Documentation of ExpandIT Essentials

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1. Introduction

This document will explain how to use the different functionalities of the ExpandIT Essentials BAS-server. To see some of the functions in action our YouTube channel has videos showing how they work step-by-step.

2. Administration
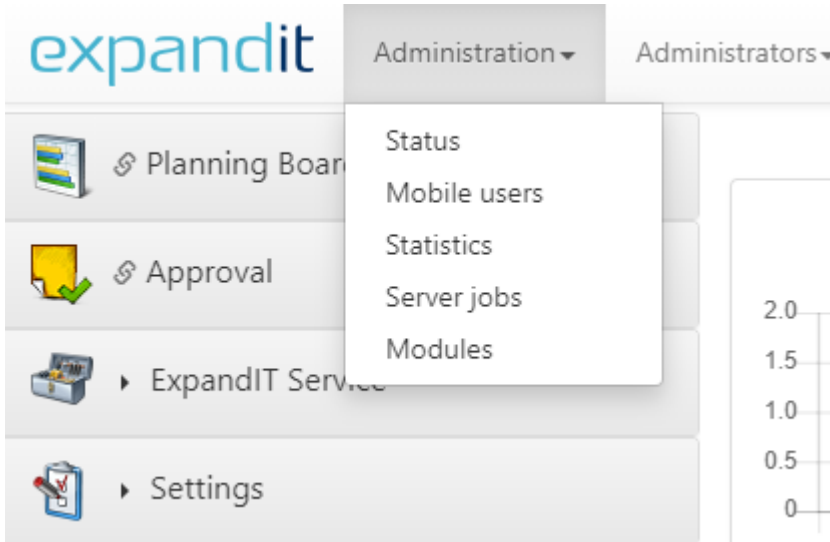
Administration can only be interacted with if the administrator is created with permission access to the Administration tab. The process of giving permission can be read about in *Access Permissions*.

2.1 Status

Status: Latest activities

Todays activity: 10634

Show [All ▼] entries   Search: [   ]

Time	Client ID	Owner	User ID	Runtime version	Device name	
03/22 6:18 PM	11	ExpandIT (for Service3 development)	JAA		10.1.2.38	📱
03/22/2019 2:46:52 PM	10	Timothy Sneath	TS		10.1.2.38	📱
03/22/2019 2:17:09 PM	11029	MVR	MH		172.30.30.134	🌐

Status will show the last time a user performed an activity on either the BAS-server or the service client.

2.2 Mobile users

Mobile users

(74 mobile clients in the system, of which 65 are offline and 9 online only)

Show 10 ▼ entries   Search: [   ]

Client ID	Profile	Description	Owner	User ID	Runtime version		
1	Service Mgt. v2	Default client with us-en settings	ExpandIT BAS	MH	3.0302.471	📱	⛁
2	Sales (DK)	Default klient med dk opsætning	ExpandIT BAS	JR		📱	
3	Inventory (EN)	For Screenshots	OST	MH	2.13	📱	
5	Sales v2.	Sales HTML5 Test script client	ExpandIT BAS	AH		🅮	⛁
10	Service v3.	HTML5 Service	Timothy Sneath	TS		📱	⛁
11	Service v3.	Service v.3	ExpandIT (for Service3 development)	JAA		📱	⛁
80	Service Mgt. v2	RSP - ASP Service 这是一个测试	Robert - Workstation 这是一个测试	TS	3.0302.473	📱	⛁
81	Time v1.	RSP Test device	Robert, Laptop	TS	3.0004	📱	
82	Sales v2.	RSP Test	RSP iPad	TS	3.0003	📱	⛁
83	Sales v1.	RSP iPhone	RSP	PS	2.1502	📱	

Showing 1 to 10 of 74 entries   Previous 1 2 3 4 5 ... 8 Next

⠿ Batch creation   ➕ Add new

From here mobile users can either be updated or created. Click any of the blue text to open the Client details. To add a new user, press the *Add new* button in the bottom right corner. Mobile users are used on the *Service client*.

Client details   ☐ Show details

Client ID:	10
Profile:	[HTML5] Service v3. ▼
Description:	HTML5 Service
Owner:	Timothy Sneath
User:	Timothy Sneath [TS] ▼
Azure/Windows Login:	
Password:	··········
Blocked:	☐

💾 Update

When creating or updating a mobile user this is a picture of the simple view.

2.2.1 Client ID

When creating a new mobile user, the *Client ID* will be generated automatically but can be changed manually. The *Client ID* must be a number.

2.2.2 Profile

The profile defines the kind of user created. In ExpandIT Essentials the mobile user can only be set to a *[HTML5] Service v3.* Profile. This is the standard service client user.

2.2.3 Description

Write a short description of the user e.g. what department the user is a part of.

2.2.4 Owner

Write the name of the user here.

2.2.5 User

Choose the user of the client from the list of users created in Dynamics.

2.2.6 Azure/Windows login

The client can be set up to also use *Azure/Windows login*. A mobile user can only log in with either a username/password combination or *Azure/Windows login*.

2.2.7 Password

Create a password for the mobile user. If an email is entered in the Azure/Windows login field the *Password* field becomes unavailable making it look like this: **Password:** *(password controlled by Windows Login)*

2.2.8 Blocked

While this box is checked the mobile user will not be able to login to the mobile client.

2.2.9 Show details

In the top right corner, a box called *Show details* can be clicked which will give more options when creating or updating a mobile user. The fields will give info about the offline user.

2.2.9.1 Thin client

At the top between *Profile* and *Description* a new field has emerged. Checking this box will remove the off-line functionality of the user.

2.2.9.2 Inventory locations

This option is not available when creating the user but becomes an option when editing the user afterwards. This can be used to assign a default inventory location or restrict which locations are available when registering _Materials_ on the service client.

2.2.9.3 Remaining fields

The remaining fields will show some info about the offline client like the client type and what operating system it uses.

2.3 Statistics

The statics gives the user insights on the data usage, the synchronizations and the inactive user list within a defined period of time.
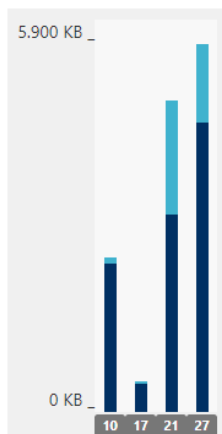
2.4 Server Jobs

Server jobs

	Task	Started	Completed	Status
Run	Run Extraction Receive data from the ERP system	2 minutes ago 04/17/2020 9:55 AM	A few seconds ago 04/17/2020 9:57 AM	Done
Run	Run Injection Send data to the ERP system	A few seconds ago 04/17/2020 9:57 AM	A few seconds ago 04/17/2020 9:57 AM	Done

Server jobs can also be found by clicking on the two arrows in the top right corner
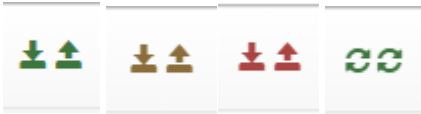
The green arrow pointing downwards shows the status of the extraction while the red arrow pointing upwards shows the status of the injection. The green arrow means it has been under 2 hours since the last extraction/injection. A yellow arrow means it has been between 2 and 4 hours since the last extraction/injection. A red arrow means it has been more than 4 hours since the last extraction/injection. While the extraction/injection is running a green circle will appear.

2.4.1 Extraction

To extract data from Dynamics, click on the button that says *Run* after a little while the text in the Status field will change to *Done*. That means all the changes that are made in Dynamics will now be applied to the BAS-Server. If a new user has been extracted go to *Reference Data* and make sure everything is set up right.

2.4.2 Injection

Injection will send data back to Dynamics such as approved time and finished orders so invoices can be created.

2.5 Modules

Mobile Service

Daily Status Breakdown

(bar chart with categories: Inactive, Accepted, Started, Urgent, Completed; y-axis 0 to 2.0)

Service order type

(bar chart: Undefined ~450, middle ~55, Standard service ~140; y-axis 0 to 500)

Client Statistics

Clients online the last 7 days

(area chart from Saturday to Friday; y-axis 0 to 2.0)

Bandwidth the last 7 days (7,7 MB/2,01 MB)

(area chart from Saturday to Friday; y-axis 0 Bytes to 7.63 MB, with 1.91 MB, 3.81 MB, 5.72 MB marks)

Server time the last 7 days

(area chart from Saturday to Friday; y-axis 0 s to 200 s)

Online activity the last 7 days (5105 hits)

(area chart from Saturday to Friday; y-axis 0 to 4000)

Modules will give a quick statistical update about the activity. It is the same page as the front page when logging in and can also be found by clicking on the ExpandIT logo in the top left corner of the page.

3. Administrators

Administrators can only be interacted with if the administrator is created with permission access to the *Administrators* tab. The process of giving permission can be read about in *Access Permissions*.

3.1 Maintain administrators

Maintain administrators

+ Create Administrator

Show 10 ▼ entries   Search: [   ]

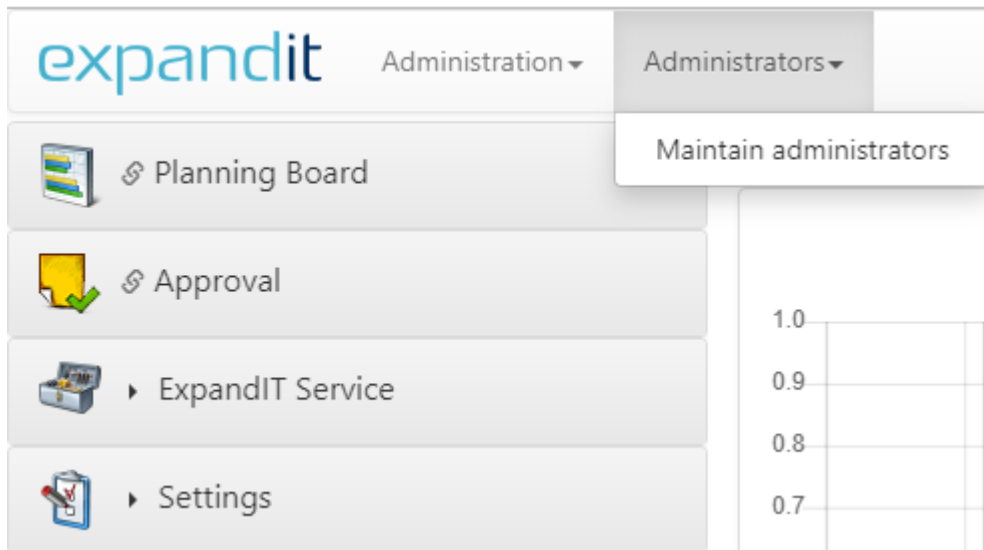| User ID	Name	Linked to user	Language	Last login	
admin	Administrator	-	🇬🇧	03/19/2019 11:31:05 AM	🗑
av	Andy Vidkjær	-	🇬🇧	06/27/2018 2:57:20 PM	🗑
bni	bni	-	🇬🇧		🗑
build	Build daemon	-	🇬🇧	03/21/2019 10:34:47 AM	🗑
cho	Charles Horan	Richard Lum	🇬🇧	05/29/2018 4:28:30 PM	🗑
cws	Casper	Mark Hanson	🇬🇧	02/19/2018 3:44:10 PM	🗑
dlp	Daniel Lopez	Peter Saddow	🇪🇸	08/28/2017 10:08:05 AM	🗑
essentials	Essentials test account	Timothy Sneath	🇬🇧	03/21/2019 9:58:06 AM	🗑
gi	Gerth Isaksen	-	🇬🇧		🗑
hbo	Henrik Bohn	-	🇬🇧	01/18/2019 11:21:25 AM	🗑

Showing 1 to 10 of 24 entries   Previous 1 2 3 Next

Click any of the blue text to see and edit the information and permissions of an administrator. Click on *Create Administrator* to create a new administrator. Click on the red garbage can to delete an administrator.

3.1.1 Create Administrator

Create Administrator []

• Select or deselect access right by clicking the checkboxes.

Login	
Password	
Confirm Password	
User name	
User ID	- Select - ▾
API User	☐
Default Department	- Select - ▾
Azure/Windows account	
E-mail	
Language	<-- Please select --> ▾
Access Permissions	○ Set up manually ⦿ Copy from other administrator
Copy permissions from	-- Select administrator to copy permissions from -- ▾
	Create

3.1.1.1 Login

This is what the administrator will use as User ID on the login screen.

3.1.1.2 Password & Confirm Password

Enter the password twice to confirm the password of the administrator.

3.1.1.3 User name

Enter the name of the user.

3.1.1.4 User ID

Select a user to link the administrator to. This will not influence the login process.

3.1.1.5 API User (need text)

3.1.1.6 Default Department

If the administrator is a part of a department it can be chosen here.

3.1.1.7 Azure/Windows account

Enter information here if the administrator should be able to login with an *Azure/Windows account*.

3.1.1.8 E-mail

Enter the e-mail of the administrator.

3.1.1.9 Language

Select the language of the administrator.

3.1.2 Access Permissions

Select if the administrator should have the same permissions as an already existing administrator or if they should have their permissions set up manually. The *Access permissions* control how much of the BAS-server the administrator will be able to see and interact with.

3.1.2.1 Administration

This permission will enable the *Administration* tab at the top of the screen next to the ExpandIT logo.

3.1.2.2 Administrator Management

This permission enables the *Administrators* tab where administrators are created, updated and deleted.

3.1.2.3 Application Configuration

Adds or removes the *Configuration* option under *Settings*.

3.1.2.4 Modules

Leaving this unchecked will remove the frontpage entirely including the show/hide panel with the menu on the left and only leave the top menu shown.

3.1.2.5 Planning Board

This will add the *Planning Board* option to the show/hide panel at the left-hand side and make it possible for the administrator to create, edit and delete jobs on the *Planning Board*.

