



Achieve real-time schedule visibility. Maximize field workforce productivity. Manage responsibilities. Reduce planning costs. Improve customer satisfaction. Avoid missed SLAs.

## PERSPECTIVE

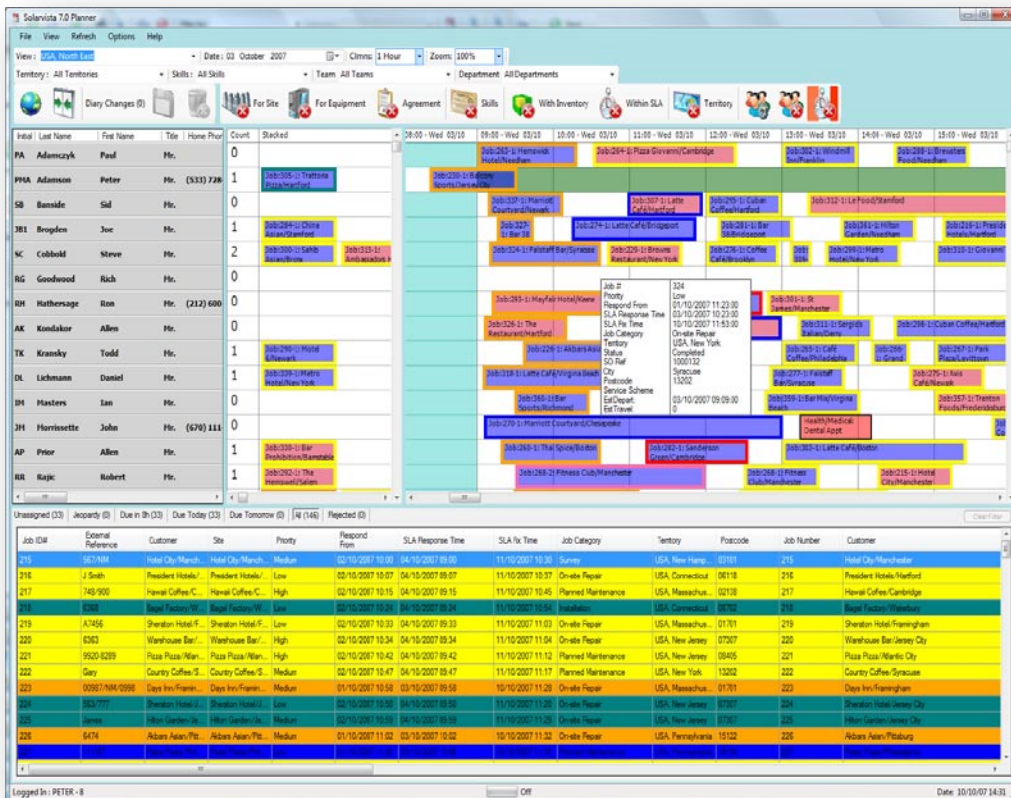
Planning your work is a key element in delivering exceptional service to your customers. But with differing service level commitments, skill sets, geographic responsibilities and other resource requirements to consider all at once, planning for any more than a few resources is an extraordinary difficult task. To meet this challenge, Solarvista™ has developed **Solarvista™ 7.0 Planner**.

## WHERE TO USE:

- Service Job Dispatch
- Field Resource Planning
- Customer Service Centres
- Planned Maintenance Scheduling

## FEATURES AT A GLANCE:

- Concurrent Gantt-style diary and job stacks.
- Configurable planner views by user.
- Real-time colour coded job status<sup>2</sup>.
- Shows jobs, appointments and shifts.
- Real-time flashing Jeopardy notifications<sup>3</sup>.
- Drag & drop functions with full SLA and rule validation.
- Selectable data columns.
- Hover information windows.
- Dynamic Show Candidates Tool with SLA guide overlay.
- Messaging/notifications to mobile devices.
- Job search and filters.
- Multiple zoom levels.
- Easy to read 'now' line.
- Integrated map views<sup>4</sup>.
- Multi-user "all-at-once" lone worker alerts.



