged in columns and rows. Each row contains the pertinent information for one work order.

Here is a list of the default columns found on the Dispatch Board. The columns can be added/edited/replaced/deleted through the Dispatch Board settings (see Customizing the Dispatch Board below.)

Column Heading	Display	Description
Status	Color, Text	Shows Status of work order by description and color coding
To Do	Graphic	Colored circle (green, yellow, red) indicates status of Dispatcher To Do
Type	Letter	B – Basic, R – Request, P – Scheduled
WO #	Alphanumeric	Coded to location and sequence
Location	Text	Description of site location of work order
Item	Text	Asset location of work order
Description	Text	One-line description of work order task
Expected Start Time	Date	Scheduled start time, displays NA if not scheduled
Assign	Name	Displays assigned tech, blank if unassigned
Prt	Number	Priority (1 – Emergency, 2 – Regular, 3 – Low)
Created	Date	Date on which the work order was created

Tips:

- ✓ The work order status indicated by the color-coded cell in the far left column of the board changes automatically as team members interact with the system and pick up, process, and complete work orders
- ✓ To view the Work Order Details page for any work order, simply click its WO# in the Dispatch Board.

Filtering the Dispatch Board View

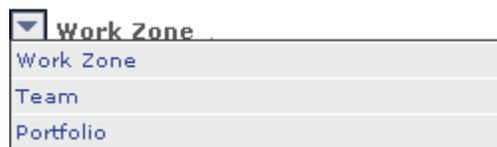
The Dispatch Board displays as much or as little information as you want to see. You have several options for focusing the scope of the displayed information at different levels.

Note:

If you set up filters on the Dispatch Board, your board will keep the same settings the next time you open the Dispatch Board.

To change scope:

1. Click the arrow  near the top center of the board to the right of the Refresh Now button. A pull-down list opens.



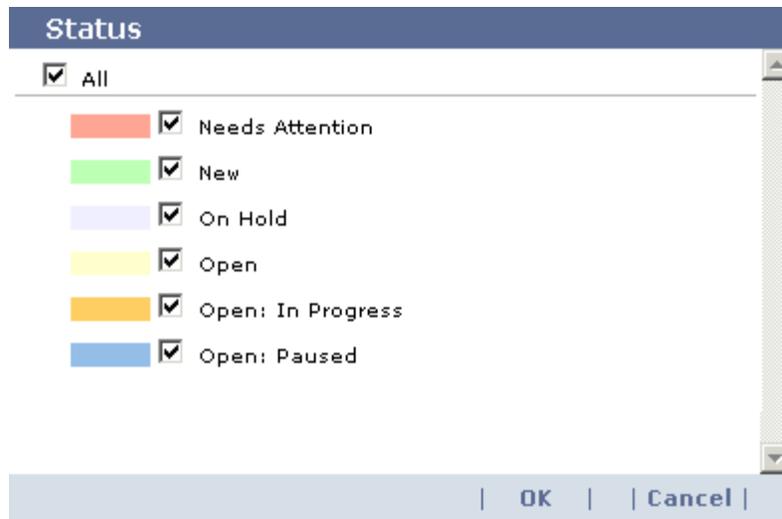
2. Click the item in the list by which you want to focus your information. This refreshes the pull-down box further to the right with the appropriate choices.
3. Pull down the box on the upper right of the page, and choose an item.



The list of work orders is updated to reflect the filtering you applied.

To focus by work order status:

1. Click the arrow  to the left of Work Order Status Filter. The Work Order Status Filter dialog opens.



2. Check the boxes for the statuses of work orders you want to see. Clear the check boxes for the statuses of work orders you don't want to see. If you check All, you will see all new and in-process work orders.
3. Click OK.

To focus by work order type:

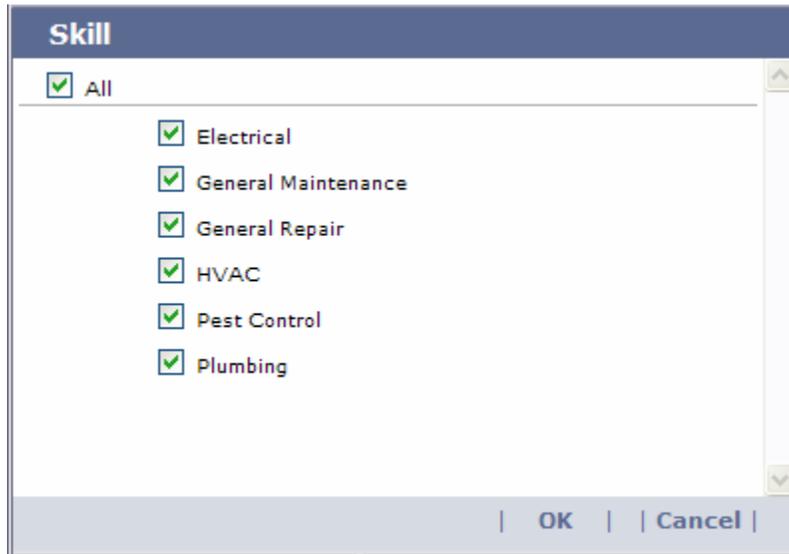
1. Click the arrow  to the left of Work Order Type Filter. The Type Filter dialog opens.



2. Check the boxes for the types of work orders you want to see. Clear the check boxes for the statuses of work orders you don't want to see. If you check All, you will see all work order types.
3. Click OK.