3.1.2.6 Planning Board viewer

This will add the *Planning Board* option to the show/hide panel at the left-hand side but will not allow the administrator to do anything besides viewing the *Planning Board*. The options on the *Planning Board* will also be limited to the following:
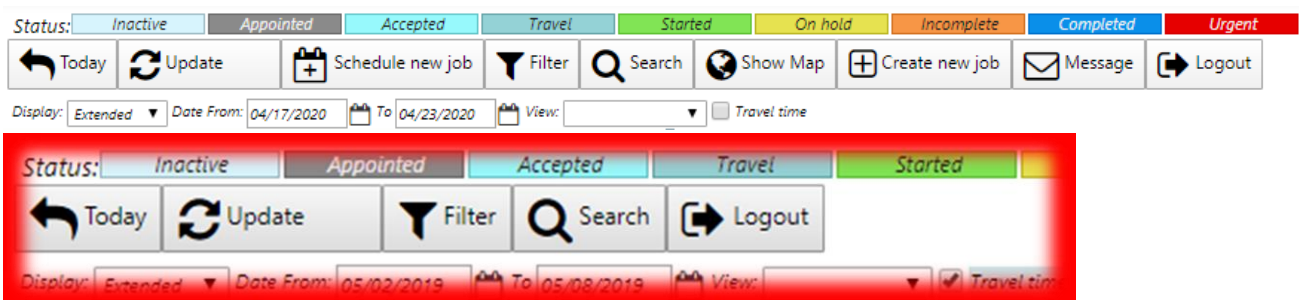
3.1.2.7 User Maintenance

This permission will enable the *Maintenance* tab at the top of the screen.

3.1.3 Departments

The administrator will only be able to see the *Departments* on the *Planning Board* that have a mark in their checkbox.

3.1.4 Modules

The black box contains four out the five menu options for the *ExpandIT Service Module.* The remaining points on the list are submenu options for the four in the black box.

The outsider of this list is the *Approval* in the red box. Approval will show up or disappear from three places.

The first place is the menu option *Approval* that can be seen when logging onto the BAS between *Planning Board* and *ExpandIT Service.*

The second place it can be seen is as the first submenu option of *ExpandIT Service.*

The third and final place is as a submenu option in *ExpandIT Service → Service Order → Approval.*

A recommended administrator will have permissions as seen on the following picture.

Administration	☑
Administrator Management	✔
Application Configuration	☑
Modules	☑
Planning Board	☑
Planning Board viewer	☐
User Maintenance	☑

Departments ☑ Enable all ⚹ Show details...
- ☑ Administration
- ☑ Produktion
- ☑ Salg

Modules ☐ Enable all ⚹ Show details...

ExpandIT Service
- ☑ Company information
- ☑ Resources
- ☑ JobPlanning Log
- ☑ Customers
- ☑ Products
- ☑ Planning Map Location
- ☐ Standard text
- ☑ Order approval
- ☐ Document archive
- ☑ Product lists
- ☑ Languages
- ☐ Service Orders
- ☐ Status Codes
- ☐ Planning [Gantt]
- ☐ Assign Inventory locations to mobile users
- ☑ Report definitions
- ☑ Approval
- ☑ Work types
- ☐ Status Code Flow
- ☑ Service Order
- ☐ Planning
- ☑ Configuration
- ☑ Reference data
- ☑ Message to Mobile Client
- ☑ New Service Order
- ☑ Departments
- ☐ Table Merge
- ☑ Users

Clicking on an already existing administrator to edit them will give the option to edit all the account information as well as their permissions. The login information of the administrator can also be changed by themselves in *Your Account*. The rest of the documentation is written as seen from an administrator with the permissions above.

4. Configuration

After logging onto the BAS-server, *Configuration* can be found by clicking on *ExpandIT Service* followed by *Configuration*. Creation of reports and product lists happens here which can help save time when working on a job.

The amount of options the administrator can see here can be limited by disabling modules as explained in *Modules*.

4.1 Product lists

If the company has a lot of different products the *Product lists* can be used to easily separate those products into smaller categories. Users on the *Service client* can choose these product lists to select materials from.

4.2 JobPlanning log

JobPlanning log

Logged date	Logged on	Logged by	Status	User ID	Type	Guid_X	JobPlanningGuid
03/21/2019 11:05:21 AM (1)	MOBILECLIENT	TS	COMPLETED	TS	USER	EXP00000089	ESSENTIALS-LERJGB6VVX0K5NYNC3GZXSIM1PEZZ9A945D1B6C
03/21/2019 11:05:17 AM (1)	MOBILECLIENT	TS	COMPLETED	TS	USER	EXP00000089	ESSENTIALS-LERJGB6VVX0K5NYNC3GZXSIM1PEZZ9A945D1B6C
03/21/2019 10:58:59 AM (1)	MOBILECLIENT	TS	STARTED	TS	USER	EXP00000089	ESSENTIALS-LERJGB6VVX0K5NYNC3GZXSIM1PEZZ9A945D1B6C
03/21/2019 10:34:04 AM (1)	PLANNINGBOARD	essentials	APPOINTED	TS	USER	EXP00000089	ESSENTIALS-LERJGB6VVX0K5NYNC3GZXSIM1PEZZ9A945D1B6C
03/21/2019 10:33:08 AM (1)	PLANNINGBOARD	essentials	APPOINTED	TS	USER	EXP00000089	ESSENTIALS-LERJGB6VVX0K5NYNC3GZXSIM1PEZZ9A945D1B6C

The *JobPlanning log* can be used to see the history of a job. In the example above a job that has been approved is shown.
The logged date and time of the mobile client registrations can be misleading since the data is only logged when the client is online. If an offline client completes a job the logged time will be whenever the client goes online again.

4.3 Languages
Language List

Only enabled languages will be available on the mobile solutions.

Language is enabled

Language Name	Native Name	Language ID	Language ID (2)	Status
Czech (CS)	Čeština	CS	cs-CZ	Enable
Danish (DA)	Dansk	DA	da-DK	Disable
German (DE)	Deutsch	DE	de-DE	Disable
English (EN)	English	EN	en-US	Disable
Spanish (ES)	Español	ES	es-ES	Disable
French (FR)	Français	FR	fr-FR	Disable
Icelandic (IS)	Íslenska	IS	is-IS	Enable
Polish (PL)	Język polski	PL	pl-PL	Enable
Latvian (LV)	Latviešu	LV	lv-LV	Enable
Nederlands (Nederland)	Nederlands	NL	nl-NL	Enable
Norwegian (NO)	Norsk	NO	nb-NO	Disable
Portuguese (PT)	Português	PT	pt-PT	Enable
Finnish (FI)	Suomi	FI	fi-FI	Enable
Swedish (SV)	Svenska	SV	sv-SE	Disable
Chinese (Simplified) - 中文(简体) (中华人民共和国)	中文(简体) (中华人民共和国)	CN	zh-CN	Disable

ExpandIT Essentials supports several languages that can be enabled and disabled from here. One of the enabled languages can be chosen in *Your account* which is found in settings.

4.4 Planning Map Location

Mobile ID	User	Recorded Time		Set to home	Home address	Latitude	Longitude	
1	Mark Hanson	21-03-2019 09:39:34	🗑	🏠	49 Grahams Road,London N12 5XY	51,5461	-0,0661	📝
2	John Roberts	27-01-2017 09:19:38	🗑			56,2292	10,2395	📝

In case the text on the picture above is hard to read a copy of it can be found below.

NOTE:
This feature will allow you to delete the current map/gps coordinate for a specific Mobile ID or to recover it.
It will not remove the log data but only the current position (which is what the Planning Map shows).
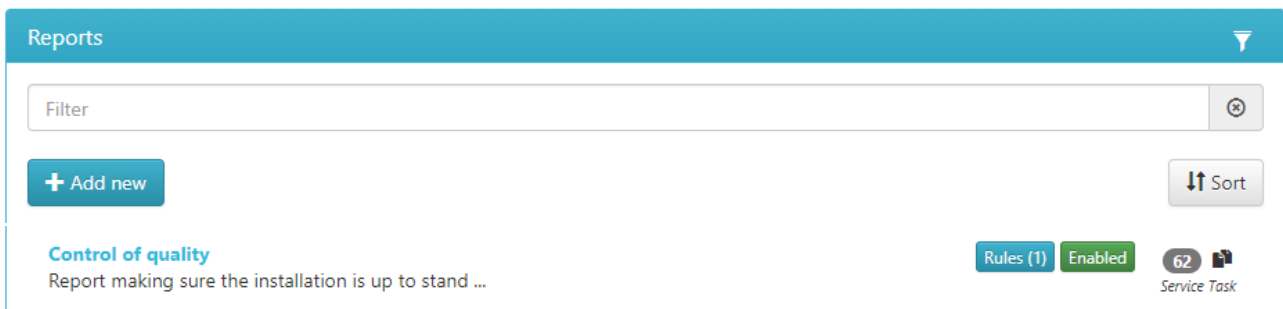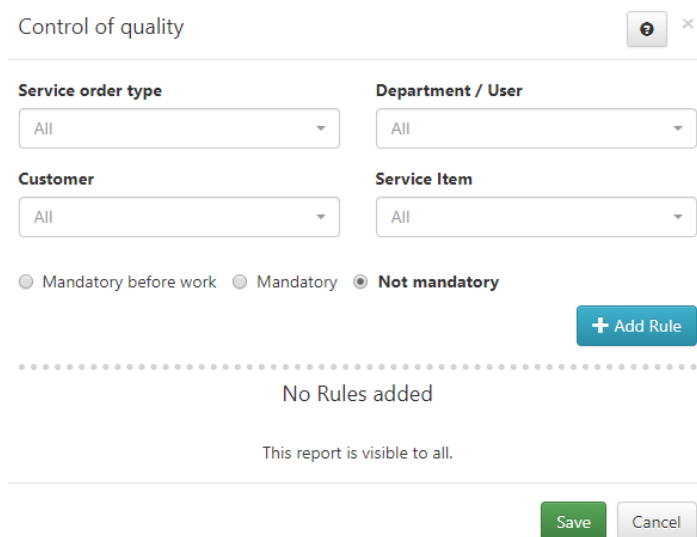This last known position can be recovered from the log data.

🗑 Delete the current coordinate, which will result in the Mobile ID disappearing from the Map.

♻ Recover the last coordinate from the log, which will put the Mobile ID back on the Map.

❌ There is no recovery data available for this Mobile ID. Probably because the Mobile ID does not use the location service.

🏠 Set the current location to home.

📝 Edit Latitude & Longitude for this Mobile ID. Use this to place a Mobile ID on a specific location on the map.

4.5 Report definitions

Creating reports is a great way to make a checklist for the employees to make sure that the completed work lives up to a certain standard. Reports are available to complete on the *Service client* as soon as they are marked *Enabled*. Reports created can be made mandatory so a job/service order cannot be finished without the report being finished.

Furthermore dynamic reports can have a set of rules activated for quality control purposes.

Reports can be set to mandatory, mandatory before work or not mandatory for each of the following criteria, or a combination of the following criteria: service order type, department / user, customer and/or service item.

4.6 Work types

Work types

Code	Description	Unit of Measure	Auto-create from ⓘ	Exclude from total ⓘ	Hours ⓘ	Travel ⓘ	Other ⓘ
MILES	MILES	MILES	▼	☐	○	◉	○
NORHOUR	Normal hours	HOUR	▼	☐	◉	○	○
OVERT100	Overtime 100%	HOUR	▼	☐	◉	○	○
OVERT50	Overtime 50%	HOUR	▼	☐	◉	○	○
PARTTIME	Part time	HOUR	▼	☑	◉	○	○
REGHOUR	Regular hours	HOUR	▼	☐	◉	○	○
TRAVEL	Travel	KM	▼	☐	○	◉	○

Showing 1 to 7 of 7 entries

↻ Update (From ERP)

4.6.1 General

Work types comes from Dynamics and are imported to the BAS-server by clicking on the *Update (From ERP)* button. The *Code, Description* and *Unit of Measure* fields are automatically filled with information from Dynamics. Read more about where the information is entered in Dynamics in Appendix XX.

4.6.1.1 Auto-create from

Defines which status code the work type is tied to when auto creating time registrations via start/stop on the *Service client*.

4.6.1.2 Exclude from total

Marking a work type as excluded means, that it will not be included in the hour summaries in both the TIME and *Service client*.

4.6.1.3 Hours

Marking a work type as hours means, that the quantity will be formatted as hours in both the TIME and *Service client*.

4.6.1.4 Travel

Marking a work type as travel means, that boxes for adding registration number, start address and finish address will be available for the user in the TIME client.

4.6.1.5 Other

Marking a work type as *Other* should be done when neither *Hours* nor *Travel* applies.

4.6.2 Users

Here it can be set up so different users have access to different work types in case not all work types are relevant for all users.

4.6.3 Projects

Just as not all users need the same work types different projects can be assigned different work types.

5. Reference data

Reference Data works as the link between the BAS-server and Dynamics. Here everything extracted from Dynamics will appear and can be edited. Editing through *Reference Data* is not recommended since everything extracted from Dynamics the next time will overwrite the existing data in *Reference Data*.
To learn more about how, what and where please read Appendix XX.

The amount of options the administrator can see here can be limited by disabling modules as explained in *Modules*.

6. Planning Board

Click on the option called *Planning Board* on the Show/Hide panel to get to the *Planning Board*.
Each colored rectangle on the *Planning Board* is a job and the different colors represent the statuses of the jobs which are explained in *Job Status*.

6.1 Today

It is possible to change how many days the *Planning Board* is showing by changing the dates in the boxes marked on the following picture.

If the timeframe is set to an amount of days greater than what the browser can show, a scroll bar will appear at the bottom of the screen allowing for planning and seeing already planned jobs in the future. By clicking on *Today* the *Planning Board* will automatically jump back to today even if the *Date from* is set to a day in the future.

6.2 Update

The *Planning Board* updates automatically every 3 minutes but can be updated manually to see if any changes are made by other users. To apply any *Date From* and *Date To* changes the *Update* button must be pressed.

6.3 Schedule new job

Click this button to quickly and easily schedule an existing unplanned job.
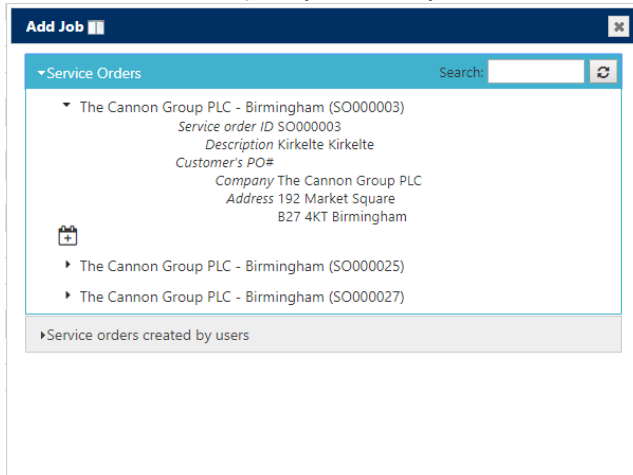

6.3.1 Service Orders

Choose between service orders created from Dynamics. The *Service Orders* can be dragged onto the *Planning Board* for a quick planning. Press the arrow to the left of the order to see more information about the job. While the job is expanded click on the symbol with the calendar to open the job planning window. Read more about the job planning window in *Create new job*. Previously planned service orders that were deleted before completion will show up here.