## INTRODUCING... SOLARVISTA™ 7.0 PLANNER

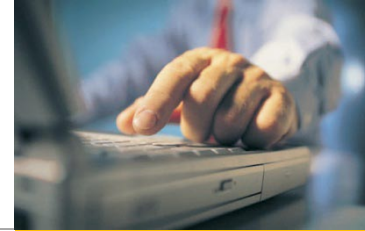
**Solarvista™ 7.0 Planner** delivers a configurable, Gantt-style view of your organisation's complete workload, either to be assigned or in progress. It enables dispatchers and planners to effectively manage resource assignments and schedules using job stacks or diaries for all personnel being managed. Furthermore, it delivers tools to assist with assignment and scheduling decisions based upon service levels (SLAs), customer or territorial responsibilities and shift availability. It is suitable for all categories of field service but also can be used to assign other types of personnel/resources.

USE WITH SOLARVISTA™ 7.0 OR INTEGRATE WITH YOUR EXISTING SOLUTION<sup>5</sup>.

**Solarvista™ 7.0 Planner** is available as part of a complete integrated solution, Solarvista™ 7.0 Service Management System, or it can be integrated with your existing systems as part of the Solarvista™ 7.0 Workforce Mobilisation Platform. In both cases, feedback of status and departure/arrival/start/end times from Solarvista™ 7.0 Mobile Worker is represented by colour changes in real-time.

## BENEFITS/RETURN ON INVESTMENT:

- Full visibility of personnel schedules.
- Accurate historical viewing of activity.
- Real-time job status feedback.
- Improved customer satisfaction.
- Better use of field resources.
- Immediate notification of jobs in jeopardy<sup>3</sup>.
- Shorter scheduling decision time.
- Reduced planner/dispatcher workload.
- Reduced service level (SLA) violations.



## TECHNOLOGY

- Operates on industry-standard, Microsoft® Windows™ XP or Vista.
- Developed using industry-standard Microsoft® .NET technology.
- Data is locally stored and updated when network available (an initial connection must be made for configuration to be downloaded).

## PLANNER LAYOUT

- Menus and Toolbars – at the top of the Planner window, this area is where the user inputs commands to control the displayed information.
- Personnel List – to the left of the Planner window, this displays names, phone numbers, status and other information about personnel (i.e. technicians/engineers etc.)
- Personnel Job Stack – in the middle of the Planner window, this displays jobs that have been assigned to personnel but do not have an estimated start time.
- Personnel Diary – to the right of the Planner window, this displays jobs, shifts and appointments in a Gantt-style format.
- Jobs List – to the bottom of the Planner window, this displays jobs in a list/grid format separated by tabs for different statuses.

## DATA/SCREEN REFRESH

- Screens refresh automatically every 5, 10, 15, 20, 30 seconds or 1, 2, 5, 15, 30 minutes.
- Auto refresh may be turned off or manually triggered by single click at base of screen or via menu option.

## RESPONSIBILITY CONFIGURATION

- To enable dispatchers/planners to view only data relevant to their responsibilities, unlimited Planner Views may be configured and assigned to individual users<sup>6</sup>.
- Planner Views may be configured to display jobs/personnel filtered by selections of:
  - Job Priorities i.e. Urgent, High, Medium, Low etc.
  - Teams
  - Internal Departments
  - Job Classification (i.e. Field Service, Help Desk or Repair Centre).
  - Categories (both Service Order Category and Job Category)

## PERSONNEL LIST

- Lists personnel within selected Planner View which may be manually or dynamically filtered based upon other commands.
- Data fields listed (from left to right) are:
  - Initials
  - Last Name
  - First Name
  - Communications Method (Icon)
    - o 'Telephone' represents notifications via voice/telephone
    - o 'PDA' represents Solarvista™ 7.0 Mobile Worker
    - o 'Letter/email' represents email notification

- One-job-at-time Flag (Icon)
  - o 'Round 1 numeral' icon represents that person is configured to receive one job at time (sometimes referred to as "drip-feed mode").
- Title
- Home Phone
- Mobile Phone
- ID Number
- Job Title
- Post Code
- Team
- Dept
- Branch
- Pager Number

