Using Schedule

Page Content: Learn about using the Schedule view to manage your organization's scheduling and dispatching requirements. The information provided in these pages includes an overview of the Schedule view, including a list of terms that are used in relation to Tasks and Engineers (Resources) in the Schedule view, and detailed instructions for the user on how to work with the Schedule view in Service Edge.

Pages For This Content:

Accessing the Schedule View
This page explains how to access the Schedule View in the Service Edge UI.

Tasks and Resources in the Gantt
This page contains information on working with the Gantt, including viewing the Gantt, customizing the Gantt display, filtering the Gantt and the Resources list, selecting Tasks, checking rule violations, unscheduling Tasks, focusing on Tasks and highlighting corresponding Tasks. It also describes the options available for flexible lunch breaks.

Loading Data by Time Domain and Business Hierarchy
This page contains information about loading data by time domain and business hierarchy into the Schedule view of the Service Edge UI.

Searching for Tasks or Resources in the Schedule View
This page provides information on how to search for resources or tasks in the Schedule view of the Service Edge UI.

Monitoring Tasks and Resources on the Map
This page explains about monitoring Tasks and Resources on the map in the Schedule view of the Service Edge UI. Learn about monitoring Resource locations, map controls, map icons, viewing Resources/Task locations on the map, and viewing route information.

Managing the Schedule
This page provides information on how to effectively manage the schedule in the Schedule view of the Service Edge UI.

- Scheduling Tasks — This page explains the options for scheduling tasks that were not scheduled by the automatic scheduling service.
- Optimizing the Schedule — This page provides information on how to optimize the schedule, and keep it continuously up to date.
- Service Excellence — This page describes the Optimize to Goals view that you can use to improve and individualize the schedule policy in each geographic area, and the Value Meter view that displays measures of the scheduling activity.

Managing Tasks
Learn about the Schedule functionality for handling all aspects of task management, including basic task actions and working with the Task List. Tasks actions are available from both from the Task List and the Gantt.

- Working with the Task List — This page introduces the Tasks List and the actions available to you for working with the Task List. It also describes the Clipboard and its uses and the Actions button.
- Task Actions — This page describes actions available for tasks and provides information about bulk operations on tasks. You can access task menu items from both the Task List and Gantt in the Schedule view of the Service Edge UI.
- Task Form — This page describes the Task form of the Service Edge UI which includes tabs with different information regarding a task. You can use the task form to display and edit task properties.
- Creating New Tasks — This page provides information on how dispatchers can create new tasks from the Schedule view of the Service Edge UI. It also provides information on recurring tasks, which are tasks that run on a regular, periodic schedule.
- Creating Multistage Tasks — This page describes the concept of multistage tasks and how to create multistage tasks using task dependencies.
- Getting Candidates for a Task — This page describes how you can search for candidates that can be assigned to a specific task considering all task requirements, as well as how you can relax these restrictions.
- Working with Megatasks — This page describes the concept of a megatask, how to create a new megatask and actions available for megatasks.
- Sending a Task PDF Report Manually — This page explains how to manually generate a PDF report for a task, and send the report by email to the recipient.

Managing Resources
Learn about the management of resources in the Schedule view of the Service Edge UI, including basic resource actions, handling resource availability, and handling contractors.
• **Resource List Actions** — This page details the basic actions that can be performed on resources in the Resource List of the Schedule view in the Service Edge UI.

• **Resource Form** — This page describes the Resource form of the Service Edge UI which includes tabs with different information regarding a resource. You can use the resource form to display and edit resource properties.

• **Handling Resource Availability** — This page explains how to handle resource availability, including adding, modifying, defining a recurrence pattern, and deleting nonavailability periods, in the Schedule view of the Service Edge UI.

• **Resource Scoring** — This page describes the option of adding scores to resources based on customer ratings.

• **Working with Contractors** — This page provides information about handling contractors in the Schedule view of the Service Edge UI and managing contractors in the Contractor Management view. It also describes how to add a Contractor Company to the Contractors Network.

• **Managing Crews** — This page describes the concept of a crew, the Crew Management view, and the Crew form. It explains how to create a new crew, and how to allocate resources to a crew.

• **Managing Teamwork** — This page details how the teamwork feature enables creating a team for a task so that multiple resources can be scheduled to work together to complete it.

• **Relocating Resources** — This page describes how you can temporarily relocate resources from one hierarchical unit to another. It describes how to create a one-time relocation and recurring relocations. As well as how to edit and delete relocations.

• **Planning Resource Territories** — This page describes how to use the Territory Planning view to allocate territories that are enforced by the Territory Planning rule to resources, defining the working areas where tasks can be assigned to resources. It also describes using the Shape Editor tool to create shapes and working areas.

**Managing Calendars**

This page explains how to work with the Calendar Management view, including creating and editing a calendar, creating a calendar time interval, creating a shift interval, exporting and importing calendars, and assigning a calendar to a resource.