6.3.2 Service orders created by users

Expanding this panel instead of the *Service Orders* panel will not show the jobs created from Dynamics but instead show unplanned jobs from the *Create new job* button. Jobs that were placed on the *Planning Board* but then deleted before completion will also end up in this box. The jobs are planned by dragging them onto the *Planning Board*.

6.4 Filter

In the case that some of the employees or jobs on the *Planning Board* are redundant to an administrator it is possible for every administrator to filter out any employee. When changing the view of the *Planning Board* it gets updated by clicking the *Update* button at the bottom of the pop-up window.
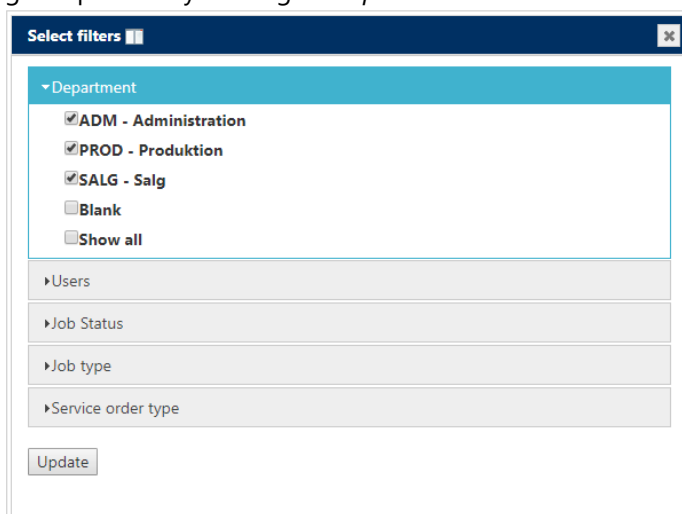
6.4.1 Department

Check or uncheck the boxes to choose if the department should be visible on the view. If all the departments should be on the view, then check the box *Show all* to automatically check all boxes. Removing a department also removes all the users attached to that department even if their individual boxes are checked.

6.4.2 Users

Check or uncheck the user boxes to remove or add individual users. If only one user is needed from a department uncheck the boxes of the other users in the department. The users are listed alphabetical and not by department.

6.4.3 Job Status

If there is a lot of jobs with a specific status cluttering up the *Planning Board* then remove them with a filter and have another filter where they are visible. Works well as a temporary filter to get an overview.

6.4.4 Job type

Choose to filter out either *Service Orders* or *Service orders created by users*.

6.4.5 Service order type

The option of filtering by service order type is useful when a lot of specific types of jobs are crowding the *Planning Board*.

6.4.6 Confirming the filter

Click on *Update* when the filter is set.

6.4.6.1 Temporary view

If the view is temporary nothing else should be done now. This view will stay until another one is chosen, *Clear filters* is pressed or until the next logout. Useful when a quick overview is needed.

6.4.6.2 Save a view

To save the view press the blank drop-down box which can be found beneath the *Search* button and to the right of the date selection. The *Display* box will appear after clicking *Edit views*.
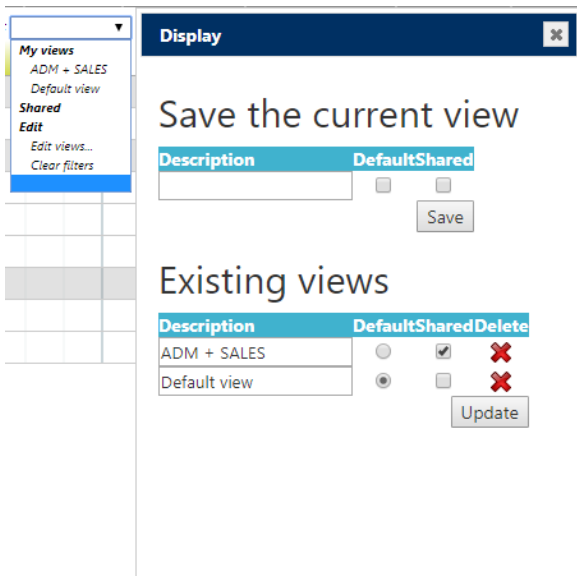
My views

This is where the user can find already saved views.

Shared

Here the user can select a view that another user has shared. In this example there are no shared views.
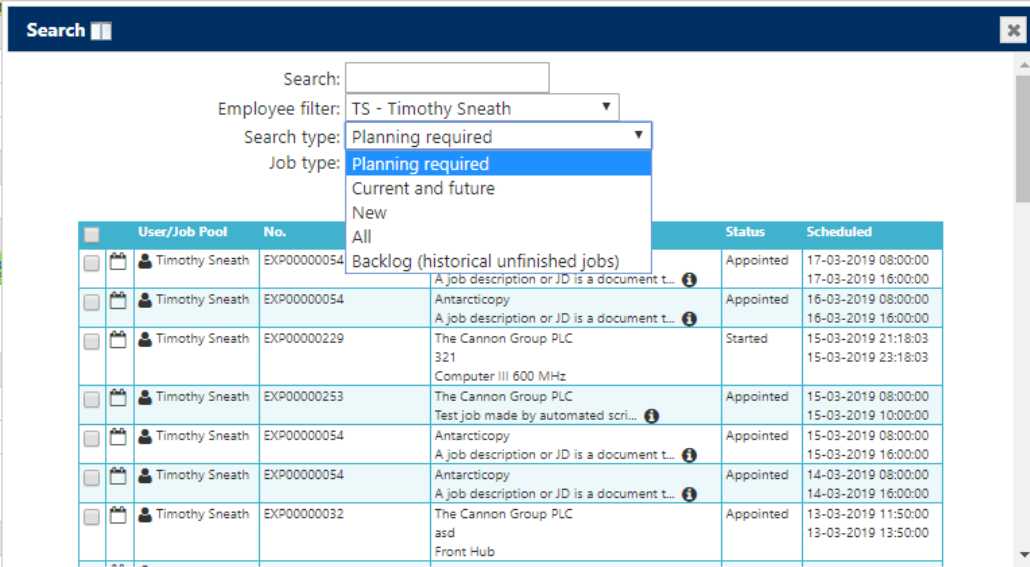
Edit

Click on *Edit views* to get the display box to appear. Enter a description/name of the view and choose if it should be the default view and/or a shared view and then click *Save* when the choices are made. Default view will be how the *Planning Board* looks like every time the user log in. A shared view can be seen and selected by other users. It is also from here a user can delete views by clicking on the red button.

Clicking on *Clear filters* will remove any current filters. This will not delete the filter if it is saved.

6.5 Search

The *Search* function gives the opportunity to search for jobs and service orders based on different parameters.
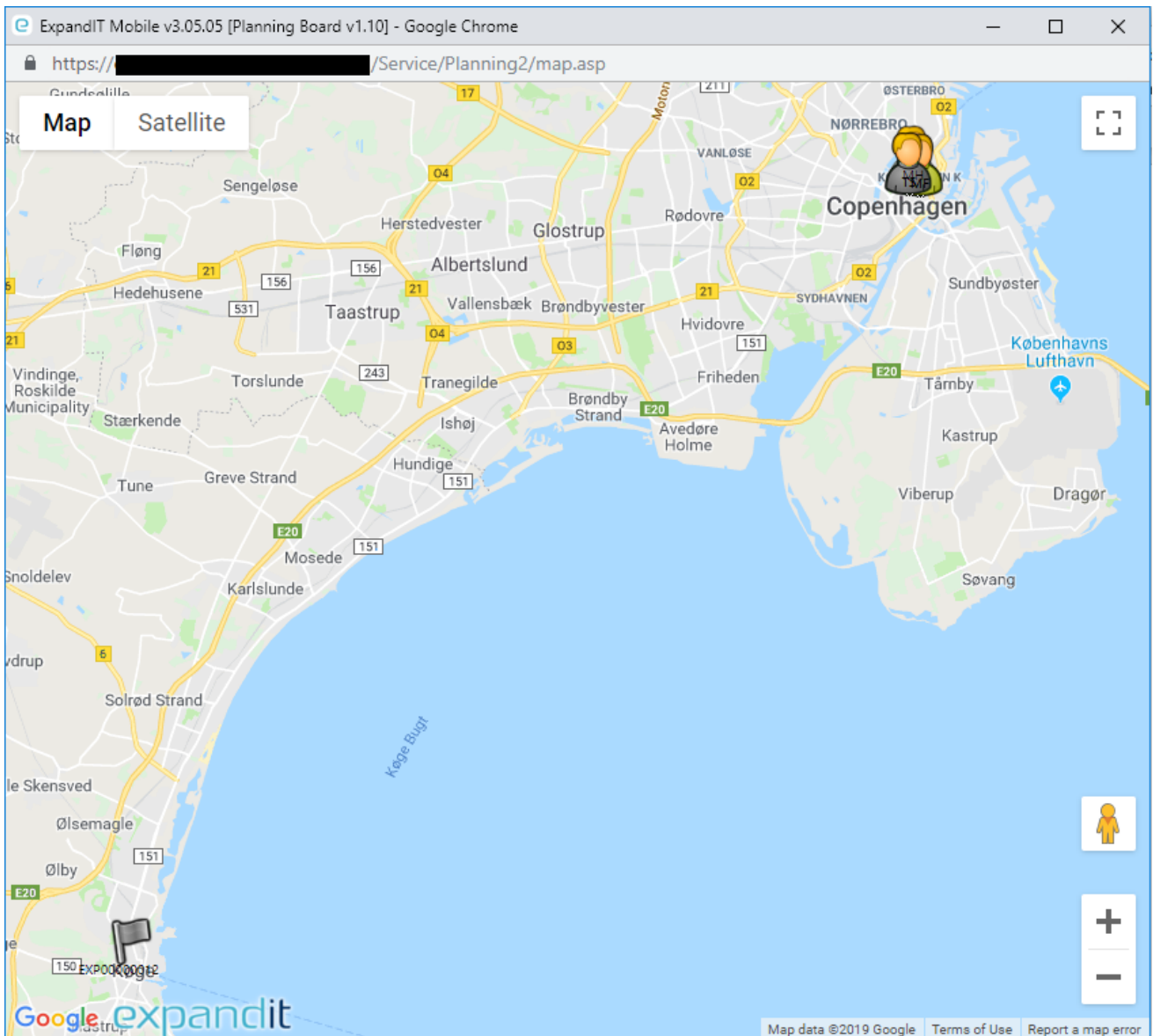

The first option is searching for keywords or numbers in the jobs/service orders.
To narrow down the results of the search it is possible to choose either an employee or a department.
Search type defines when the job/service order is planned to make it easier to filter out anything unnecessary.

6.6 Show Map

Show Map will open a new pop-up browser window of google maps. Any users or jobs visible on the *Planning Board* will also be visible on the map. Reasons why users or jobs are not visible on the *Planning Board* can be because of a filter or a date-range. The users and jobs visible on the map can be interacted with to plan jobs.

ExpandIT Mobile v3.05.05 [Planning Board v1.10] - Google Chrome

https://   /Service/Planning2/map.asp

Map   Satellite

User: -
Status: Appointed
Start: 24.04.2019 12:30:00
Finish: 24.04.2019 14:30:00

Lauritzen Kontormøbler A/S
Køge, 4600
Appointed
Change location
Route from...
Route to...

Available jobs nearby:

Users nearby:
21,8 mil - (5) TS - Thomas Søndergaard
21,8 mil - (7) TS - Thomas Søndergaard
21,9 mil - (2) MH - Martin Hansen
21,9 mil - (1) MF - Mette T Djørup
21,9 mil - (6) MF - Mette T Djørup

User: Thomas Søndergaard
User ID: 7
Updated: 11.04.2019 11:36:31
Speed: 0,0 mph
Route from...
Route to...
Show trace...

Available jobs nearby:
21,8 mil - Service Order EXP00000012: (Project JOB00010) Sh...

Users nearby:
0,0 mil - (5) TS - Thomas Søndergaard
0,2 mil - (2) MH - Martin Hansen
0,2 mil - (1) MF - Mette T Djørup
0,2 mil - (6) MF - Mette T Djørup

6.6.1 Change location

If the work address is entered wrong when creating the job, it can be changed by clicking on *Change location* and entering the right address instead. The map also displays an *Unknown locations* message in the top right corner if the location cannot be found.

6.6.2 Show trace

If a user is selected instead of a job the *Change location* option is replaced by *Show trace* which shows the user's route throughout a selected day as well as showing the current speed of the user above *Route from*.