## JOB LISTS

- Multiple tabs for different statuses of jobs displayed for:
  - Unassigned – Jobs without personnel assigned.
  - Jeopardy – Jobs with Jeopardy status triggered.
  - Awaiting Acceptance – Jobs that have been assigned to a person but have not been formally accepted.
  - Rejected – Jobs that have been rejected by the person originally assigned.
  - Due in next 8 hours
  - Due Today
  - Due Tomorrow
  - All
- All tabs display Job Count in title tab.
- Jobs displayed with colour codes to represent Job Status e.g. Accepted, Arrived, Completed, Fixed/Service Restored etc.
- Configurable selection of data fields to display. Available fields are:
  - Job Number
  - Action Number
  - External Reference
  - Site Name
  - Site Postcode
  - Customer Name
  - Priority
  - Product Code
  - Product Description
  - Serial Number
  - Asset Number
  - Equipment Details
  - Location
  - Problem Code
  - Problem Description
  - Service Routine
  - Task
  - SLA Response Date/Time
  - SLA Fix Date/Time
  - SLA Respond From Date/Time
  - Job Category
  - Job Action Status
  - Service Order Category
  - Jeopardy Reason
  - Territory
  - Site Memo
  - Dealer/Agent Memo
  - Estimated Response Date/Time
  - Estimated Fix/Complete Date/Time
  - Assigned Personnel Name
  - Rejection Reason
  - Suppressed Jeopardy Reason
  - Mobile Received Date/Time
  - Mobile Assigned Date/Time

## COMPLETE SYSTEM OR INTEGRATION TO LEGACY:

Planner operates as part of Solarvista's sophisticated complete service management system (Solarvista™ 7.0 Service Management System) or as a separate product integrated to your existing legacy systems (as part of Solarvista™ 7.0 Workforce Mobilisation Platform).

## OTHER SOLARVISTA 7.0 SERVICE MANAGEMENT SYSTEM PRODUCTS:

### Business Manager

Complete, best-of-breed, service-oriented business management system including modules for service (field service, help desk, repair centre), agreements, sales, inventory, contact centre and automated financial billing.

### Mobile Worker

A feature-rich "occasionally connected" application for field service personnel operating on mobile devices.

### MapTrak

Live GPS mapping and tracking of field personnel integrated with Planner.

### Optimising Scheduler

Automated scheduling with real-time optimization and appointment booking.

### Customer Web Self Service

Allows customers to view their service jobs via the internet or register new service requests.

### Event Manager

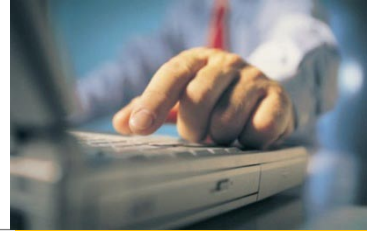
Allows events to be monitored and users/customers emailed automatically e.g. when jobs are scheduled.

### SMS Text Messenger

Sends job details as an SMS Text Message.

### Mobile Tech Content

Allows technical manuals to be stored on the mobile device and rapidly searched.



## SHOW CANDIDATES TOOL

For each Job to be assigned, the Show Candidates Tool assists the dispatcher/planner by displaying the most appropriate personnel based upon:

- Preferred Personnel based upon Customer, Equipment or Agreement.
- Skills required for work.
- Territories assigned to Personnel.
- Free time within the SLA response window.

In addition, the Planner can display colour overlay SLA Guides to clearly show appropriate response and fix/complete windows.

## FIND & SEARCH MECHANISMS

- Right-click menu on Job List allows direct find of Job on Stack or Diary.
- Right-click filter on any column within the Job List to apply criteria and filter jobs by e.g. "contains ABC", "starts with B" or "ends with 56".

## SENDING MESSAGES/NOTIFICATIONS

- Right-click, context menu allows direct send of message to Solarvista™ 7.0 Mobile Worker.
- Same message can be sent to multiple field workers at one time (filtering by Team, Territory, Branch, or Dept possible).