To focus by specialty:

1. Click the arrow  to the left of Specialty Filter. The Specialty Filter dialog opens.

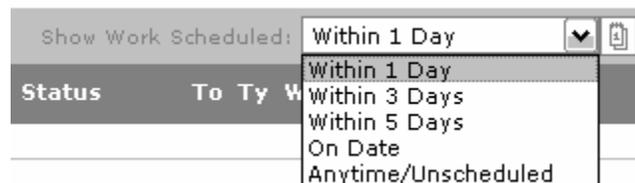


2. Check the boxes for the specialties you want to see. If you remove the check beside All, all the checkmarks will be removed for all the specialties. You can then select the specific specialties to display. To add all the specialties back in, place a check beside All.
3. Click OK.

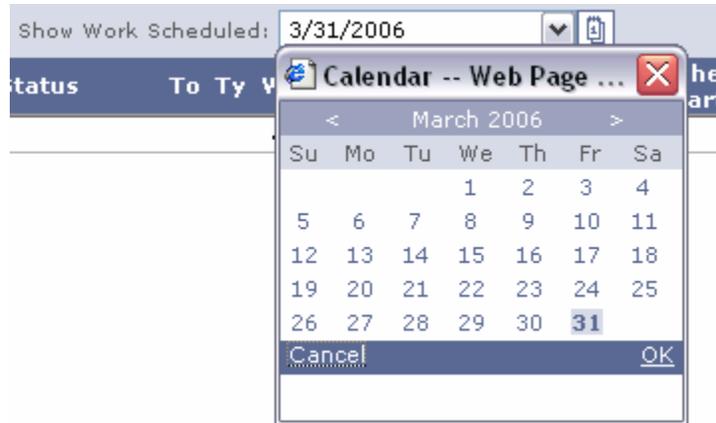
To focus by time frame:

This filter allows you to view work orders that have appointments for a certain time frame. When the list populates, it will filter by appointments and all overdue work orders. This means if you have overdue work orders on the Dispatch Board, they will also appear in the filter, even if there is not an appointment for that work order.

1. Click the button on the pull-down box next to "Show Work Scheduled:".



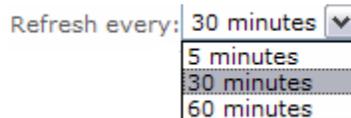
2. Choose the time frame from the list for which you want to view work orders. The list automatically updates.
3. If you are looking for work orders on a specific date, choose On Date from the list or click on the Date icon  to the right of the drop-down menu. The calendar will open and you can select the appropriate date.



- To view all work orders, regardless of appointments, choose Anytime/Unscheduled from the list.

To refresh the Dispatch Board:

To refresh the Dispatch Board at any time and update it with the latest data, click the Refresh Now button at the top of the page. You can also set the Dispatch Board to automatically refresh every 5, 30 or 60 minutes.



Sorting the Dispatch Board

You can sort the information displayed on the Dispatch Board according to any of the column headings.

To change the sort order of the Dispatch Board:

- Click one of the column headings. A small triangle appears next to the column heading ▲, and the displayed records are sorted by that column's contents.

Status	Type	WO#	Location	Work Description	Scheduled Start	Assign	Prt	Acc/Appnt	Due date
On Hold: Wa	R	APLC0064	1002	Kitchen:Ran	08:36 03/31	Alexandr	3	PTE	16:00
Open	TI#	APLC0072	1003	:1003:Pain	00:00 04	Sam Spe	2	PTE	08:00
New	B	APLC0032	1005	Laundry A	12:30 04	Volpe, A	2	Appoin	17:00
New	B	APLC0073	1013	:1013:Pain	08:00 03		2	PTE	00:00
On Hold: De	B	APLC0073	1013	:1013:Clea	08:00 03		2	PTE	00:00
On Hold: De	B	APLC0073	1013	:1013:Fina	11:00 03		2	PTE	00:00
New	R	APLC0089	1013	:Alarm - E	N/A	Sam Cle	1	PTE	14:00
New	R	APLC0075	1014	:Mildew Is	16:27 05		1	PTE	17:00
On Hold: Wa	R	APLC0088	1014	Bathrooms	12:00 04	Phil Mar	2	Appoin	16:00

- Click the column heading again to toggle the sort order between ascending and descending. To sort by another column heading, simply click that heading.

Making Changes with Shortcut Arrows

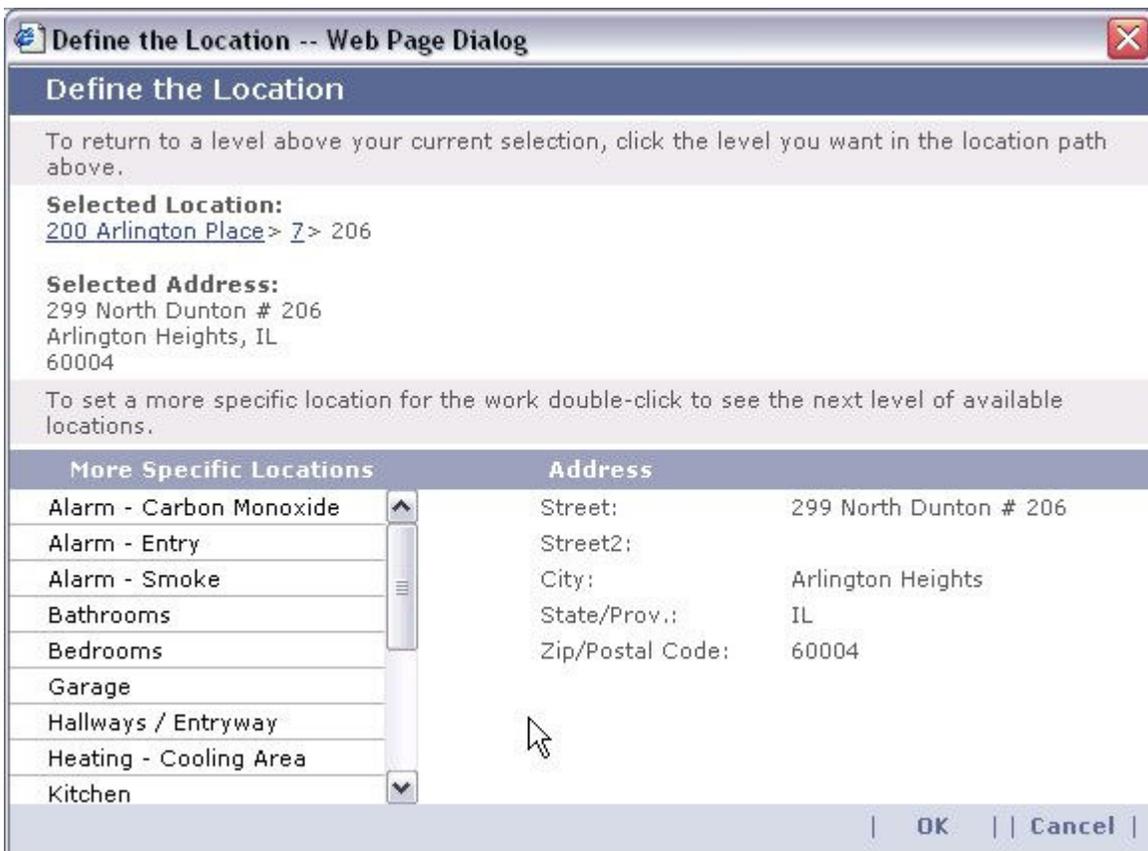
There are two ways to edit the work orders displayed in the Dispatch Board without leaving the Dispatch Board and navigating to the Work Order Details page.