6.6.3 Route from & Route to
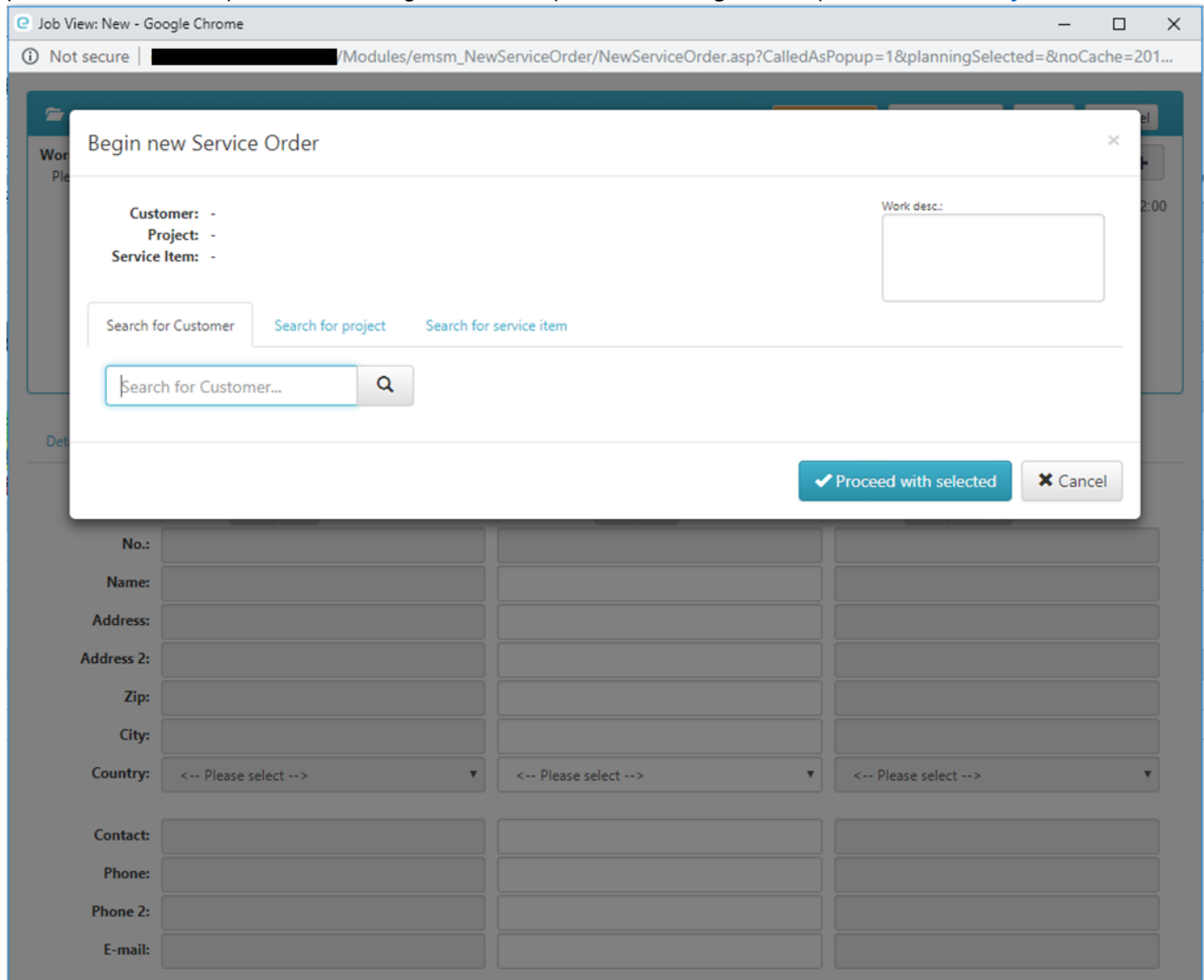
Selecting a user or job and clicking *Route from* and then clicking on another user or job and selecting *Route to* will show the shortest route between the two destinations.
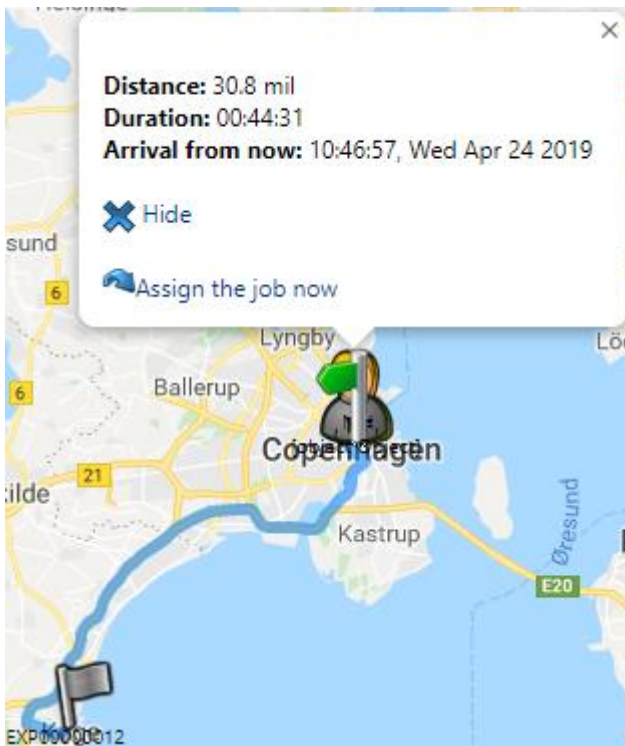
As it can be seen the distance, duration and arrival time will be calculated. Selecting another job/user and clicking *Route from/Route to* will show a new route for easy comparison of routes. If a user is paired with a job the *Assign the job now* button will appear. This will move the job to the employee on the *Planning Board*.

6.7 Create new job

Clicking this button will open a new window making it possible to create a service order that can either be planned so it ends up on the *Planning Board* or unplanned making it end up in *Schedule new job*.

6.7.1 Begin new Service Order

When creating a new job this is the first window that will pop up. Selecting a customer and going to the *Search for project* tab will show all projects attached to that job. Next step is to select a service item. If a project was selected it will only show service items attached to the project. If a project was not selected it will show all service items from the customer. Before clicking *Proceed with selected* the work description field needs to have text in it. Alternatively click *Cancel* and setup the job 100% manually.

6.7.2 Details

In the *Details* tab the work description can be changed as well as some other minor changes. To change the color of the job on the *Planning Board* and giving it a higher priority make a checkmark in the *Urgent* box. Giving a service order type can be a good idea as explained in *Filter*.
Click on the blue bar at the top of the screen to either show or hide the information in that box.

6.7.3 Customer

If the work address differs from the customer address it can be changed here or in the *Show map* feature. A different invoice address can also be chosen. The button next to the magnifying glass in the customer field creates a new customer. For the *Work Address* and *Invoice to* fields the create button is replaced by a *Same as customer* button which will copy the lines from the customer field.
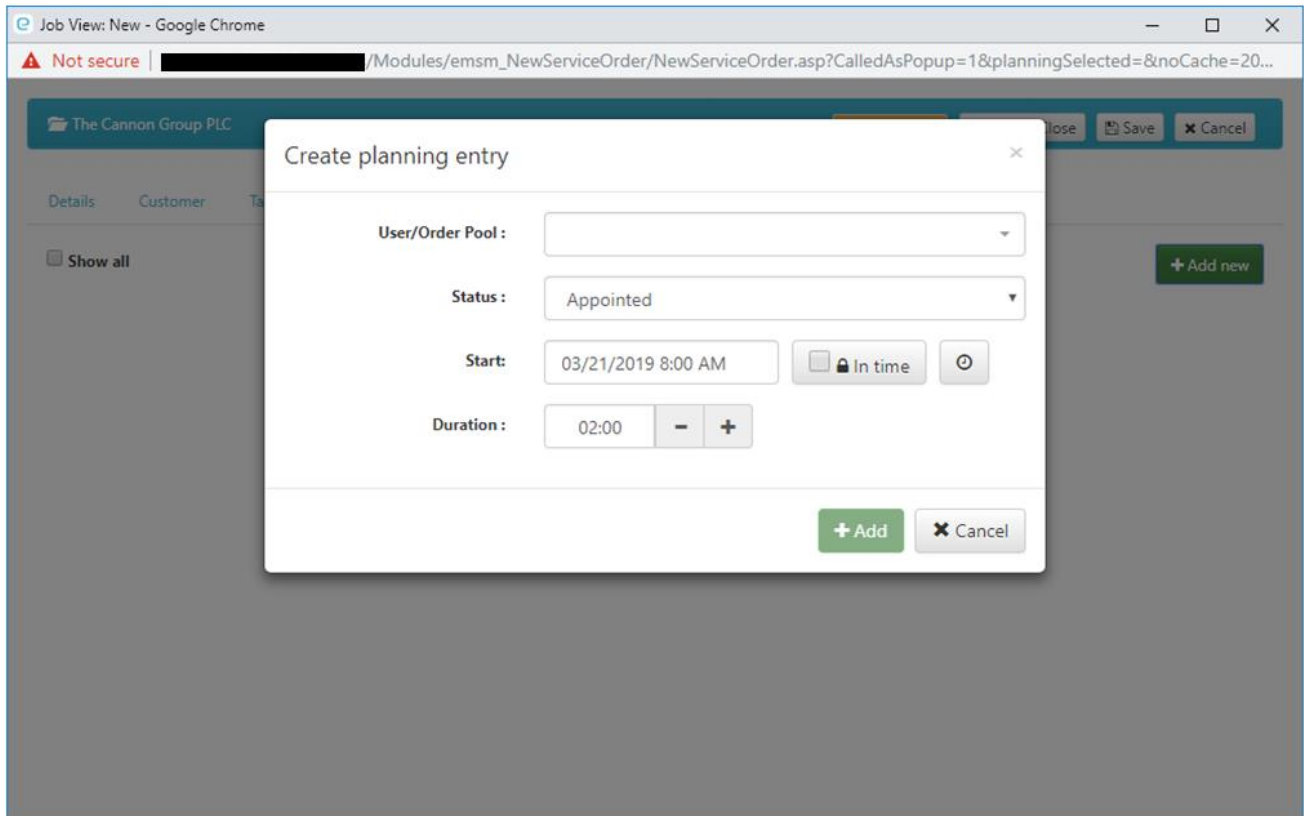
6.7.4 Tasks

In the *Begin new Service Order* window only one service item can be chosen. If more service items need to be chosen, go to the *Tasks* tab and press *Add new*. From here service items can also be deleted from the job by clicking on the red garbage can. If the service item has been moved since the last time it received service or it is the first time the employee is at the customer a location can be entered to help.

6.7.5 Planning

After a customer, project and service item has been selected in _Begin new Service Order_ and _Proceed with selected_ has been clicked the _Planning_ tab is the first to be shown. Click on _Add new_ and the pop-up window on the picture will appear. Choose a user or an order pool to plan the job for. The job status can be changed to urgent and by clicking on the clock icon it will be moved to the current time to make it visible to the employee it is getting planned for that it is a priority job. If the job is not urgent it can be planned by clicking in the date field. The lock in time button is for jobs where the customer requests a specific time and when the button is pressed the job will not be able to move horizontally on the _Planning Board_ and only vertically between users. Finally choose the duration of the job and press _Add_. Multiple planning entries can be made if it is a job that requires multiple people.

6.7.6 Comments
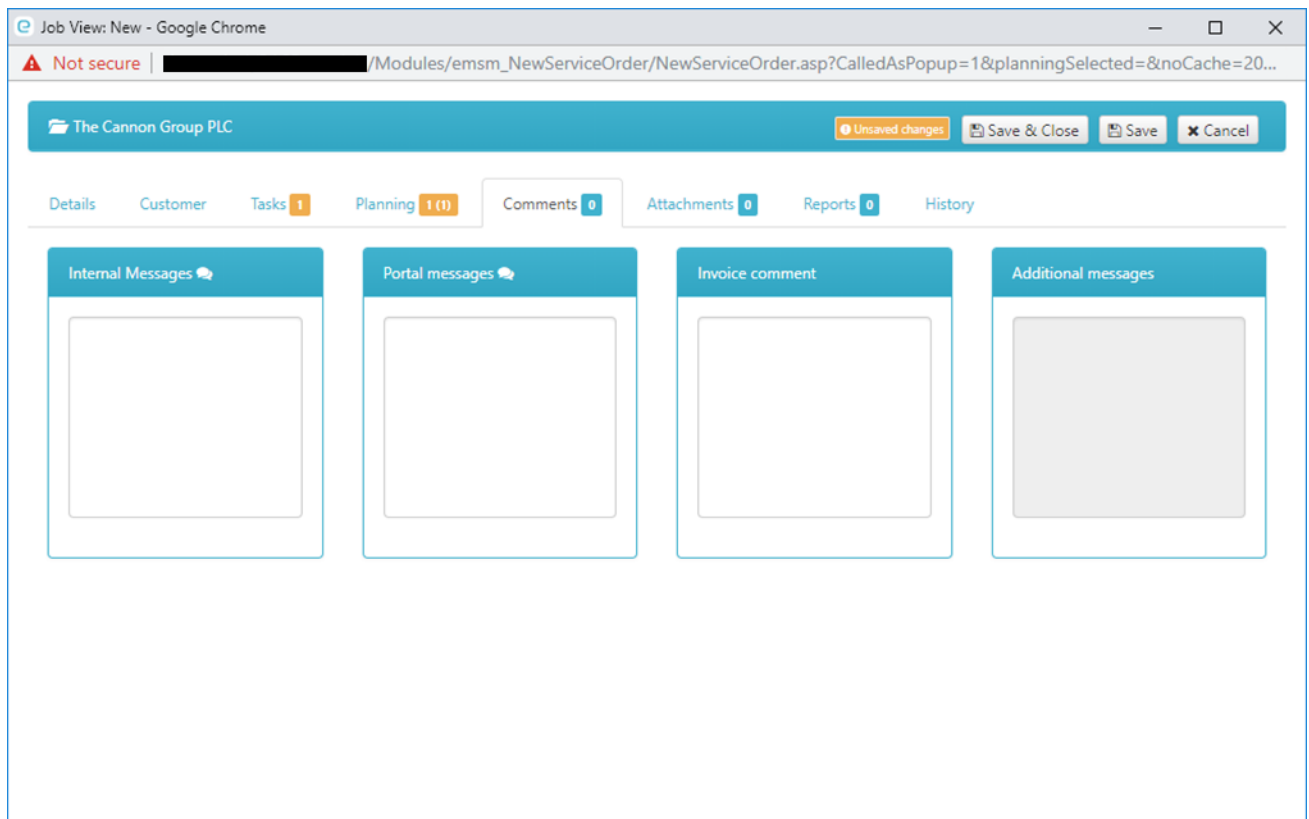
When working on a job communication is an important element. *Comments* make it possible to write messages to both the employee working on the job and the customer.