## JOB STACKS

- Job Stacks display jobs only which are assigned to personnel but with no scheduled or estimated start time.
- Jobs may be ordered by:
  - Job Status
  - Job Number then Action Number
  - SLA Response Date/Time then SLA Fix Date/Time
  - Customer Name then Site Name
  - Priority then Response Date/Time
- Each stack display live count for each person.
- Jobs display in fixed width as they are 'stacked' i.e. not displayed in accordance with a calendar (unlike the Personnel Diary).
- Job display block shows:
  - Job Number – Action Number : Name of Customer
  - Border colour represents Job Action Status
  - Centre colour represents Job Category

## CANCELLING/UNASSIGNING JOBS

- Jobs that have not been transmitted to Solarvista™ 7.0 Mobile Worker can be unassigned at any time.
- Jobs that have been transmitted to Solarvista™ 7.0 Mobile Worker can be cancelled via a 'Request Process' as mobile device may be out of network coverage. In this case, cancellation is confirmed when communication from mobile device is received.

## PERSONNEL DIARY

- Personnel Diary displays shifts, appointments and jobs in Gantt-style format for all personnel in scrollable horizontal window.
- Columns display date and time and widths are configurable to 15, 30 minutes, 1, 2, 3 hours or 1 full day.

- Zoom levels may be set to 25%, 50%, 100%, 200% and 400%.
- Shifts represented in background via white/grey shading.
- Appointments shown with colour coded block to represent appointment type (based upon Time Category).
- Job display block shows "Job Number – Action Number : Name of Customer"
- Border colour represents Job Action Status e.g. Accepted, Departed, Arrived, Paused, Completed etc.
- Centre colour represents Job Category
- Jobs and Appointments show start and end times via variable widths of blocks.
- Individual date can be selected via drop down calendar (historical or in future) and diary will jump directly to date (scrolling also available).
- "Now" can be selected at any time with direct button on toolbar.
- Real-time line to denote "now" is shown which moves across the diary. To the left of the Now Line, represents real-time actual jobs done/in-progress whereas (and is shaded) to the right of the Now Line, represents expected jobs to be done (which is not shaded). Jobs behind the Now Line that have been started or completed cannot be moved.
- Changes made to diary via drag-and-drop are held within a buffer until confirmed.

## SLA/SKILLS RULE CHECKING

When jobs are dragged-and dropped on Job Stack or Diary, any contravention of SLA service level applicable, skills/territory responsibility requirements trigger a warning to the dispatcher/planner.

## JOB INFORMATION

The following information is displayed in window when mouse is left to hover over a job:

- Job Number
- Action Number
- External Reference
- Customer Name
- Site Name
- Priority e.g. High, Medium Low etc.
- SLA Respond From Date/Time
- SLA Response Date/Time
- SLA Fix Date/Time
- Category of job or type of work e.g. repair, survey, installation, configuration etc.
- Status of job e.g. Accepted, Departed, Arrived, Waiting, Completed etc.
- Service Order Reference
- City of Destination Site
- Postcode of Destination Site
- Name of Service Scheme i.e. Service Level Name

In addition, the following information is available from a summary window (requires click to launch):

- Product Code
- Product Description
- Serial Number
- Asset Number
- Equipment Description
- Location
- Problem
- Task
- Memo from Customer Site
- Memo from Dealer/Agent Site

Also, a Service Order/Job record can be opened when used with Solarvista™ 7.0 Business Manager which allows full viewing of all fields and editing subject to the security rights in force for the user logged into Planner.

## A FUTURE PROOF PLATFORM

Even if using your existing legacy business control software, Planner is part of the Solarvista™ 7.0 Workforce Mobilisation Platform which means one integration exercise gives you the benefits of many products.

## OTHER SOLARVISTA™ 7.0 WORKFORCE MOBILISATION PLATFORM PRODUCTS:

### Mobile Admin Manager

Manages key information to facilitate the use of Mobile Worker with your existing business system.

### Mobile Worker

A feature-rich "occasionally connected" application for field service personnel operating on mobile devices.