- Use the arrows on each work order line to edit the adjacent detail; or
- Use the arrow to the left of the Work Order number to open the View/Edit Work Order dialog box.

In the Dispatch Board, the arrows indicate fields that can be edited.

To change the location:

- Click the arrow  on the left side of the Location field. Actually, clicking anywhere in the cell works. The Define the Location dialog opens. This is like the page in the Service Request Creation wizard where you specify the location, the asset to be worked on, and the problem.



Define the Location

To return to a level above your current selection, click the level you want in the location path above.

Selected Location:
200 Arlington Place > Z > 206

Selected Address:
299 North Dunton # 206
Arlington Heights, IL
60004

To set a more specific location for the work double-click to see the next level of available locations.

More Specific Locations	Address
Alarm - Carbon Monoxide	Street: 299 North Dunton # 206
Alarm - Entry	Street2:
Alarm - Smoke	City: Arlington Heights
Bathrooms	State/Prov.: IL
Bedrooms	Zip/Postal Code: 60004
Garage	
Hallways / Entryway	
Heating - Cooling Area	
Kitchen	

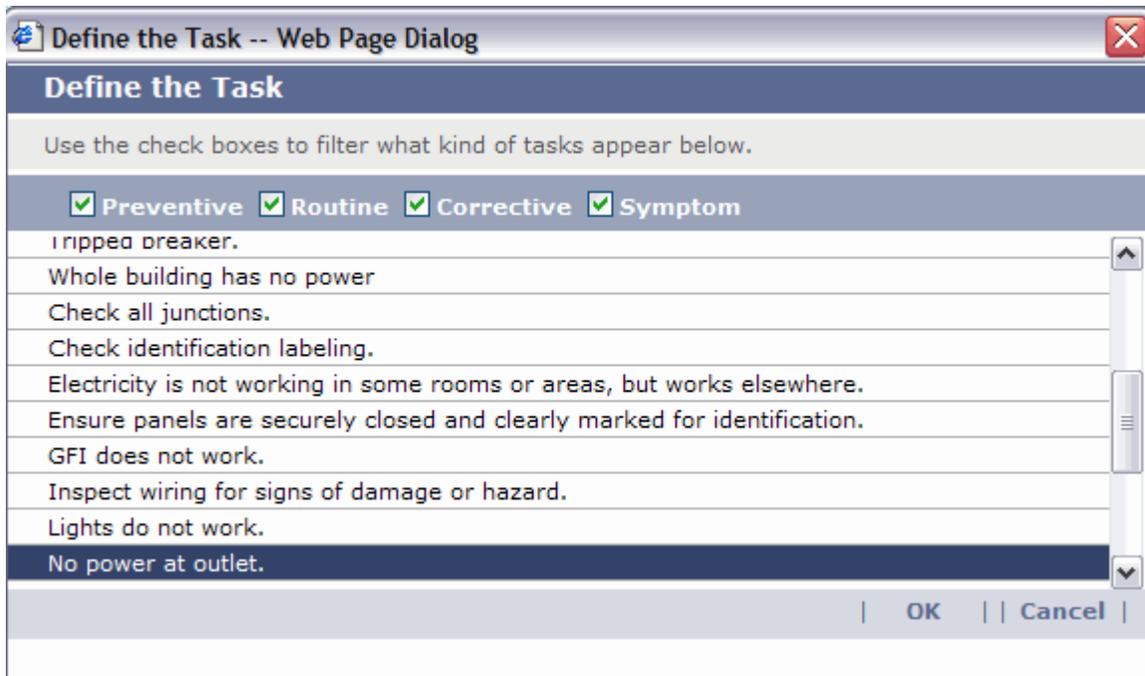
| OK | | Cancel |

- The Selected Location label at the top displays the hierarchical path to the asset. Click any of the links in this path to back up to that point and repopulate the lists below accordingly.

- The More Specific Locations area on the left side of the dialog contains a list of locations or assets, depending on the path in the Selected Location label. As you navigate deeper into a location, this list becomes more specific. Double-clicking an item updates the Selected Location path. For the Dispatch Board's Location field, it is usually preferable to drill down only to the unit level, rather than to the specific asset being serviced.
2. When finished, click OK at the bottom of the box.