6.7.6.1 Internal Messages
This field makes it possible to write messages internally with the employee working the job. These messages will show up on the service client and cannot be seen by the customer.
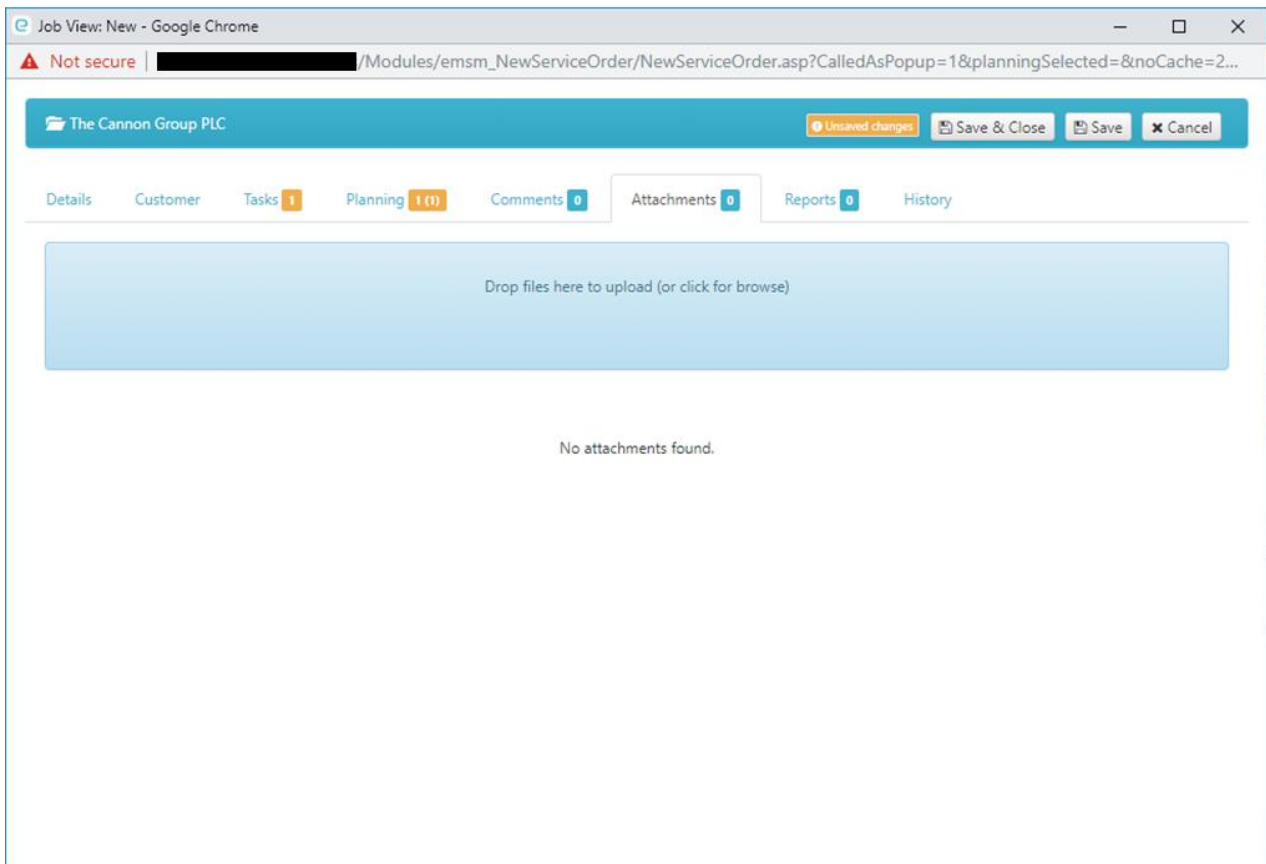
6.7.6.2 Portal messages
If the customer has an ExpandIT service portal they can send as well as receive messages through this field.

6.7.6.3 Invoice comment
Here a message for the invoice can be written. This message can later be changed even after the job is finished and up until the job is approved.

6.7.7 Attachments

In the *Attachments* tab a user can upload documents and pictures with relevance to the job so it can be seen on the service client. Documents and pictures uploaded from the service client will also show up here.

6.7.8 Reports
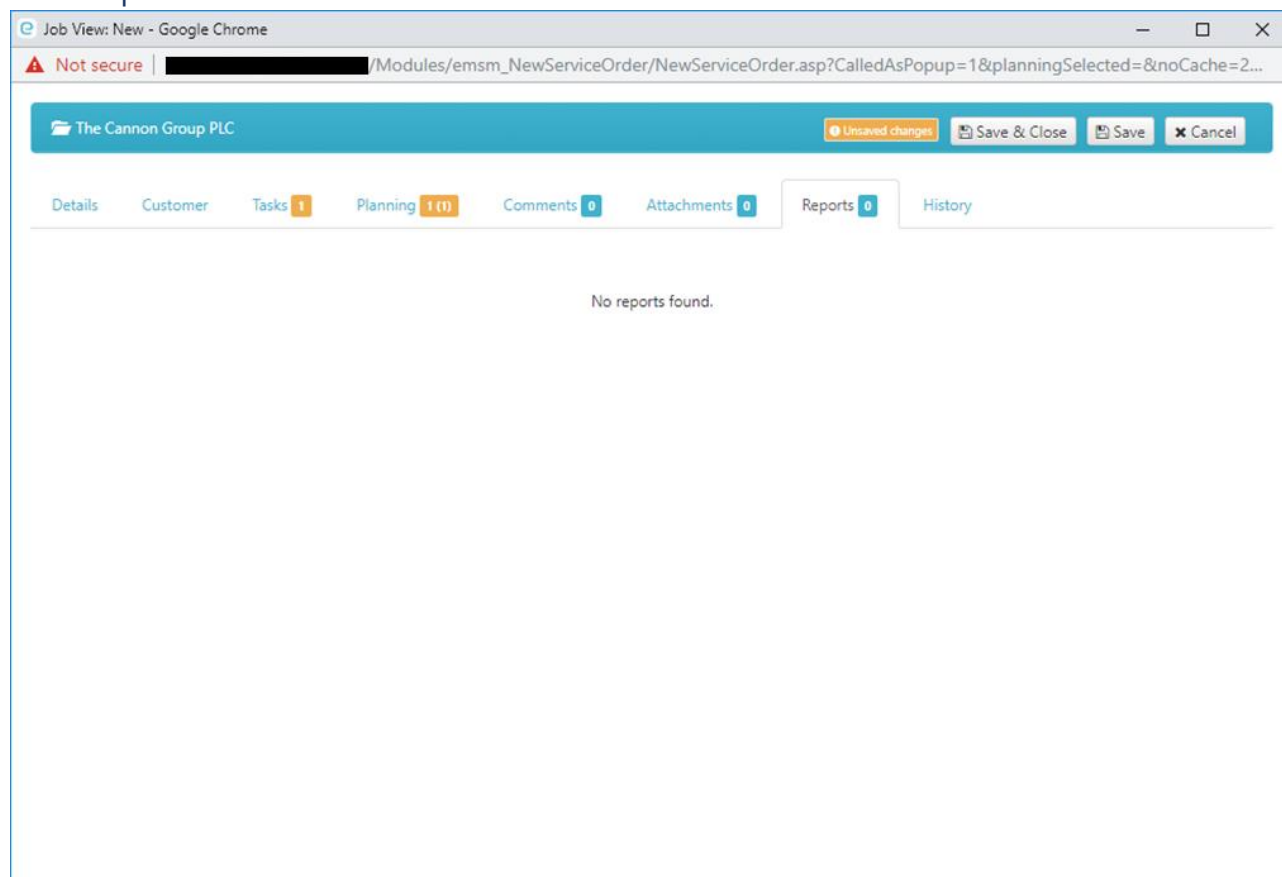
This tab is not relevant when creating the job since it shows reports completed from the service client and the job needs to be planned before it appears on the *Service client*.

6.7.9 History

Here the old service orders, comments, reports and materials registered on the same customer can be viewed. When viewing the history, the old reports can be clicked on to be viewed fully. If there is something important to remember when working on a service item, the specific service item can be searched for and the comments as well as used materials can be seen.

6.7.10 Complete the order

To complete the creation of the order, click on *Save & Close* and the order can now be seen on the *Planning Board* where it was planned to. If there was not chosen a job pool or employee, the job can be found in *Service orders created by users*.

6.8 Message

If an employee and/or a customer needs to get some information about a job the *Planning Board* message feature works as a good way to give that information. The message can be sent to a phone number, e-mail or directly to the *Service client*. It can be sent to multiple of those medias at the same time.

When selecting who the recipient(s) of the message is/are there are two fields. The top field is a text field dedicated to phone numbers and e-mail addresses and can fit multiple of those. The bottom field is a drop-down menu consisting of the departments and employees on the *Planning Board*. The drop-down menu can also fit several employees. Send the message to either a whole department, multiple employees or a single employee and it will appear on the service client. The subject of the message will be shown both on the e-mail and on the service client but will not appear on the SMS message. *Active from* and *Active to* is only relevant when sending a message internally. *Active from* defines when the message will be shown on the *Service client* while *Active to* determines when the message will be deleted. If no date is chosen in the *Active to* field the message will be available until manually deleted. Last thing to do is writing a message and pressing *Send*.

6.9 Right click job

On the *Planning Board* a job can, be right clicked to give more options.
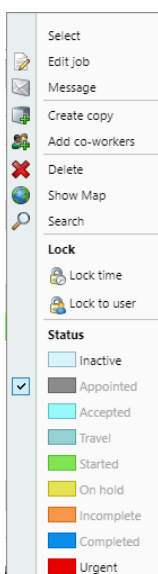
6.9.1 Select
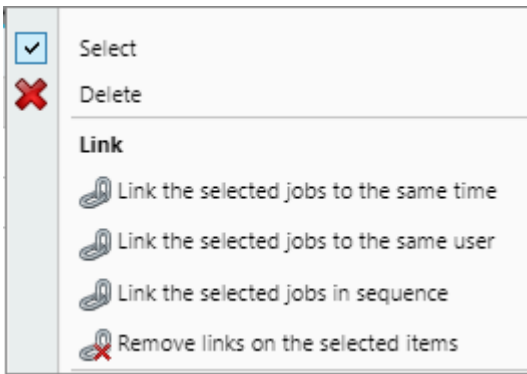
While two or more jobs are selected and one of them is right clicked a new set of options becomes available. Holding left click and marking multiple jobs will automatically *Select* them.

6.9.1.1 Delete

Clicking *Delete* will first make a confirmation alert appear that needs to be accepted before deleting the selected jobs. Deleting a job will remove the job from the *Planning Board* but it can still be found when clicking *Schedule new job*.

6.9.1.2 Link the selected jobs to the same time

Selecting this option will make the other selected jobs move to the starting time of the job that was right clicked. The jobs do not have to be planned to the same user.

6.9.1.3 Link the selected jobs to the same user

Selecting this option will make the other jobs move to the same user. The jobs will move to the user whose job was right clicked while staying at the same time and date they were before the linking.

6.9.1.4 Link the selected jobs in sequence

Selecting this option will not make the jobs move themselves however when one job is moved manually the other will move the same distance automatically.

6.9.2 Link
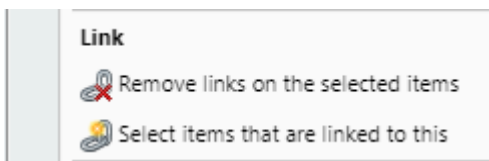
When right clicking a job that is linked, two new options will appear between the *Lock* and *Status* options.

6.9.2.1 Remove links on the selected items

This option removes the link on the selected items.

6.9.2.2 Select items that are linked to this

Clicking this option will select all jobs linked to the job that is being right clicked.

6.9.3 Edit job

Clicking this option will open the same window as *Create new job* but since the job already is planned the first page that opens will be the *Details* tab. Double clicking a job with the left mouse button will also open this window.

6.9.4 Create copy

Creating a copy will copy everything of the selected job and the copy will appear at the same planned time and on the same user.

6.9.5 Add co-workers

Select one or more co-workers from the pop-up and choose to link the job to the same time or not. When clicking *Update* exact copies of the job will be created on the timeline(s) of the selected co-worker(s).

6.9.6 Delete

Deleting a job will remove the job from the *Planning Board* but it can still be found when clicking *Schedule new job*. Multiple jobs can be deleted at the same time as explained in *Delete*.

6.9.7 Show Map

This option works the same way as the *Show Map* button on the *Planning Board*. The benefit of right clicking on the job beforehand is that the job will be pre-selected when the map window opens.

6.9.8 Search

The *Search* option opens the search box already filled out so any copies of the job can be seen even if it has been filtered away.

6.9.9 Lock time

Locking a job to the time is a smart way to deal with jobs that have deadlines. This way the job can only be moved vertically between users and not horizontally on the timeline.

6.9.10 Lock to user

Locking the job to a user is smart if the specific user is the only one who has the tools for the job. This works opposite of locking the time and can only be moved horizontally.

6.9.11 Status

Depending on what status the job has when being right clicked it may be able to have its status changed.

7. Service client

ExpandIT Mobile v3.05.05
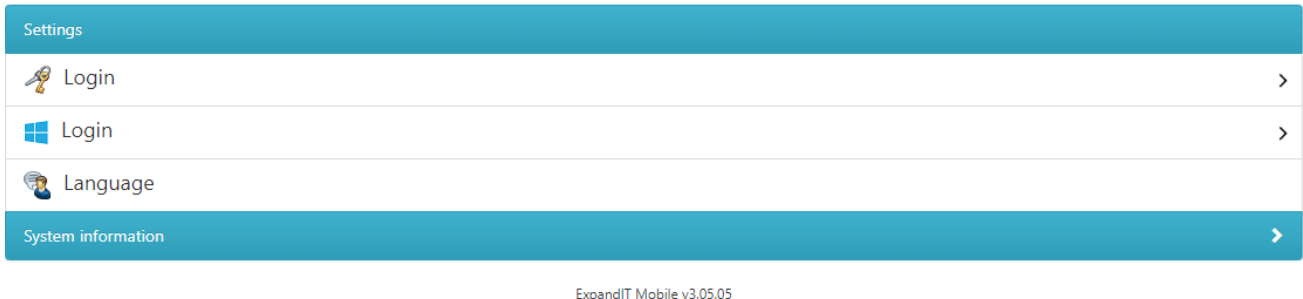
Login

The first login option is to login with the username and password created when creating the account in *Mobile users*. If a user is setup with an Azure/Windows account this login option cannot be used.

Login

The second login option is to login with Azure and can be used if an Azure/Windows account was setup when creating the account in *Mobile users*.

Language

Change the language of the client.

ExpandIT Mobile v3.05.15
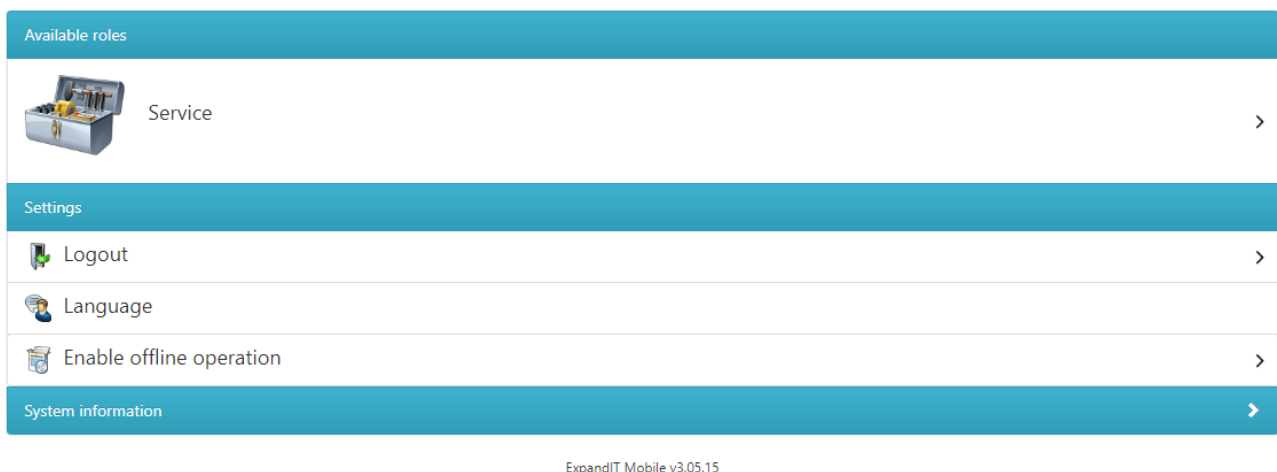
The *Service client* is where an employee can register the time and materials they use working on jobs. The picture above shows what it looks like after the employee has logged in.
This is also where the employee is directed when clicking the *Settings* button while in the main menu.
If the user is not logging in with Azure and has forgotten their password it can be changed from the BAS.