**History of a Business Object**

This page describes the History tab of the Business Object form. The tab displays an audit trail of the operations performed on the object.

Designed for organizations that provide various types of service, Service Edge ensures users (typically customer service representatives, CSRs) that considerations vital to the service organization are being met. These considerations include selecting a resource who is qualified and available to handle the task and who is closest to the customer's site. Selecting such a resource utilizes the human resources of your organization to their fullest potential, while providing your customers with efficient, timely and professional service.

Service Edge has unique customization capabilities. The system integrator can tailor certain aspects of the built-in functionality and logic of the system to the needs of your service organization.

Service Edge can be integrated with any Customer Relations Management (CRM) or Enterprise Resource Planning (ERP) system to provide better and more efficient scheduling of service personnel and other resources.

**Automating the Scheduling Process**

Service Edge automates and streamlines the scheduling process by enabling it to be performed with minimal human intervention. The scheduler need only handle predefined exceptions. For example, if a task needs to be rescheduled due to a resource's delay at a customer site, the scheduler can reschedule it interactively using Service Edge.Schedulers can benefit from the efficiency of Service Edge as it finds the best way to schedule the most suitable resource for the task, by using predefined business rules that are set according to your organization's needs.

Service Edge provides two modes of operation: automatic and interactive.

- In automatic mode, the Automatic Scheduling service schedules tasks according to predefined business rules and objectives.
- In interactive mode, the scheduler works together with Service Edge to schedule tasks. When scheduling tasks interactively, the scheduler can either decide which resource to use and at what time a task should be performed, or allow Service Edge to assist by providing alternative scheduling options for tasks.

**Built-in Scheduling Criteria**

Service Edge provides scheduling capabilities with built-in scheduling criteria that take into consideration parameters such as:

- Customer contracts and priority
- Customer location
- Required resources
- Resource availability
- Organizational calendars
- Resource's skills

These criteria aid in scheduling by helping automate the process. Other scheduling criteria (known as business rules), unique to your organization, can be added to suit your organization's needs. The system schedules a task according to these rules, and Service Edge notifies you when these rules are violated. You can then choose to ignore the rules and schedule the task anyway, or cancel the scheduling.

**User Interface**
The user interface of the Schedule view enables various types of users, such as dispatchers and schedulers, to access key functionality. It provides a comprehensive view of the task workload and the tasks assigned to each resource, and enables regular dispatchers and/or remote users to perform various scheduling tasks, including creating, scheduling, and unscheduling tasks and non-availability periods.

The Schedule view is a user-friendly graphic interface that provides a visual display of all the scheduled tasks for each resource on a day-by-day basis.

The Gantt displays a list of resources together with their scheduled tasks. It provides you with a comprehensive view of the resource's schedule, giving you an immediate indication of the resource's availability.

The Task list provides a comprehensive view of the task workload and the tasks assigned to each resource. It enables you to receive quick answers to task-related questions such as:

- Which tasks are more urgent than others?
- Which tasks required by the customer have not yet been scheduled?
- Which tasks are in jeopardy?

**Typical Workflow**

Service Edge offers users flexibility in how and when they perform various operations. The following workflow describes how dispatchers and schedulers might effectively use the Schedule view of the Service Edge user interface to fine-tune their organization's schedule, and handle exceptions.

To begin, you first need to access the user interface. To learn how to access it, see [Accessing the Schedule View](#).

Once you have the Schedule view open, select the business entity and time period for which you want to display data. In the Schedule view of the Service Edge UI, the business hierarchy is accessed through the Working Domains link.

Next, to facilitate management of your task workload, you can apply a filter to define which tasks are displayed on your Task List, for example, unscheduled tasks. To learn about using filters, see [Filtering the Task List](#).

You can then edit the schedule interactively using scheduling tools, for example, by scheduling unscheduled tasks. You may first want to find a resource that is appropriate for the task by looking at the Resource Form or using the Resource Gantt filters. You can then select the task and schedule it by dragging and dropping it onto a resource on the Resource Gantt chart. Alternatively, you can select a task and then select the Get Candidate option, described [here](#), to view the availability of qualified resources, and then schedule the task accordingly. For more information about scheduling, see [Scheduling Tasks](#).

If any rule violations occur, you can view the Rule Violations dialog box and decide whether to schedule the task anyway or look for a more suitable scheduling option. Once the task has been scheduled, you can view its updated task details in the Task Card, in order to relay the new task information to the appropriate resource.

You can also further optimize your schedule by identifying under-utilized resources and using the Schedule Idle Resource options to improve the level of coverage and utilization.

In addition, throughout the day, Service Edge enables you to update scheduled tasks, allowing you to handle any exceptions that occur in the field. For example, if a resource is detained in the field and is unable to arrive at the next task at the scheduled time, you can assign a different resource to the task. Service Edge also enables you to change schedule details in response to changes in customer requests.

Depending on your user profile, certain functionality, for example Drag and Drop, may have been disabled by the system administrator.