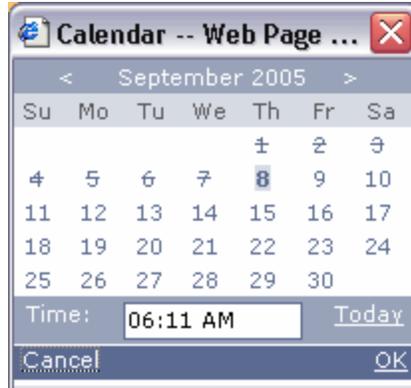
To edit the task and work description:

1. Click the arrow  to the left of the Description field. This will open the Define the Task dialog.
2. Scroll through the list to find the specific task for the work order. You can also filter by the types of tasks by clicking the check boxes for each type.



To change the expected start time or appointment:

1. Click the arrow  to the left of or anywhere in the cell where you want to edit the start or appointment time. A calendar opens.



2. Click Today if you want to enter today's date, or click another date on the calendar. Click the arrows on either side of the month to change to the next month.
3. Enter a new time by selecting the time that is currently displayed and typing over it.
4. Click OK.

To reassign the work order to another technician:

1. Click the arrow  or anywhere in the cell where you want to change the assigned technician. A list of personnel appears.

▼ APLC0035	▼ 620	▼ N/A	▼ Butuk	▼ 2	18:09 12/05
▼ APLC0036	▼ Lighting	▼ 16:00 03/	▼ Bill R	▼ 2	18:10 12/05
▼ APLC0037	▼ 309	▼ N/A	Unassigned		12/05
▼ APLC0038	▼ 413	▼ N/A	Show All		12/05
▼ APLC0039	▼ 11	▼ N/A	Alexandra, Laukhina		12/06
▼ APLC0040	▼ Doors	▼ N/A	Bill Bailey		12/06
▼ APLC0041	▼ Lighting	▼ 10:00 03/	Butuk, Janet		12/06
▼ APLC0042	▼ Lighting	▼ 10:00 03/		▼ 2	08:28 12/06

2. Select one of the users in the list. Alternatively, select Show All to open the Assign the Work dialog.

Assign the Work Order

Primary Responsibility

Filter the available User in the Assign To field below by

Team:

Specialty:

Assign To:

User	Last Action	WO#
-- Unassigned --		
Alexandra, Laukhina		10
Bill Bailey	WO Item Added 15:33 04/19	9
Calderon, Vanessa	Completed 10:58 04/05	6
masha, khokhlova	WO Item Added 05:04 03/03	3
Phil Marlowe	Assignment Changed 11:09 04/2	12

Additional User (optional)

Filter the available User in the field below by

Team:

Specialty:

Available User

- Alexandra, Laukhina
- Bill Bailey
- Calderon, Vanessa
- masha, khokhlova
- Phil Marlowe
- Sasha

| **Add** |

| **Delete** |

Assigned User

|

3. If you selected Show All, click the Team pull-down and select the team to which the user you want to assign belongs. The User field updates with employees who belong to the selected team. You can also click the Specialty pull-down and make a selection.
4. Select the user who is to be primarily responsible for the work order.
5. If desired, add an additional user to the work order by making team and specialty selections in the Additional User area. Select the user in the Available User field, and click the Add button.
6. Click OK.

To change the priority of the work order:

1. Click in the Prt cell for the work order where you want to change the priority. A list appears.
2. Select the priority you want. Emergency=1, Regular=2, and Low=3.

Making Changes with the View/Edit dialog

The View/Edit Work Order dialog box offers a shortcut to changing many work order details at once without leaving the Dispatch Board. It also gives a view of the last note written in the work order's Notes field. This allows dispatchers to communicate quickly with technicians in the field.

View/Edit Work Order #APLC0045

Status: Needs Attn	Assignment:	
Priority: Regular	Team: 200 Arlington Place	
Specialty: Plumbing	Filter by: Unspecified	
Dependency:	Assigned To: Sasha	
Access/Appt: PTE	Scheduled Start: 03/31/2006 12:00 PM	
Invoice: <input checked="" type="radio"/> No <input type="radio"/> Yes	Duration: 1 hrs 00 mins	

Most Recent Note:
 Tenant says they're having a reception tomorrow, want to upgrade this to urgent priority. ??No: Bill has secondary assignment on this, he has Moen parts and will complete this. Proceed to your next appt.??FYI, tenant hysterical.

 I can read and add notes using the View/Edit Dialog box.

Work Items

Asset	Task	Description	Disposition
Faucet - Kitchen	Handle Loose	Handle is not working	

| OK | | Cancel |

To access the View/Edit Work Order dialog:

1. Open the View/Edit Work Order dialog from either the Dispatch Board or the Calendar View:
 - **From the Dispatch Board:** Click on the arrow  at the left of the work order number. The View/Edit Work Order dialog box opens.
 - **From Calendar View:** Click on the work order icon  to the left of the work order number of a scheduled work order, or on the arrow  at the left of an unscheduled work order number. The View/Edit Work Order dialog box opens.
2. Make changes as needed to the work order fields and click OK.

Most fields are identical to those described in Basic Work Orders. If an option is not available, navigate to the full Work Order Details page and make the change there.

Customizing the Dispatch Board

You can customize the Dispatch Board to specify the number of columns that are displayed and the column headings.

