



Mobile Technician Time Tracking

This system allows your service technicians to record time events throughout the work day to account for time spent on service work, travel, meals, etc. The Time Tracking feature also provides the option to automatically generate service order line items to account for technician labor cost on each service order.

When you activate this feature the Mobile Tech portal displays a “Time Tracking” tab that allows your technicians to enter Time Events. The Mobile Tech portal will automatically record service work and the technician may manually record other events throughout the day.

The elements of this system include:

- Configuration options to activate feature and define options
- Time Tracking Entry portal for the technician to review and record non-service order time events
- Changes to Mobile Tech portal for Time Tracking on service orders
- [Tech Manager Review](#) portal
- [Mapping via MapQuest](#) is also an option

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Configuration Options

To activate Time Tracking you must enter the following configuration options in the “Tech Tracking” tab of the Enter Service Order portal’s “SO Config” tab.

Tech Time Tracking

[Documentation](#)

Use Tech Time Tracking?

Create S/O Line Items for S/O Labor Cost?

- **Service Code (To/From Time)** LABORCOST (Labor Cost)

- **Skip S/O Labor Lines on Invoice?**

Track Multiple Techs per S/O?

Time Tracking Codes

Code for Service Order Time	<input type="text" value="Service Work"/>	
Allow Edit of S/O Time?	<input checked="" type="checkbox"/>	
Other Event 1 Code	<input type="text" value="Clock In"/>	
- Event 1 Image File	<input type="text" value="clock_run.png"/>	
Other Event 2 Code	<input type="text" value="Travel"/>	
- Event 2 Image File	<input type="text" value="techvan.png"/>	
Other Event 3 Code	<input type="text" value="Meal Break"/>	
- 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"/>	
- Event 6 Image File	<input type="text"/>	
Other Event 7	<input type="text"/>	
- Event 7 Image File	<input type="text"/>	
Other Event 8 Code	<input type="text"/>	
- Event 8 Image File	<input type="text"/>	
Server Time Zone Desc	<input type="text" value="CST"/>	

Use Tech Time Tracking?

Check this box to activate the Tech Time Tracking features.

Create S/O Line Items for S/O Labor Cost?

Check this box to have the tech portal automatically create service order line items to track the cost of technician time spent on a service order. Each time a tech works on a service order and clicks on the Finish or Not Complete button the portal will generate a service order line item to reflect the actual time spent (via a start date/time and end date/time service code). In the next field you need to specify the service code to use.

-Service Code

Here you may select the service code to use for S/O Labor line items generated. The drop down list shows service codes that have the Units Entry Method of "T" for Time entry (From/To). If you are using this feature only to track cost you should set up a service code with:

- No price
- Time entry type
- Cost based on Tech

- Skip S/O Labor Lines on Invoice?

Check this box to have the generated labor line items flagged to skip printing on the invoice. This will set the "Skip on Invoice" flag in the service order line to "S" for Skip (the flag can be viewed in field 13 "Other Info" on the line item screen in SV-01-01-03).

Track Multiple Techs per S/O?

Check this box if you want the tech to be able to indicate that other techs are assisting on a service order for Time Tracking purposes. If you activate this feature the portal will allow the tech to indicate any assisting techs each time he starts or resumes a service order. The assisting techs will get the same Time Tracking events (and S/O line items if applicable) as the primary tech for the service order.

Code for Service Order Time

The default code for time spent on service orders is "Service Work". You may edit this if desired. If you change this code after you start recording tracking info then previous S/O work will have the old code and new S/O work will get this new code.

Allow Edit of S/O Time?

Check this box if you want technicians to be able to edit the start time of a service order time event that was automatically generated from working on a service order. Leave this unchecked if you don't want technicians to be able to adjust the Time Events that are automatically generated for service orders.

Time Tracking Codes

Here you may enter up to eight 20-character codes to use for tracking technician time. There are standard defaults, and you must have "Clock In" and "Clock Out" codes to facilitate the calculation of total hours for each day.

For each Tracking Code you may optionally enter an image file name (image must exist in the NetLink "images" directory). This will display on the button to the left of the code text.

Server Time Zone Desc

Here you may enter a brief three-character description (such as "CST") of the time zone that applies for your server. This description will appear beside the related time entry fields to remind the tech to enter the correct times.

Time Tracking Entry Portal

S/O List - Bill Today's Map Time Reporting

Technician Time Reporting - Bill [Refresh Page](#)

Log an Event Starting Time

Date **08/08/16** Time **950** CST

Click a button to create an event using the time above.

Clock In

Travel

Meal Break

Personal Leave

Clock Out

Logged Event List *(All Times are server time CST)*

Click to edit the Time Event.