Logout

Clicking this button will redirect the employee to the login page.

Change password

The password can be changed from the client. Enter your own password once and the new password twice (min. 4 characters).

Language

Change the language of the client.

Enable offline operation

This downloads and creates a local database for offline usage of the service client.

System information

Shows the *System information* when clicked.

7.1 Overview
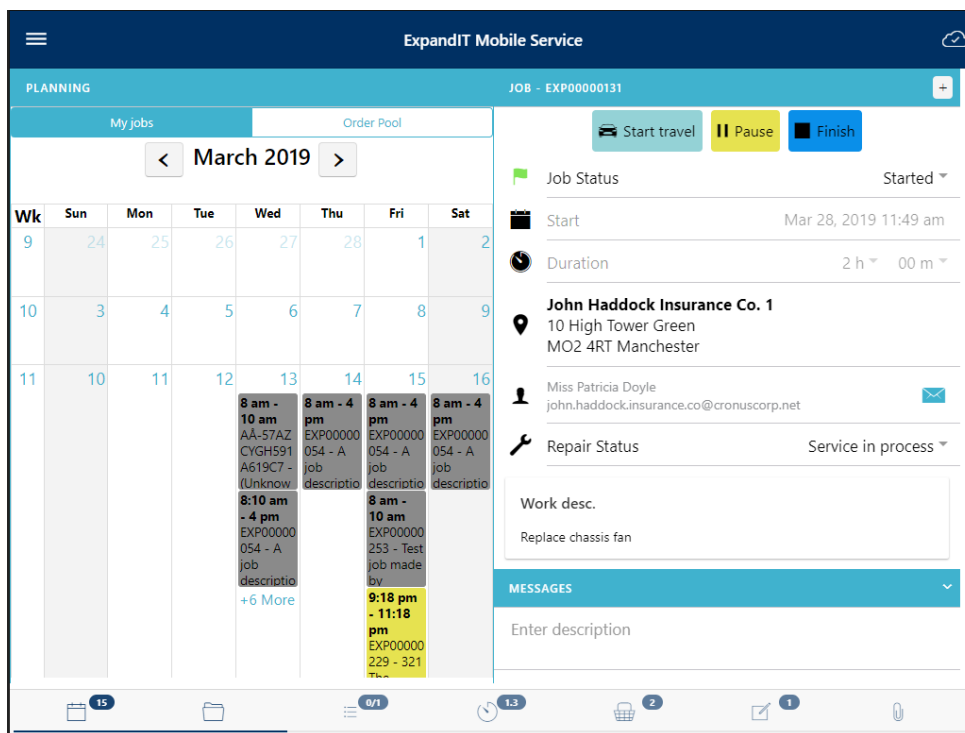
This is how the *Service clients* overview looks like after logging in. The *Overview* shows the calendar and job window. The symbol in the top right corner, means that the client is updated while the symbol in the top left corner symbol is the main menu. At the bottom of the screen the different job tabs can be seen and a dark blue line below those tabs will show which ones are currently visible on the screen.

The rest of 8.1 will focus on the tabs at the bottom in order from left to right.

7.1.1 Planning

At the top it can be chosen if the *Planning* tab should show the employees directly assigned jobs or the jobs from the order pool. On the pictures above the list view is shown first and the calendar view next to it. The status of the jobs is shown with the same colors as on the *Planning Board*. Clicking a job will make it interactable in the *Job* tab.

7.1.2 Job

7.1.2.1 Start travel

Clicking on this will change the color of the job on both the *Planning Board* as well as the *Planning* tab so the users planning jobs can see the employee is on the way to the job.

7.1.2.2 Pause/Start

Before the job has been started it will only show *Start travel* and *Start* at the top. Clicking on *Start* will make the *Pause* button appear. Clicking on either of the buttons will change the *Job Status* and the color of the job.

7.1.2.3 Finish/Start

The *Finish* button will also only appear after the job is started. Clicking on *Finish* should only be done when either the job is done, or it is the end of the day and both time and materials are registered. The process of finishing a job is described in *Finish job*.

7.1.2.4 Job Status

Started job

When on a started job and clicking on *Job Status* the picture above shows the options to chose from.

Started means the job is started.
Travel means the employee is on the way to the job.

On hold means the employee is taking a pause from the job.
Incomplete means the employee has finished the job but did not complete all tasks.
Completed means the job is done.

Appointed job
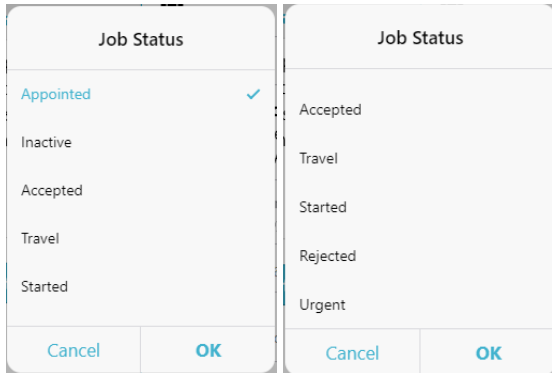
When on a job which status is appointed and clicking *Job Status* the two pictures above show the options.

Appointed means the job has been planned to an employee.
Inactive means the job right now is planned but it cannot be seen on the service client.
Accepted means the employee has accepted the planned job.
Rejected means the employee has rejected the planned job.
Urgent means the job has priority over other planned jobs.

7.1.2.5 Start
Here the employees can reschedule the job themselves. Not to be confused with the button that starts the job.

7.1.2.6 Duration
This is the expected duration of the job. If an employee arrives at the costumer and can see the expected duration the planners have set is either too long or short, it can be changed here by the employee. This will also change the length of the job on the *Planning Board*.

7.1.2.7 Location
The work address can be seen here. Clicking on the car will give a route from the employee to the work address

7.1.2.8 Customer
Here the customer can be seen. Clicking on the letter will open the mailing program so a mail can be sent to the customer. Clicking the phone will call the number of the customer. All this information comes from the *Customer* tab when planning the job.

7.1.2.9 Repair Status

Repair Status can either be changed on the job or on the task. The *Repair Status* of the job will not be seen on the *Planning Board*.

7.1.2.10 Linked

If the job is linked to a co-worker this will be visible. Clicking on it will give the option to both call and write to the co-worker.

7.1.2.11 Work desc.

Here the work description can be viewed.

7.1.2.12 Messages

These messages work the same way as already described in *Comments*.

7.1.3 Tasks

The *Tasks* tab shows the tasks planned on the job. If there is only one task it looks like the picture to the left with more info while it looks like the picture to the right if multiple tasks are planned.

7.1.3.1 History

Clicking on *History* will show the service history. A filter can be set to find a specific task.

If a task was active while *History* is being clicked it will automatically add that task to the filter.

Orders, tasks, comments, reports and material registrations can be viewed from here.

7.1.3.2 Add

Clicking on the + on the blue bar next to *History* will add another task. Press *Select* to choose a service item.

7.1.3.3 Task
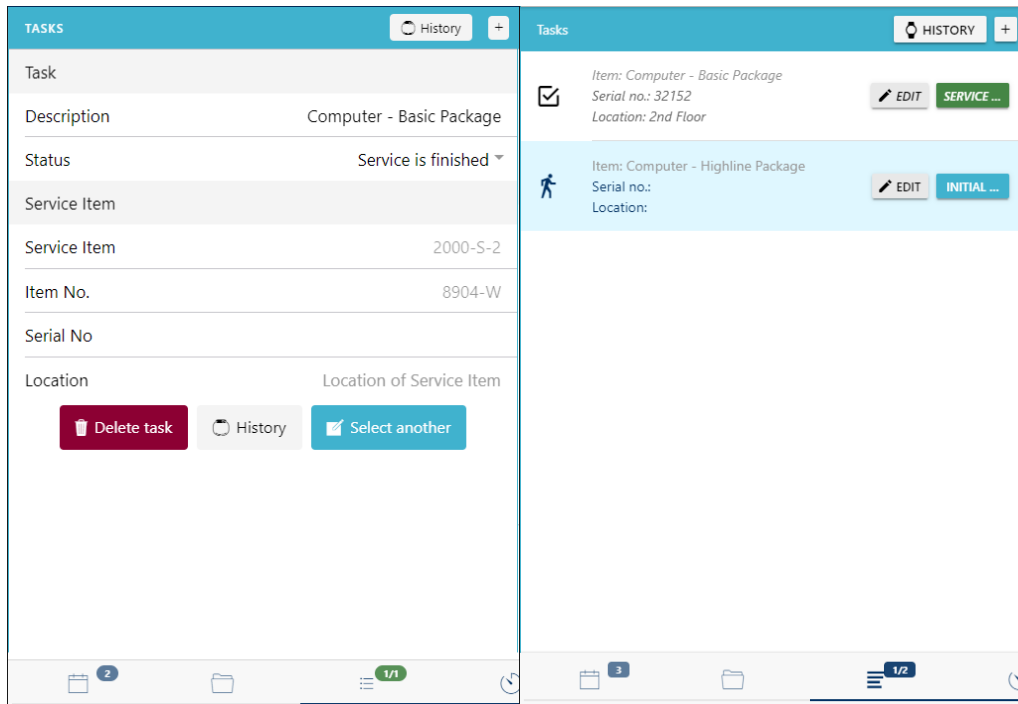
To the left the *Detailed view* can be seen while the simple view is to the right.

Detailed view

When looking at the *Detailed view* the *Service Item No.* and the *Item No.* can both be seen. Those two fields cannot be edited since the data come from Dynamics, but the *Description, Status, Serial No.* and *Location* can all be changed from the *Service client*. Below location three additional buttons are visible.
Delete task will remove the task.
The *History* button at the bottom will show the same as the History button at the top.
Select another will not add a task to the job but instead select a task to replace the current one.
On the navigation bar at the bottom of the screen the information bubble will change color from blue to green and show *1/1* if the *Repair Status* is set to *Service is finished*.

Simple view

The *Simple view* will show the *Location, Serial No.* and *Description*. It cannot be edited by clicking on the text in any of those fields. Clicking on a task will instead make it active so all the time and materials registered will be linked to that task. An active task will have a light blue background and the checkbox will show a walking man like it is shown on the picture. An inactive task will have no background color and an empty checkbox.
To edit the *Description, Serial No.* and *Location* click the *Edit* button instead. This will make a little window appear that looks like the detailed view and works the same way. The *Repair Status* is changed by clicking on the button next to the *Edit* button. A complete task will show a checkmark in the checkbox, have its *Repair Status* button turn green and on the navigation bar it will show *1/x*.

7.1.4 Time

Here the work types from *Configuration* can be seen. Choose one or more work types and enter the time and/or distance. The values entered can be viewed at the top in the *Time spent* field. Clicking on *Time spent* will expand the field and make it possible to delete anything entered. *Time spent (finalized)* shows all the already approved values entered on the same job or project. In the top right corner, the currently active task will be shown so the employee is aware of what task they are applying time to. In the top left corner, the employee can choose to add time to a different resource by clicking on their own name.

7.1.5 Materials

The *Materials* tab works almost the same way as *Time*. The materials are tied to the currently active task which can be viewed in the top right corner. The button in the top left corner gives the opportunity to change the inventory the material is taken from. *Materials used* shows the number of different materials used while *Materials used (finalized)* shows the already used materials on earlier service orders. To the right of the search field a button can be clicked. The button will open a pop-up where one or more product lists can be selected. The product lists are created in *Configuration*.

If for any reason the technician needs to register usage of materials, which are not part of the "standard" materials, the technician can create a smart item with all relevant details.

7.1.6 Reports

The reports created in *Report definitions* will be visible and interactable here. After filling out a report it will move to *Ongoing*. A report will be attached to the currently active task when filling out the report. As seen on the picture the task the report is attached to is visible under the report name. More than one report can be completed on a job and even a task. Mandatory reports will be marked with "*".

7.1.7 Attachments
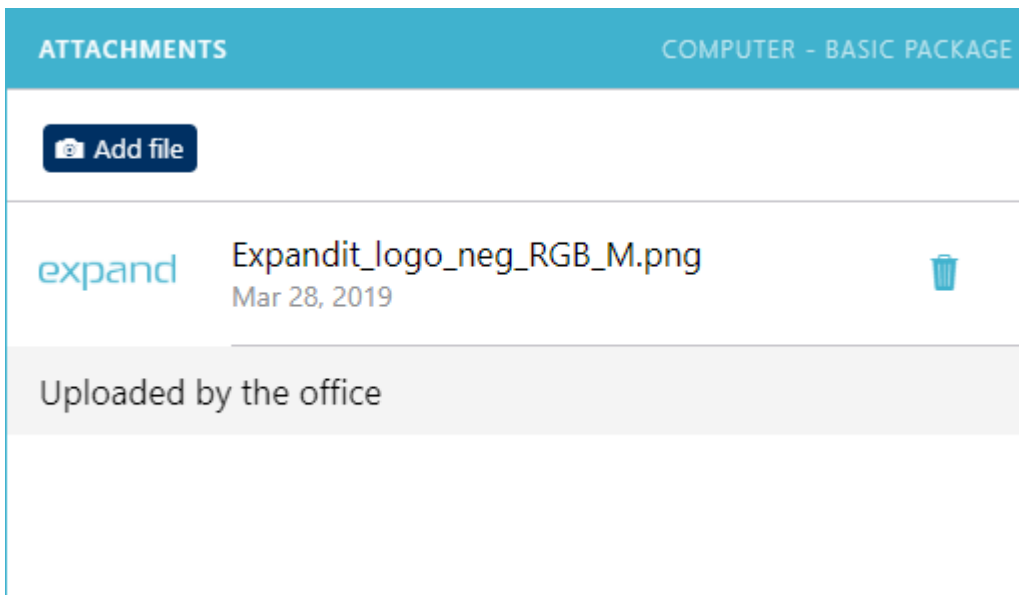
Attachments can be uploaded from the *Service client* for the office to see or can be uploaded by the office when creating the job. An attachment is just like a report tied to the job rather than a task.