To customize the Dispatch Board:

1. From the Work Orders menu, choose Settings, then Dispatch Board. The Dispatch Board Configuration page opens.
2. Customize the column headings, if you choose, by typing your custom heading in the Display As field. This is what appears at the top of the column on the Dispatch Board.
3. Set the column order by selecting rows and clicking the Move Up and Move Down buttons. The order of fields from top to bottom on this configuration page equals the order of the columns from left to right on the Dispatch Board.
4. If you want to add custom work order fields to the Dispatch Board, scroll down until you see the arrows ▼ under Field. Click an arrow to pull down a list, then select an item in the list. (These fields must be pre-defined.)
5. Fill the check boxes in the Show column for the columns you want to appear on the Dispatch Board. Check boxes are enabled only when there is text in the Display As field.
6. Adjust the column widths in pixels, comparing the Total listed at the bottom to the Target Total Width of 765 as a guide. If your total is too high or too low, Corrigo will automatically adjust the column widths by spreading the excess or shortfall across the other columns.
7. Click OK when you've finished making your changes.

Tips:

- ✓ A maximum of 11 columns can be displayed on the Dispatch Board. If more than 11 are selected, a message box informs you that you have exceeded the limit and must clear some of the check boxes.
- ✓ Scroll down in the Dispatch Board Fields list to see other fields, including custom fields and address fields.
- ✓ Click the Restore Default Setting button if you want to return to the original Dispatch Board configuration.

Using Calendar View

Calendar View is a visual complement to the Dispatch Board. It gives an overview of scheduled work orders across daily, weekly, or monthly time frames, as well as a listing of unscheduled work orders. Dispatchers can use Calendar View to quickly find identify appropriate time slots and use shortcuts to schedule work orders without leaving the Calendar. It can also display scheduled work orders for a given day by individual users, helping dispatchers distribute workloads across teams.

The Calendar has three areas:

- The top header area, with scope, filter, and refresh settings;
- The unscheduled list, a Dispatch Board-style list of unscheduled work orders
- The calendar pane, which displays scheduled work orders in month, week, or day contexts

The work orders in the unscheduled list and in the calendar pane use the same font and color conventions as in Dispatch Board.

To access Calendar View:

1. Navigate to the Dispatch Board (Click on the Work Orders tab, then select Dispatch Board from the drop-down menu).
2. At the top right corner of the Dispatch Board, click on Show Calendar.
3. To return to the Dispatch Board, click on Show List in the top right corner of the Calendar View.

Filtering Calendar View

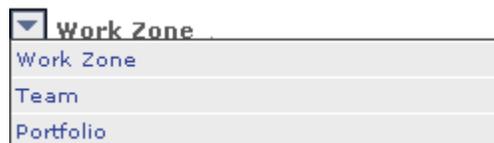
Like the Dispatch Board, the Calendar View displays as much or as little information as you want to see. You have several options for focusing the scope of the displayed information at different levels.

Note:

Filters and scope settings you set on the Dispatch Board will carry over to Calendar View when you open it. Similarly, the Dispatch Board will inherit changes you make in Calendar View.

To set the scope:

1. Click the arrow  near the top center of the board to the right of the Refresh Now button. A pull-down list opens.

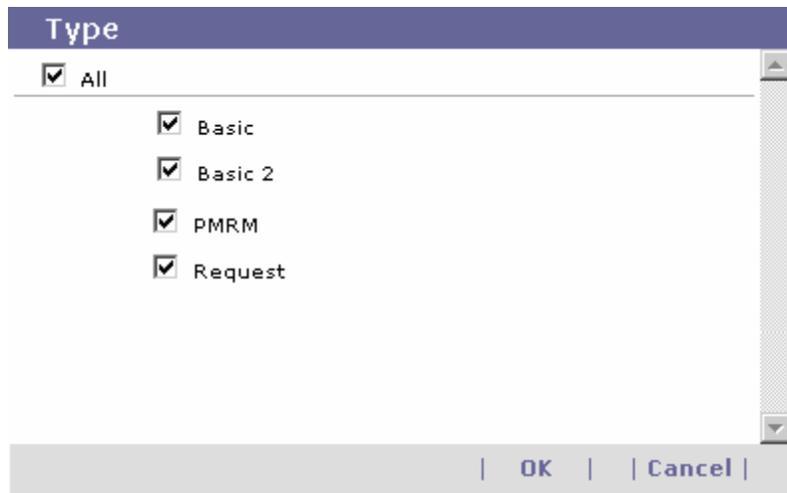


2. Click the item in the list by which you want to focus your information. This refreshes the pull-down box further to the right with the appropriate choices.
3. Pull down the box on the upper right of the page, and choose an item. The list of unscheduled work orders updated to reflect the new scope applied.



To focus by work order type:

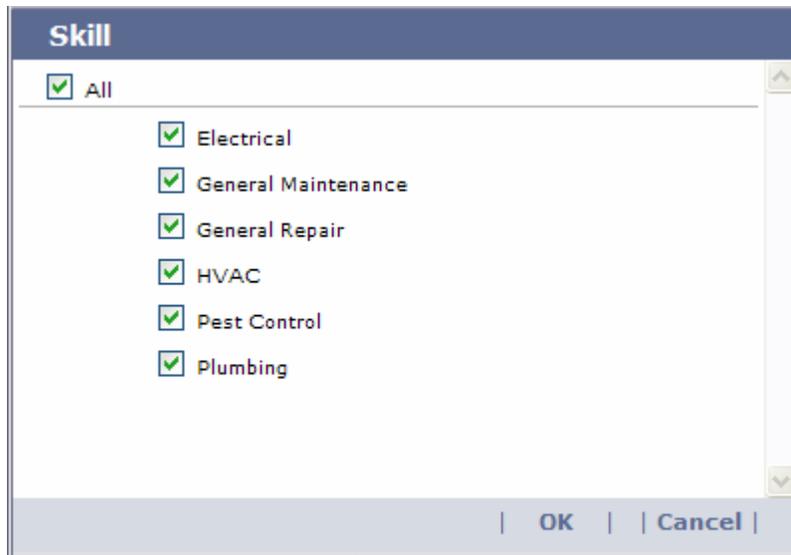
1. Click the arrow  to the left of Type Filter. The Type Filter dialog opens.