DATE	START	END	REFERENCE	LAPSED TIME
08/08/16	745	819	Clock In	.57
08/08/16	819	919	Service Work	1.00
08/08/16	919	925	Service Work	.10
08/08/16	925	930	Travel	.08
08/08/16	930	1200	Service Work	2.50
08/08/16	1200	1300	Meal Break	1.00
08/08/16	1300	1330	Travel	.50
08/08/16	1330	1700	Personal Leave	3.50
08/08/16	1700	0	Clock Out	.00

Total Records: 9

Total Hours: 9.25

Clock In .57 | Meal Break 1.00 | Personal Leave 3.50 | Service Work 3.60 | Travel .58 |

Calendar Display

8 Aug 2016

This portal allows a technician to see the time events recorded for today and add/edit as needed. The portal shows:

- Buttons for each Time Tracking code
- Time field (defaults to current server time)
- Time Event List
 - Option to display window to edit an event
- Calendar that displays all completed events (all except the current unfinished one)

Confirm or edit the time and click on a button to add a new event. The list and calendar will refresh with new data.

IMPORTANT NOTE on Times:

All time tracking events will be recorded using the server time (and time zone), not the time on the devices. This ensures that times will be consistent if a tech works in multiple time zones, and also ensures that current dispatch information is shown with comparable times even if different technicians are in different time zones.

Lapsed Time - The Lapsed Time is displayed in both the Event List and the Calendar. The Lapsed Time for each event is computed as the time from the start of the event until the start of the next event.

The Lapsed Times are self-adjusting - each time you add a new event it will automatically adjust the computed lapsed time of the preceding event. For example, if you forget to record a Meal Break at lunch then the calendar will show that your last event of the morning continued until your first event of the afternoon. If you then enter a Meal Break event for the correct time you started lunch the lapsed time of the last morning event will automatically be corrected.

Clock In is a reserved event to start the work day. The technician should create a Clock In event as he starts work.

- “Clock In” is excluded as an option for the next event when you finish a service order.

Clock Out is a reserved event type to end the work day.

- “Clock Out” is required in the config setup screen.
- “Clock Out” is excluded as a record to show in the Calendar (since its duration would be until the next day).
- “Clock Out” is excluded from the event totals that show under the event listing.

Event List

The event list shows each event recorded for the day as a line in a grid. A summary at the bottom shows the total time for each type of event. A Clock Out event does not have elapsed time since its purpose is to provide an ending time for the last event of the day.

Logged Event List							
DATE	START	END	REFERENCE	LAPSED TIME	S/O NUMBER	TECH	
08/08/16	745	819	Clock In	.57		Bill	
08/08/16	819	919	Service Work	1.00	00100007317	Bill	
08/08/16	919	925	Service Work	.10	00100007317	Bill	
08/08/16	925	930	Travel	.08		Bill	
08/08/16	930	1200	Service Work	2.50	00100007402	Bill	
08/08/16	1200	1349	Meal Break	1.82		Bill	
08/08/16	1349	1350	Service Work	.02	00100007317	Bill	
08/08/16	1350	1459	Travel	1.15	00100007317	Bill	
08/08/16	1459	1500	Service Work	.02	00100007317	Bill	
08/08/16	1500	800	Travel	17.00		Bill	

Total Records: 10

Total Hours: 24.2

Clock In .57 | Meal Break 1.82 | Service Work 3.64 | Travel 18.23 |

Editing an Event

You may edit a manually-entered event by clicking on the green arrow beside the event. In the popup window you may edit the time and reference.

Service order events that are automatically generated when a tech starts/resumes a service order may not be edited unless the "Allow Edit of S/O Time" option is enabled in the Time Tracking configuration options.

Edit Tracking Event

Make changes and click Update:

Tech: Bill

Date: 08/23/16

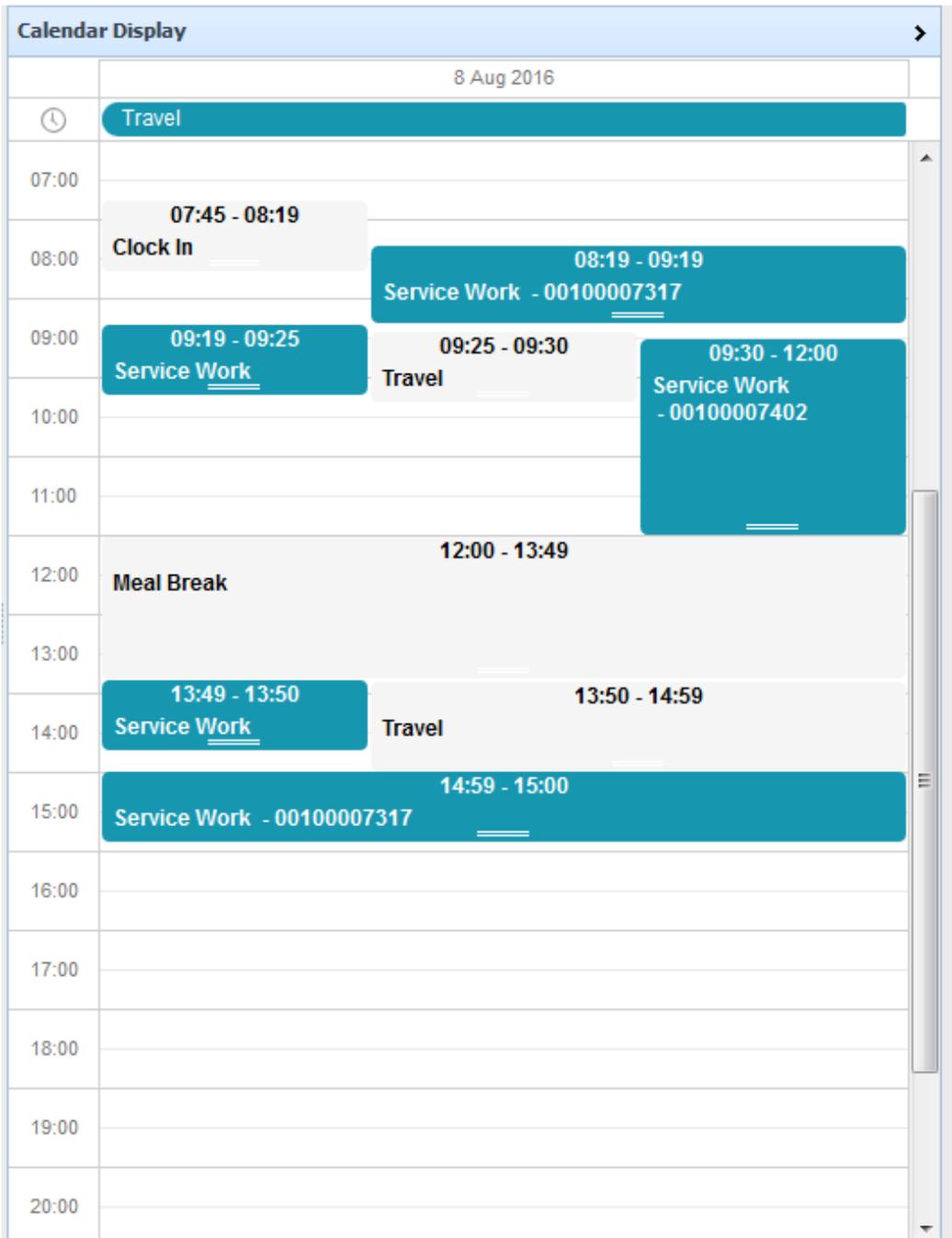
Time:

Reference:

Calendar

The calendar shows each event in a daily calendar format. This helps you visually review the recorded time events to make sure they accurately reflect the hours spent.

In order to show the info for each event the calendar will display events in multiple columns if their elapsed times overlap.



Changes to Service Entry via Mobile Tech Portal

The following additional features are activated when you use Technician Time Tracking:

Start Service Order

When you start the service order a Time Event with the service work code will be generated for the tech(s). The start date/time on the service order will be updated.

Resume Service Order

When you access a service order that was previously started a Resume button appears instead of the start button. A Time Event with the service work code will be generated for the tech(s).

Specify Any Assisting Technicians

If you activated the configuration option to “Track Multiple Techs per S/O?” then when you start or resume a service order a pop-up window will allow you to specify any techs who are working with the primary tech. The Time Events for this service order will be generated for the Primary Tech and any assisting technicians.

To add an assisting technician, choose the tech name from the dropdown list and click on the Add button. To remove a tech click on the Remove button beside the name. Press Continue when the tech info is correct.

Confirm Technicians for S/O

Confirm technician(s) currently working on this service order for Time Reporting:

Primary Tech Bill

Other Techs Joe

Add a Tech (not selected)

Finish or Not Complete Service Order

When you end the service order via the “Finish” or “Not Complete” buttons the system will:

- Update the Close Date on the service order (if Finished).
- Ask for the next Time Event (default to “Travel”), then generate a Time Event for the tech(s).
- If line items are to be generated, generate a line item per tech for the specified service code (from configuration options) that includes start/stop times. The tech has the option to modify the start/end times to generate the correct labor hours to record. **Changing the labor times affects only the service line items** – the time tracking event time is recorded as the actual time you click the Continue button.

Confirm Tracking Info

Next Action Travel

Primary Tech Bill

Other Techs (none)

Confirm the labor times for this work session:

09/26/16 930 to 09/26/16 1001

Labor Hours .52

Continue

To Pause a Service Order

If you want to temporarily pause work on a service order for a meal or other break and then resume work, you should use the Finish function and select Not Complete. After confirming the Time Tracking info for the work done so far a question asks if you want to leave the service order on the list to resume later. Select OK to leave the item on the list. Select Cancel to change the service order status to the waiting status, which removes it from the current list of pending service orders.