7.1.8 Finish job
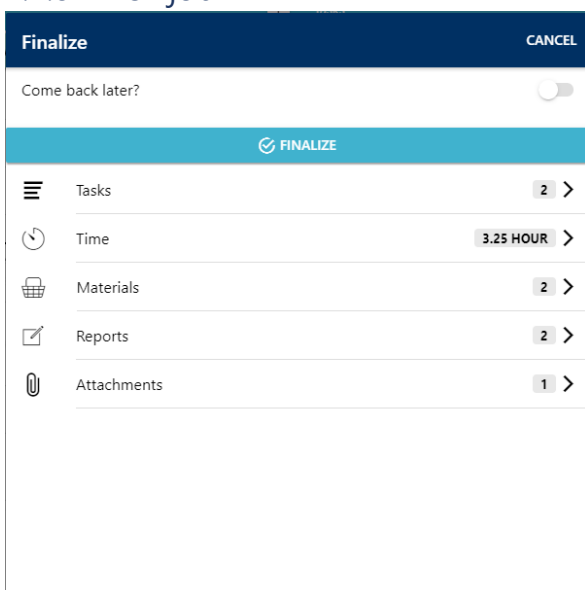
Clicking *Finish* on the *Job* tab will make this pop up. Everything registered on the job can be viewed here. Clicking *Finalize* will send the lines to approval and show the job as *Completed* on the *Planning Board*. Nothing will be able to be changed on the job from the client hereafter.

The service order can only be finalized once the mandatory reports have been filled out.

7.1.8.1 Come back later

If the job is not done at the end of a day or a more important job gets in the way the *Come back later* option should be used. This lets the job be planned for another time while still sending the lines to approval. On the *Planning Board* the status will show as incomplete and the new scheduled job can be seen on the Planning Board.

7.2 Clock in/out (Need text)

7.3 Week Sheet

Week sheet gives an overview of a week selected at the top of the screen. From here the total amount of hours worked that week can be seen alongside the number of hours that has been approved. The sheet shows hours by work type and by job. Each weekday can be clicked individually under *Details* to see what jobs have been worked on, what work types have been used, the working address, the time spent and if the time has been approved.

7.4 Create new job

An employee can create a job themselves by either choosing to create it based on a *Service Item* or a *Customer*.

7.4.1 Service Item/Serial No.

Service Item — CANCEL

Search...

17" M780 Monitor	MCM-060267
17" M780 Monitor	MCM-220791
17" M780 Monitor	MCM-290767
17" M780 Monitor	MCM-58746

Task — BACK CANCEL NEXT

Task

| Description | 17" M780 Monitor |
| Status | Initial Repair Status |

Service Item

Service Item	27
Item No.	80102
Serial No	MCM-060267
Location	Location of Service Item

Service Order — BACK CANCEL NEXT

Order information

Work desc. — Employee created job

Order type

Planning information

Start	Mar 29, 2019 12:27 pm
Duration	2 h 00 m
Assign to	Timothy Sneath

Summary — BACK CANCEL

Customer (10000)

Mr. Andy Teal
ham@expandit.com

The Cannon Group PLC 1
192 Market Square
B27 4KT Birmingham

Order information

| Work desc. | Employee created job |
| Order type | |

Planning information

Start	Mar 29, 2019 12:27 pm
Duration	2 h 00 m
Assign to	Timothy Sneath

Planning information

Start	Mar 29, 2019 12:27 pm
Duration	2 h 00 m
Assign to	Timothy Sneath

Task

| Description | 17" M780 Monitor |
| Service Item | 27 |

DONE

The process of creating a job on a Service Item is:
Choose service item→ *Create task*→ *Finish service order*→ Press *DONE* in the *Summary*

7.4.2 Customer

Creating a job based on a customer has a different process at the start. The step after selecting the *Service Item* is the creating the task and then the rest of the flow looks like *Service Item/Serial No*. above.

7.5 Order search

Clicking on a project will open it in the *Overview*. Here time and materials can be added to the project and can act as a shortcut instead of needing the project to be planned on the *Planning Board*.
Clicking on a *Service Order* will also open it in the overview where messages, finalized time and materials can be viewed but nothing new can be added.

7.6 History

In *History* old orders, tasks, comments, reports and material registrations can be viewed.

7.7 Messages

Messages from the office can be viewed by either going to the main menu and choosing *Messages* or by clicking on the letter in the top right corner. The letter will only appear if there is a new message, so to view old messages the employee must go through the main menu.
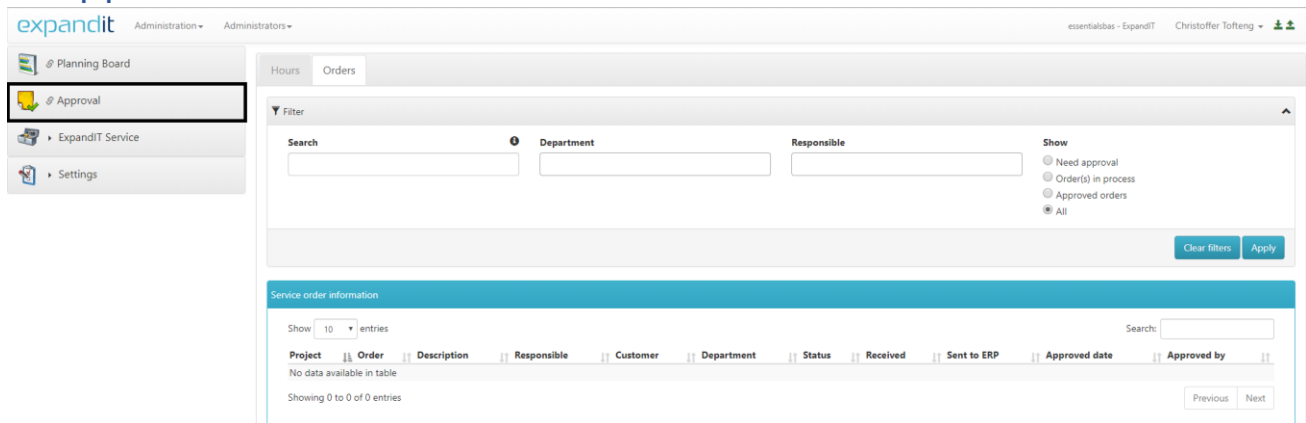
7.8 Settings

Clicking this will redirect the employee to the start page.

7.9 Language
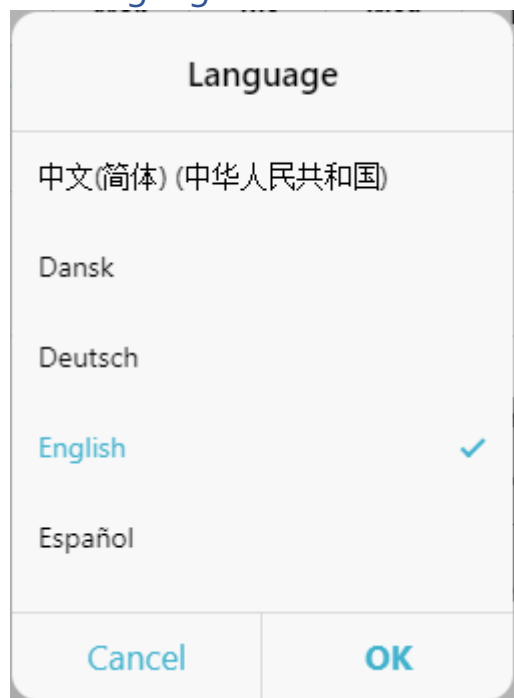
The *Language* can be changed from the main menu and not only from the start page.

8. Approval

The *Approval* module is used to approve time and finished orders so invoices can be sent to the customer. It can be found either as marked by the black box on the picture or through *ExpandIT Service* → *Approval*

8.1 Orders
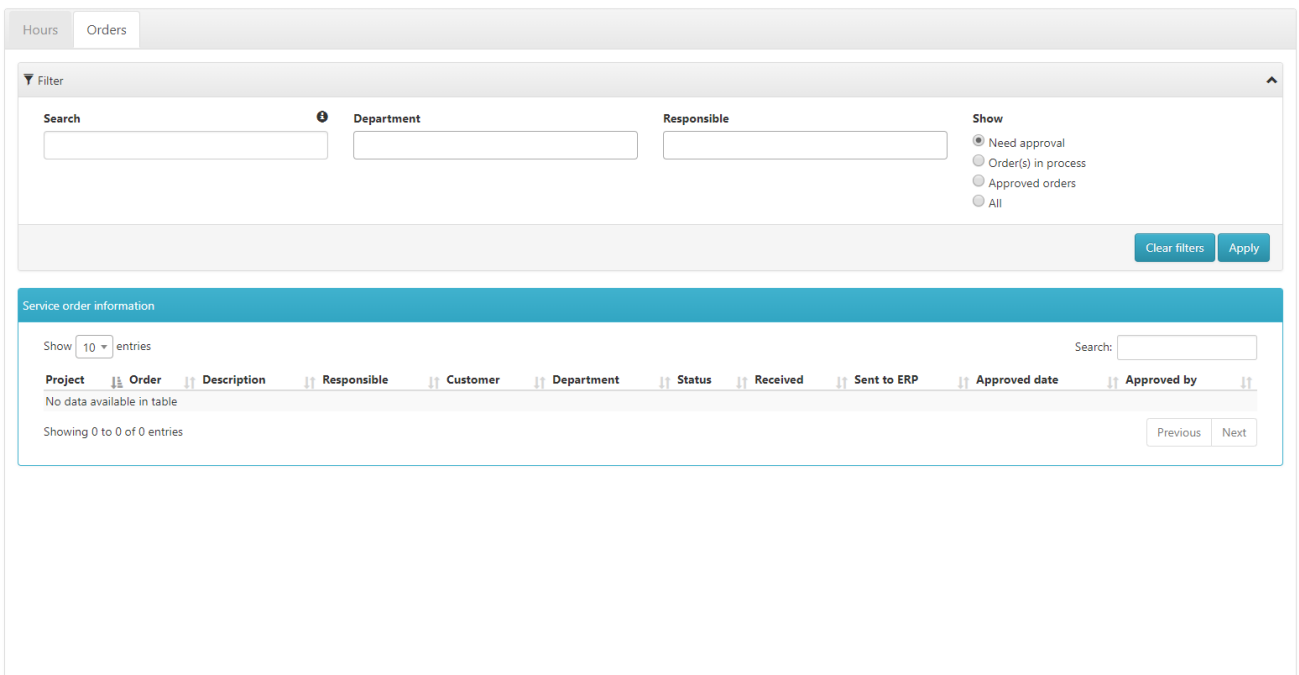
From the *Orders* tab it is possible to select filters before searching for the order that needs approval. When the search is done the results will appear in the blue box below. If a search returns with a lot of orders the box has its own sorting options and search function.

8.1.1 Order overview
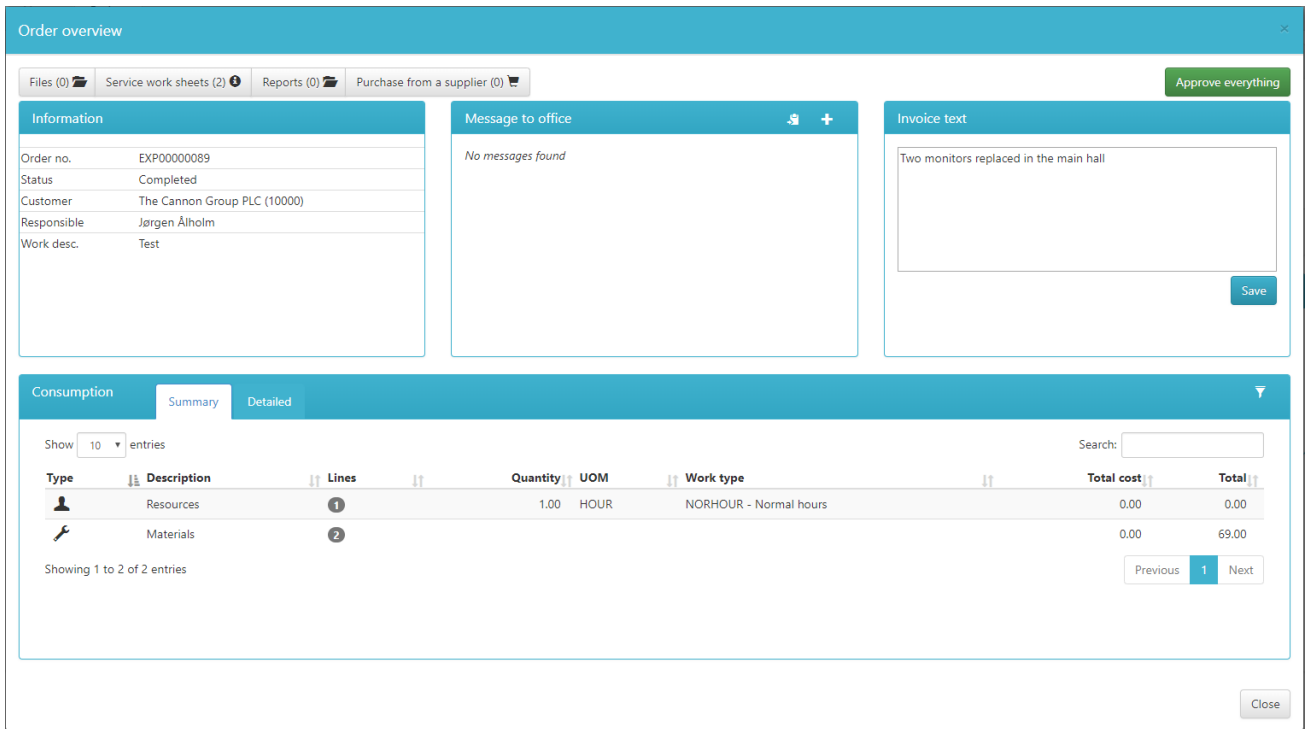
After clicking on an order, the *Order overview* appears. Here everything registered on the job can be viewed. At the top it can be seen how many files, service work sheets and reports there are on the order. Clicking on each of the tabs will show when and who the files, sheets and reports are from. Clicking on *Reports* and selecting one will open the report in a new window.

8.1.1.1 Information, message to office and invoice text

The top half of the *Order overview* consists of three smaller boxes. The *Information* box which shows what order it is, the *Message to office* box which show all messages sent internally throughout the duration of the job, and the *Invoice text* box which is editable.