2. Check the boxes for the types of work orders you want to see. Clear the check boxes for the statuses of work orders you don't want to see. If you check All, you will see all work order types.
3. Click OK.

To focus by specialty:

1. Click the arrow  to the left of Specialty Filter. The Specialty Filter dialog opens.

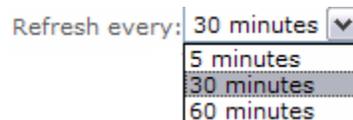


2. Check the boxes for the specialties you want to see. If you remove the check beside All, all the checkmarks will be removed for all the specialties. You can then select the specific specialties to display. To add all the specialties back in, place a check beside All.
3. Click OK.

To refresh Calendar View:

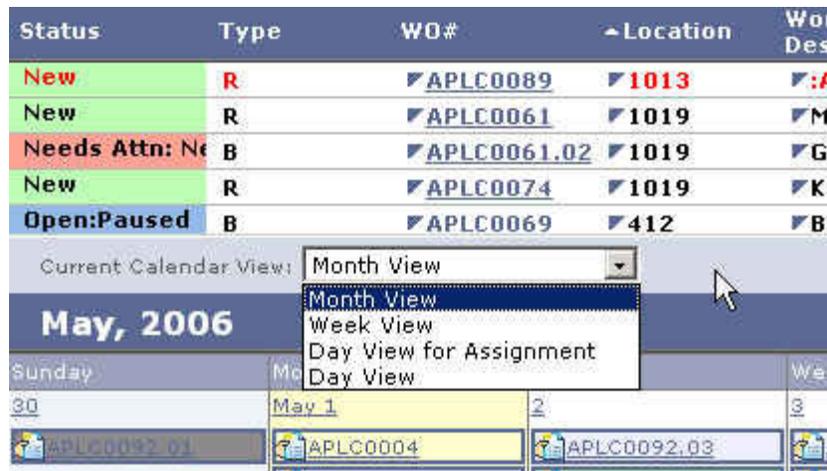
Click the Refresh Now button at the top left of the page to refresh Calendar View at any time and update it with the latest data.

You can also set Calendar View to refresh automatically every 5, 30 or 60 minutes using the pull-down menu in the upper left corner.



Using Calendar Views

The calendar pane shows scheduled work orders, both assigned and unassigned. There are four different views available for the calendar pane: Month, Week, and Day View, and Day View for Assignment. These settings are chosen from the drop-down menu available just below the unscheduled list.



Month View

Month View displays scheduled work orders by day, with the earliest scheduled times at the top.

Calendar: 6 Unscheduled Work Orders | Show List

Refresh every: 5 minutes | Refresh Now | Property: 200 Arlington Plaza | Create Request

Type Filter: Off | Specialty Filter: Off

Status	Type	WO#	Location	Work Description	Scheduled Start	Assign	Prt	Acc / Appt	Due by date
New	R	APLC0089	1013	:Alarm - Entr	N/A	Sam Cleme	1	PTE	14:00 04/13
New	R	APLC0061	1019	Multi-item: W	N/A		2	PTE	12:00 12/08
Needs Attn: Ne	B	APLC0061.02	1019	Garage:Walls	N/A	Bill Bailey	2	PTE	14:00 03/27
New	R	APLC0074	1019	Kitchen:Rang	N/A		2	PTE	15:00 03/27
New	TI#	APLC0084	11/1001	Bathrooms:C	N/A		2	Call First	17:00 04/01

Current Calendar View: Month View

April, 2006 | Previous Month | Next Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	Apr 1
	APLC0071.04 APLC0073.04 APLC0073.02 APLC0077.01 APLC0031 APLC0041 APLC0042 APLC0057 More...	APLC0073.03 APLC0080.02 APLC0077.02 APLC0077.02	APLC0078.01 APLC0080.03 APLC0077.03 APLC0073.04	APLC0077.04 APLC0079.02 APLC0080.04 APLC0064 APLC0024 APLC0027 APLC0057.04 APLC0069.03	APLC0079.03 APLC0034 APLC0045 APLC0070 APLC0081	
2	3	4	5	6	7	8
	APLC0067.05 APLC0080.04 APLC0067.02 APLC0032 APLC0022	APLC0067.05 APLC0080.02	APLC0067.08 APLC0072.07 APLC0069.02	APLC0081.04		
9	10	11	12	13	14	15
	APLC0035		APLC0053 APLC0087	APLC0086 APLC0090	APLC0088 APLC0091	

- If there are too many work orders to fit on a day square, the word More.... will appear at the bottom. Clicking on this link will take you to the Day View for that day.

- To navigate to another month, click Previous Month or Next Month at the top right side of the calendar pane.
- To change the view from Monthly or Weekly to Day view, click on any hyperlinked date in the calendar pane to bring up that day’s work orders.

Week View

Week View displays scheduled work orders by day and by hour. The size of the time slot depends on the time given in the Duration field on the work order. Those with no duration entered, or a time of less than 30 minutes, occupy half-hour time slots by default. Work scheduled at the same time shows side-by-side.