### MapTrak

Live GPS mapping and tracking of field personnel integrated with Planner.

### Optimising Scheduler

Automated scheduling with real-time optimization and appointment booking.

### Customer Web Self Service

Allows customers to view their service jobs via the internet or register new service requests.

### Event Manager

Allows events to be monitored and users/customers emailed automatically e.g. when jobs are scheduled.



## APPOINTMENT INFORMATION

Appointments are used to denote non-job related time. The following information is displayed in window when mouse is left to hover over an Appointment:

- Appointment Time Category
- Appointment Memo

Also, an Appointment record can be opened when used with Solarvista™ 7.0 Business Manager which allows full viewing of all fields and editing subject to the security rights in force for the user logged into Planner.

## UPDATE HISTORY

- Single click access to historical information re status changes. Shows:
  - Date/Time
  - User who made change
  - Changed from Status
  - Changed to Status

## FILTERS

Planner displays can be filtered at any time by selection of filters for:

- Branch
- Territory
- Team
- Department

In addition, "wildcard" filters can be applied to filter on any Job List column.

## JEOPARDY ESCALATION

- Jobs in Jeopardy are shown flashing on both Stack and Diary (flashing may be manually suppressed)<sup>3</sup>.
- Personnel in Jeopardy are shown with flashing names in Personnel List<sup>3</sup>.

## LONE WORKER SAFETY CALLS/ALARMS

- When used with Solarvista™ 7.0 Mobile Worker, Lone Worker/Safety Call Alarms display on all active Planner screens when triggered together with audible bleep.
- Cancellation of alarm can only be done by typing in CANCEL to prevent erroneous cancellation of alarms.

## MAP VIEWS

- Any job can be viewed on Map with simple right click menu option<sup>4</sup>.
- All jobs within Planner View can also be plotted on a Map with single click.

1. Host system is either Solarvista™ 7.0 Business Manager in case of Solarvista™ 7.0 Service Management System or third-party application in case of Solarvista™ 7.0 Workforce Mobilisation Platform. Some features may not be feasible when used with third party application 2. This requires configuration services in addition. 3. This requires Solarvista™ 7.0 Event Manager. 4. This requires Solarvista™ 7.0 MapTrak. 5. This requires integration services to be supplied by Solarvista™. 6. Configuration is done in Solarvista™ 7.0 Business Manager or Solarvista™ 7.0 Mobile Admin Manager.

E&OE. Solarvista™ reserves the right to alter specifications without notice. The trading name, "Solarvista" is a trademark of Solarvista Limited. The product "Solarvista™ 7.0" is copyright © 1997-2008 Solarvista Limited. All rights reserved.

## DEPLOYABLE:

On desktop or laptop PCs  
Runs on Microsoft® Windows™ XP, 2000 and Vista.

### Run via Web Browser

When using Citrix® Metaframe™ Web Service.

### Via Remote Desktop

When using Remote Desktop (within Windows), Microsoft® Terminal Server or Citrix® Metaframe™.

## KEY SYSTEM REQUIREMENTS:

Microsoft® Windows™ XP, 2000 or Vista.  
Microsoft® SQL Server™ 2000 or 2005.  
.NET Framework 2.0

## CONTACT:

### NORTH AMERICA:

Solarvista Software, LLC  
225 Franklin Street, 26th Floor  
Boston, MA 02210  
United States

Tel: +1 (617) 217-2852  
Fax: +1 (617) 217-2000

### EUROPE/WORLD:

Solarvista Software Limited  
18 Atlas Way, Atlas North  
Sheffield, S4 7QQ  
United Kingdom

Tel: +44 (0) 114 221 1000  
Fax: +44 (0) 114 221 5000

www.solarvista.com  
sales@solarvista.com

Solarvista™ specialises in delivering integrated Service Management, Customer Relationship Management (CRM), Mobile and Scheduling solutions for organisations that market, sell, service and support equipment/assets or provide professional services. In addition, we provide Workforce Mobilisation software for integration with existing systems. Our products are used by companies of varying sizes, from blue chip to SME in over 20 countries.