The *Order overview* is the last chance to edit the *Invoice text*.

8.1.1.2 Consumption

Summary

The *Summary* of the consumption only shows how many lines there are of each type. If more than one work type was used on the job it will show them as separate types.

The button on the blue bar to the right is the filter button. By clicking on it the option to see already approved lines appear as well as the option to sort by only resources or materials.
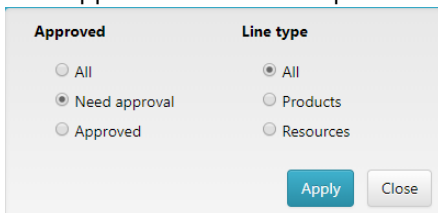
By comparing the following picture with the first *Order overview* picture it can be seen more lines are added.

The red *1* means a line has been deleted.

Detailed

The approving in the *Detailed* tab works the same way as with [Hours](#) so each line can be edited, deleted or approved. The key difference between the *Hours* tab and the *Order overview* is that materials are present here. Right now, there is only one time-line from TS. That is because the other line was approved in the *Hours* tab and the filter is right now set to only show unapproved lines. To the right of the filter button a + has appeared. Clicking on this button gives the option to add another line to the order that being both resource and material.

With the filter turned on to showing all lines the approved lines appear as well as the one deleted line. The picture also shows the approved time-lines from when the job has been worked on earlier. Mark has worked on the job 12/11/2018 while the deleted line was registered on 03/21/2019. The approved time-line from TS cannot be seen on this picture since it is on page two so be cautious when approving a job with a lot of lines since they can be on another page. At the top each page can be set to show more lines.

A justification is required when adjustments are made to the data prior to the approval.

Check the boxes that need approval and press save to send them to Dynamics.

Approve everything

When the job is done, and every line is registered on the job, the green *Approve everything* button can be pressed. This will make an alert appear and when clicked the job will be sent to the Dynamics next time *Inject* is used and can no longer be edited. Remember to write an *Invoice text* if the field is empty.

8.2 Hours

Hours registered on a job can be approved before the job is completely done like described in *Come back later*. This feature can be useful in case the job being worked on spans over multiple days including payday and the employee(s) working on the job still wants their salary.

To find any time to approve a search needs to be done first. Choose whether to set a filter or just search for anything unapproved by clicking *Apply*. The date is automatically set to today unless changed. Just like on the *Planning Board* a filter can be saved for later use and shared to other users by clicking on *Edit* at the top to the right.

The blue bar must be expanded manually for it to look like the picture above. Here all the time registrations can be seen and edited. When editing a time registration, a *Justification* is required like it can be seen on the picture below. The *Justification* can be seen by the employee on the *Service client* afterwards.

The first of the 4 symbols on the image above gives information about the job it is attached to. Clicking it will open the *Order overview*.
The picture with the two papers will make an exact copy of the line.
The trash can will delete the line. Clicking on it will ask for a justification before the action is performed. When a line is deleted a message will be sent to the user through the *Service client*.
The last symbol will only show if the job is linked to other jobs. It cannot be clicked but hovering the mouse over the picture a box will appear telling which employee(s) the job is linked with.

Check each box individually if not all lines of a user should be approved at the same time. If all lines should be approved an easier way is to check the box in the blue bar, this will check all the boxes under the user. Press *Save* at the bottom of the screen to approve the lines.

9. Settings
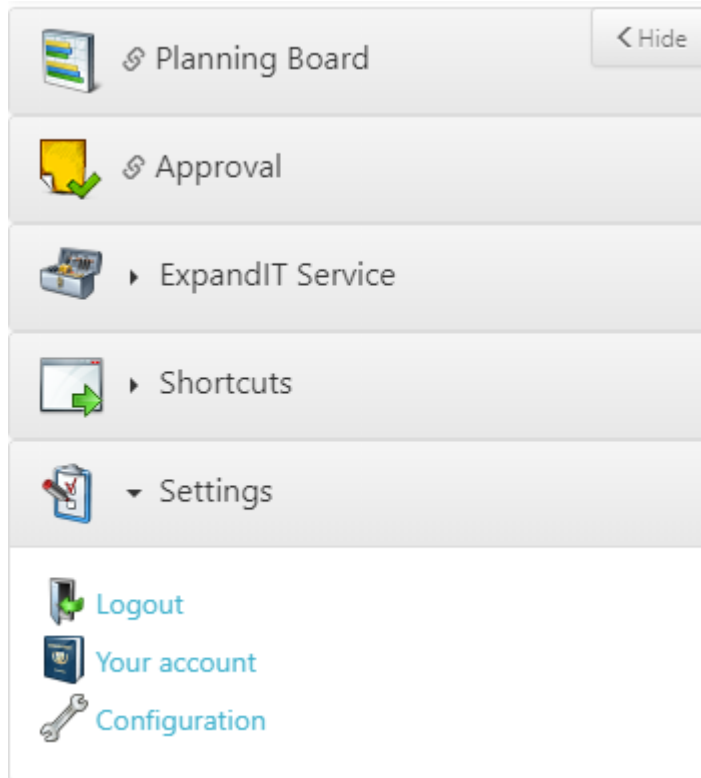
9.1 Logout

Clicking on *Logout* will log out the user.

9.2 Your account

- The Password has to be typed in to update any data

- You can change your current [User name]
- You can change your current [Login]
- Change your current Password by filling [New password] and [Confirm New Password]

The language can also be changed from here. The amount of languages to choose from is set in *Languages*.

9.3 Configuration

Application Configuration

🔧 Mobile Service	▼
🔖 Attachments	▶
💬 Comments	▶
⚙ General	▶
📍 Geolocation	▶
📦 Materials	▶
📅 Planning	▶
🔗 Projects	▶
📄 Reports	▶
☰ Tasks	▶
⏱ Time	▶
👤 Service Manager	▶

💾 Save

Application Configuration

🔧 Mobile Service	▶
👤 Service Manager	▼
✔ Approval	▶

💾 Save

From *Configuration* the settings of different parts of the solution can be set.

9.3.1 Attachments

9.3.1.1 Show attachments

Show attachments throughout the solution.

9.3.2 Comments

This panel determines what messages can be sent and seen on the job for the user. In *Comments*, the three boxes *Internal Messages, Message to Invoice* and *Portal messages* which here are set to *Show,* can be seen in *Comments* as white and text can be entered into them while the last box *Additional messages* is greyed out.

9.3.2.1 Additional messages

Additional comments are comments from the ERP system, that are not mapped to the other comment types.

9.3.2.2 Internal Messages

Internal comments are shared between the mobile users and dispatchers.

9.3.2.3 Message to Invoice

Invoice comments are intended to be saved through to the ERP system and presented on the final invoice. This functionality may require additional development in the ERP system.

9.3.2.4 Portal messages

Portal comments are shared with customers on the ExpandIT Service Portal.

9.3.3 General

General		▼
Enable service items *If enabled, use service items throughout the solution*		**Yes** No
Enable create new work order *If enabled, new work orders can be created*		**Yes** No
Message check interval *Specify the duration in seconds to check for new internal messages, or use 0 to disable*	60	
Clock in/out *Allows the mobile user to specify if they are working or not*		**Show** Hide
Clock in mandatory *Require the user to clock in before being able to record data*		Yes **No**
Background synchronization *If enabled, the offline database will be updated automatically and in the background*		Yes **No**
Background synchronization interval *The interval (in minutes) to perform the background synchronization*	15	
Use barcode scanners that emulate keyboard *Enable this setting, if you wish to use barcode scanners that transfer barcodes to applications as normal keystrokes.* *External scanners typically do this.*		**Yes** No

The *General* box contains options related to the *Service client*. From here the *Clock in/out* is enabled or disabled and can even be made mandatory, allow the user to not specify a work type or make it mandatory to choose a project when creating a new service order.

9.3.3.1 Enable service items
Specify whether service items should be usable throughout the solution

9.3.3.2 Enable create new work order
Enable for ability to create new work orders from the client

9.3.3.3 Message check interval
Specify the duration in seconds to check for new internal messages or use 0 to disable.

9.3.3.4 Clock in/out
Allows the mobile user to specify if they are working or not.

9.3.3.5 Clock in mandatory
Require the user to clock in before being able to record data.

9.3.3.6 Background synchronization
Specifies the ability to update the offline database in the background.

9.3.3.7 Background synchronization interval
Set the background synchronization interval in minutes

9.3.3.8 Use barcode scanners that emulate keyboard
Enable for ability to use a barcode scanner to enter barcodes as normal keystrokes.

9.3.4 Geolocation

The *Geolocation* box is where options about the location tracking on the mobile client.

9.3.4.1 Enable Geolocation Tracking

Enables geolocation tracking in the mobile device (from the browser)

9.3.4.2 Only track location when clocked in

Control if location tracking is performed always or only when clocked in

9.3.4.3 Geolocation Tracking interval when moving (s)

Sets the interval in seconds that the mobile device will send the gps position to the server when the user is in "moving" status

9.3.4.4 Geolocation Tracking interval when not moving (s)

Sets the interval in seconds that the mobile device will send the gps position to the server when the user is in "not moving" status

9.3.5 Materials

This panel is about materials and whether some options about materials should be mandatory e.g. a user cannot finish a job before adding materials.

9.3.5.1 Show materials

Show materials throughout the solution.

9.3.5.2 Task mandatory

Require an active task to record materials.

9.3.5.3 Inventory location mandatory

Require an inventory selection to record materials.

9.3.5.4 Smart Item

If enabled, the user will be able to add a smart item under materials.

9.3.5.5 Smart item product

Define which product should be used as a smart item.

9.3.6 Planning

📅 Planning	▼
Show Job Pool *Show the Job Pool in the Planning column*	Yes No
Allow rescheduling of jobs *If enabled, the user can reschedule jobs*	Yes No

9.3.6.1 Show Job Pool

Show or hide the job pool in the planning column

9.3.6.2 Allow rescheduling of jobs

Define whether technicians can reschedule jobs.

9.3.7 Projects

⛖ Projects	▼
Allow search for all projects *Find all projects (yes) or internal projects only (no)*	Yes No
Require project selection *When creating new orders, is a project required during the creation process*	Yes No

9.3.7.1 Allow search for all projects

Define access for all projects

9.3.7.2 Require project selection

Define whether a project is required for new orders.

9.3.8 Reports

🗋 Reports	▼
Show reports *Show reports throughout the solution*	Show Hide
Add customer's e-mail to reports *If enabled, automatically copy the customer's email address to the recipient list of the report*	Yes No

9.3.8.1 Show reports

Show reports throughout the solution.

9.3.8.2 Show reports

Define whether the e-mail address should be populated automatically for the recipients list of the report.

9.3.9 Tasks

Tasks		
Show tasks *Show tasks throughout the solution*	`Show`	`Hide`
Additional messages for tasks *Additional comments are comments from the ERP system, that are not mapped to the other comment types*	`Show`	`Hide`
Internal messages for tasks *Internal comments are shared between the mobile users and the office*	`Show`	`Hide`
Message to invoice for tasks *Invoice comments are intended to be saved through to the ERP system and presented on the final invoice. This functionality may require additional development in the ERP system*	`Show`	`Hide`
Portal messages for tasks *Portal comments are shared with customers on the ExpandIT Service Portal*	`Show`	`Hide`
Enable create new task *If enabled, new tasks can be created*	`Yes`	`No`
Link activities to tasks *If enabled, an activity can be linked to a task during creation. The information about the activity will be displayed on the task*	`Yes`	`No`
Link service items to tasks *If enabled, a service item can be linked to a task during editing and creation. The information about the service item will be displayed on the task*	`Yes`	`No`
Link products to tasks *If enabled, a product can be linked to a task during editing and creation. The information about the product will be displayed on the task*	`Yes`	`No`
Allow manual text entry on tasks *If enabled, tasks can be created with no other information than a text field*	`Yes`	`No`

9.3.9.1 Show tasks

Show tasks throughout the solution.

9.3.9.2 Additional messages for tasks

Show additional comments from the ERP system, which aren't mapped to other comment types.

9.3.9.3 Internal messages for tasks

Enable messages between the mobile user and the office

9.3.9.4 Message to invoice for tasks

Invoice comments to be saved to the ERP.
(Additional development in the ERP-system is required.)

9.3.9.5 Portal message for tasks

Portal messages are shared with customers and the ExpandIT Service Portal

9.3.9.6 Enable create new task

New tasks can be created if enabled

9.3.9.7 Link activities to tasks

If enabled, an activity can be linked to a task during creation. The information about the activity will be displayed on the task.

9.3.9.8 Link service items to tasks

If enabled, a service item can be linked to a task during editing and creation. The information about the service item will be displayed on the task.

9.3.9.9 Link products to tasks

If enabled, a product can be linked to a task during editing and creation. The information about the product will be displayed on the task.

9.3.9.10 Allow manual text entry on tasks

If enabled, tasks can be created with no other information than a text field.

9.3.10 Time

9.3.10.1 Show time

Show time throughout the solution.

9.3.10.2 Task mandatory

Require an active task to record time.

9.3.10.3 Time resolution

The time resolution in minutes to use when recording time. A value of 15 allows minutes 0,15,30 and 45.

9.3.10.4 Allow blank work type

When enabled. The users can enter time without specifying a work type.

9.3.10.5 Enable time for machines

If enabled, the user can enter time for machines

9.3.10.6 Enable record time for other persons

If enabled, the user can enter time for other persons

9.3.11 Approval

The options in the *Approval* box will determine how much of the service order will have to be approved manually.

9.3.9.1 Approve service orders automatically

If turned off, service orders will have to be approved manually before they can be invoiced.

9.3.9.2 Approve service order products automatically

If turned off, service order products will have to be approved manually before they can be invoiced.

9.3.9.3 Approve service order resources automatically

If turned off, service order resources will have to be approved manually before they can be invoiced.

9.3.9.4 Approve service order costs automatically

If turned off, service order costs will have to be approved manually before they can be invoiced.

9.3.9.5 Approve service order comment lines automatically

If turned off, service order comment lines will have to be approved manually before they may be sent to the ERP system.

9.3.9.6 Approve service order attachments automatically

If turned off, service order attachments will have to be approved manually before they may be sent to the ERP system.

9.3.9.7 Approve service order reports automatically

If turned off, service order reports will have to be approved manually before they may be sent to the ERP system.

9.3.9.8 Approve service order signatures automatically

If turned off, service order signatures will have to be approved manually before they may be sent to the ERP system