Calendar: 6 Unscheduled Work Orders | Show List

Refresh every: 5 minutes | Refresh Now | Property: 200 Arlington Place | Create Request

Type Filter: Off | Specialty Filter: Off

Status	Type	WO#	Location	Work Description	Scheduled Start	Assign	Prt	Acc/App'l	Due by date
New	R	APLC0061	1019	Multi-item: Window	N/A		2	PTE	12:00 12/08
Needs Attn: Nee	B	APLC0061.02	1019	Garage:Walls:Dryw	N/A	Bill Bailey	2	PTE	14:00 03/24
Open:Paused	B	APLC0069	412	Bathrooms:Basebo.	N/A	Calderon, V	2	N/A	13:00 03/21
New	R	APLC0074	1019	Kitchen:Range Hood	N/A		2	PTE	15:00 03/24
New	TI#	APLC0084	11/1001	Bathrooms:Closets:	N/A		2	Call Fil	17:00 04/05

Current Calendar View: Week View

March, 2006 ◀ Previous Week Next Week ▶

	Sun, Mar 26	Mon, Mar 27	Tue, Mar 28	Wed, Mar 29	Thu, Mar 30	Fri, Mar 31	Sat, Apr 01
8:00 AM		APLC0031	APLC0042	APLC0073.04	APLC0079.03		
9:00 AM		APLC0042	APLC0080.01		APLC0084	APLC0081	
10:00 AM		APLC0066			APLC0067.03		
11:00 AM		APLC0061.02					
12:00 PM		APLC0052					
1:00 PM		APLC0036					
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM							

- To change from Week View to Day View, click on any hyperlinked date in the calendar pane to bring up that day’s work orders.
- To navigate to another week, click Previous Week or Next Week at the top right side of the calendar pane.

Day View

Day View displays scheduled work orders, with the left half of the pane showing unassigned and the right half showing assigned work orders. The size of the time slot depends on the time given in the Duration

field on the work order. Those with no duration entered, or a time of less than 30 minutes, occupy half-hour time slots by default. Work scheduled at the same time shows side-by-side.

Calendar: 7 Unscheduled Work Orders | Show List |

Refresh every: 5 minutes Property: 200 Arlington Place

Type Filter: Off Specialty Filter: Off

Status	Type	WO#	Location	Work Description	Schedule Start	Assign	Prt	Acc/App	Due by date	Specialt
New	R	APLC006	1019	Multi-iter	N/A		2	PTE	12:00	Window
Needs Attn:	B	APLC006	1019	Garage:V	N/A	Bill Bai	2	PTE	14:00	Walls Ce
Open:Pause	R	APLC006	309	Bathroom	N/A	Marott	2	PTE	15:00	Electrica
Open:Pause	B	APLC006	412	Bathroom	N/A	Calder	2	N/A	13:00	General
New	R	APLC007	1019	Kitchen:R	N/A		2	PTE	15:00	Applianc

Current Calendar View: Day View

27 March, 2006 ◀ Previous Day Next Day ▶

	Unassigned	Assigned
8:00 AM	APLC0073.02	APLC0072, APLC0071
9:00 AM	APLC0077.01	APLC0031
10:00 AM	APLC0041	APLC0042
11:00 AM		APLC0057
12:00 PM		APLC0080.0, APLC0021

- To navigate to another day, click Previous Day or Next Day at the top right side of the calendar pane.

Day View for Assignment

Day View for Assignment gives a view into workload information and resource assignment. It can display assigned and unassigned work order like Day View, but also displays scheduled work orders across selected technicians.

Calendar: 5 **Unscheduled Work Orders** | Show List

Refresh every: 5 minutes | Refresh Now | Property: 200 Arlington Plaza | Create Request

Type Filter: Off | Specialty Filter: Off

Status	Type	WO#	Location	Work Description	Scheduled Start	Assign	Prt	Acc/Appt	Due by date
New	R	APLC0100	206	Kitchen:Dish	N/A	Phil Marlo	2	Call First	08:00 05/1
New	R	APLC0089	1013	:Alarm - Ent	N/A	Sam Clem	1	PTE	14:00 04/:
New	TI#	APLC0084	11/1001	Bathrooms:t	N/A		2	Call First	17:00 04/1
New	R	APLC0074	1019	Kitchen:Ran	N/A		2	PTE	15:00 03/:
New	R	APLC0061	1019	Multi-item: 1	N/A		2	PTF	12:00 12/1

Current Calendar View: Day View for Assignment | Assignment Filter: On

27 March, 2006 | Previous Day | Next Day

Time	Unassigned	Bill Bailey	Calderon, Vanessa	Dolores, Dispatchio	Phil Marlowe	Sam Spade
8:00 AM		APLC001	APLC0072, 04			
9:00 AM	APLC001	APLC001				
10:00 AM		APLC001		APLC0042		
11:00 AM						
12:00 PM		APLC001			APLC001	
1:00 PM		APLC001				APLC0066
2:00 PM	APLC003, APLC006		APLC0043			
3:00 PM				APLC0052	APLC001, APLC001	

To open Day View for Assignment:

1. Choose Day View for Assignment from the drop-down menu in the Calendar View setting.
2. The Assignment Filter will appear to the right of the view setting. Click on the arrow  to open the Users dialog.

Users

Display Unassigned Work Orders

Team: 200 Arlington Place

Users:

- Alexandra, Laukhina
- Bill Bailey
- Butuk, Janet
- Calderon, Vanessa
- Dolores, Dispatchio
- Flores, Carmen
- Joseph, Ciancanelli
- Marotta, Daniel
- masha, khokhlova
- Masha, Khokhlova
- Monceda, Jocely

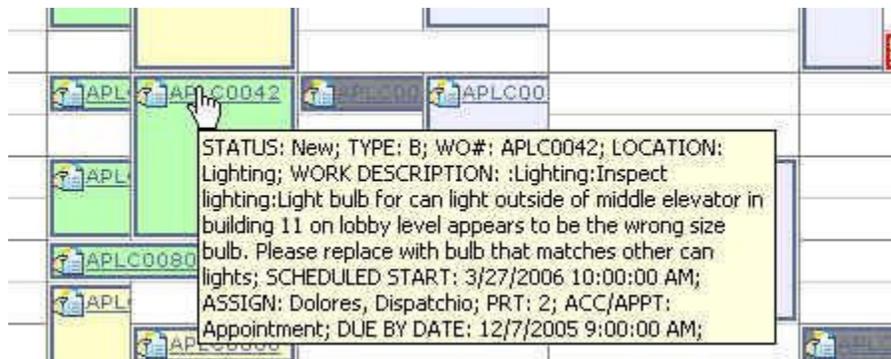
OK | Cancel

3. Choose the team you want to view from the drop-down menu. The team must have access to the property or portfolio in the main Calendar View scope setting.
4. Mark the boxes next to the technicians whose workload you want to view.
5. If you want to view unassigned work order for this day as well, check Display Unassigned Work Orders.
6. When you are finished, click OK.

Viewing and Editing Work Orders in Calendar View

There are three ways to view the details of work orders from the calendar pane:

- Hover over the scheduled time slot with the mouse to see a summary.



- Click on the work order icon  beside the work order number to open the View/Edit Work Order dialog.
- Click on a work order number to bring up the Work Order Details page.

Scheduling and Rescheduling Work Orders in Calendar View

To schedule a work order in the unscheduled list:

- Click the shortcut arrow  in the Scheduled Start column to bring up the small scheduling calendar. Selecting a date and time will remove the work order from the unscheduled list and place it in the calendar pane.

Or:

- Click the arrow  beside the work order number to bring up the View/Edit Work Order dialog. Editing the Scheduled Start field will remove the work order from the unscheduled list and place it in the calendar pane.

To reschedule a work order in the calendar pane:

- Click on the work order icon  beside the work order number to open the View/Edit Work Order dialog. Editing the Scheduled Start field will move the work order when the Calendar refreshes.

Or:

- Click on a work order number to bring up the Work Order Details page. Editing the Scheduled Start field will move the work order when the Calendar refreshes.

Glossary

A

Action Log: A work order feature showing the chronological history of actions on the work order.

Alerts: Automatic notifications received by email or mobile device that can be set to notify personnel of appointments, status changes to work orders, and other critical information.

Assets: The real property, equipment, or service that defines where and on what a work order is to be performed. Examples of assets are buildings, appliances, utilities, and equipment.

Attributes: Custom fields for models that can be set up to identify particular features of an asset, such as color, serial and model numbers, condition, and inspection date.

C

Cancelled: A work order status that renders the request inactive. Work orders can be cancelled at any point in their life cycle.

Completed: A work order status indicating that the required work has been performed satisfactorily and the objective met. Work orders with the status Open, Needs Attention, or On Hold may be completed.

Contract: The agreement that associates customers with assets and the services performed on those assets. In some implementations, contracts may be called Service Agreements or Leases.

Customer: The entity serviced by the enterprise; may be called Tenants, Residents, or Homeowners in some instances.

Item: A specific asset for which a work order is created.

I

L

Labor code: A specification for a rate of compensation or remuneration for specific type of labor (e.g., straight time and overtime). Labor rates may differ from work zone to work zone.

Materials: Parts and accessories used to complete the work order objective.

M

Models: Definitions for all of the assets in the CorrigoNet system on which work is to be done. Models have associated attributes and tasks defining them and the work to be done on them.

Mobile Device: A portable, internet-connected device used for creating, receiving, opening, and updating work orders and related information from the field. Mobile devices used with Corrigo include select phones, BlackBerrys, Pocket PCs, and similar.

N

Needs Attention: A status that flags a work order for attention from a user. Any open or new work order can be given this status.

O

On Hold: A work order status indicating that work has ceased due to circumstances beyond the technician's control, such as a need for parts or authorization. Any open work order can be placed on hold.

Open: A work order status indicating that a work order has been picked up by a technician

or vendor.

Open: In-Progress: A work order status indicating that work has started. Work orders are in progress when a user indicates via mobile device that work has begun.

P

Permissions: Also called Privileges. Rights assigned to users governing access and use of the system. A user's permissions determine his or her role. Each role has a specific, defined subset of the system which it can see and use.

Personnel: Human resources, either employees or vendors, who perform the work to complete work orders. All personnel are Users in CorrigoNet and may be referred to as Employees in the interface in your implementation

PM/RM: Preventive maintenance and routine maintenance. PM/RM work orders are generated automatically as scheduled, not in response to service calls.

Portfolio: A collection of work zones. Might be referred to as Region, District in the interface in some implementations.

Priority: A ranking of relative urgency assigned to each work order.

Property: A typical name in many instances for work zone; other implementations might use Subdivision, Community, or Campus.

Punch List: A task list that can be attached to a work order.

R

Reports: Statistical data generated by the system in various forms and levels of detail. Data related to work zones and work order generation and completion can be tracked for analysis.

Role: Personnel designation comprising a collection of permissions assigned to each user. Examples of roles are system administrator and technician.

S

Service Request: A solicitation for work to be performed originating from the customer, typically either by phone or through the Customer Portal.

Specialty: A specialized service capability associated with a user; may be used in auto-routing work orders.

T

Task: The action to be completed in connection with the asset in satisfying the work order. This is the central issue for which service is being requested.

Team: A group of users associated with a work zone.

U

Unit: An asset, such as an apartment, suite, or store, to which a contract can be attached.

User: A person, typically an employee or vendor, with access to CorrigoNet via user ID and password. Users are assigned roles with a set of permissions that determine what they can see and do in CorrigoNet.

W

Work Order: A statement of work to be performed, defining the location, assets or services, tasks, and other details, usually assigned to a single technician to be completed in a single session.

Work Zone: The top-level asset containing all other assets and defining an area in which service is provided. Work zones may be called Properties, Job Sites, Subdivisions, Communities, etc. in different implementations.