PMS PORTAL – PARTNER SERVICE MANAGER CONSOLE USER GUIDE

Standard Edition – V0.1

Confidential

Table of Contents

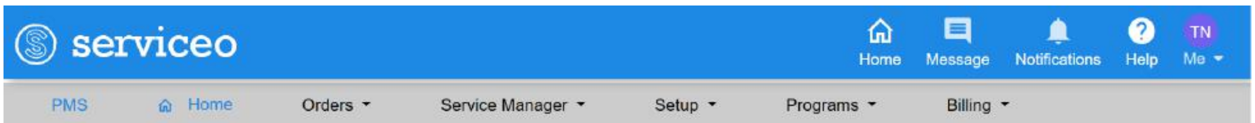
1 Partner Management System (PMS)

ServiceO portal designed to manage customer-specific requirements. It combines best in class solutions providing partners the ability to submit, track, and manage service cases online.

The System is capable of meeting customer-specific requirements for reliability, responsiveness, agility and cost. It also features industry-specific functionality allowing you to identify and keep track of customer assets throughout your network of global facilities.

Service Manager Features:

The Serviceo portal provides our partners with the ability to submit, track, and manage service cases online.



Serviceo (PMS) supports following key features:

	Menu	Sub Menu	Features Supported
1	**Orders**	Create Case (Dispatch FSE – Customer Site)	Web Form, Submit a new service incident request.
2	**Service Manager**	Service Manager Console	All Cases List View, List of all open service cases. Service Manger Dashboard
		Activity Feed Console	Case Activity view from a centralized console, monitor updates across all open service cases.
		Service Manager Console: Case Details View	Case Order Details
			Case Messaging
			Case Order Status (Job Manager → Summary)
			Case Activity Feed (Job Manager)
3	**Setup**	Manage Jobsite (PMS)	List of all “Active” Program Jobsite Locations.
			Add a new Jobsite Location to Program.

		User Management (PMS)	Create any number of additional login user accounts in the PMS Portal.
4	**Programs**	Program Profile	Lists details of Programs, Project Vendors, and Project Workers.
		Service Catalogue (Price List) (PMS)	Program → Service Catalog (Price List) (PMS).
			Service Global Standard price list
		Iron Global Service Locator (PMS)	Program → IRON Global Service Locator (PMS)
5	**Billing**	PMS Billing (Invoice) Dashboard	Invoice Details
			Program → PMS Billing (Invoice) Dashboard.

1.1 Intended Audience

This document is primarily indented for the Partner Users only. The information contained in this manual is intended to be used only by the authorized members with proper rights and privileges.

2 Getting Started

In this section, you will find instructions and other information useful for evaluating the Serviceo and getting to know it when you are starting out.

Program Setup: Portal User Login Credentials

Please contact your Account Administrator (Site Manager) for Login information:

Portal Login Information		
	PMS Partner Portal URL:	https://. Google Chrome (recommended)
	Login Information	
	Login (Email):	*Your email address*
	Account Name:	*Your company's account name*
	Account ID:	*Your company's account ID*
	Password:	*Your password*
	Web2Case Login Information (Please use this option in case if you are unable to access Portal)	
	Web2Case Portal URL:	http://
	Login Information	
	IRON Service Global Account Name:	*Your company's account name*
	IRON Service Global Account ID:	*Your company's account ID*
	Program Reference Code:	*Program Code*

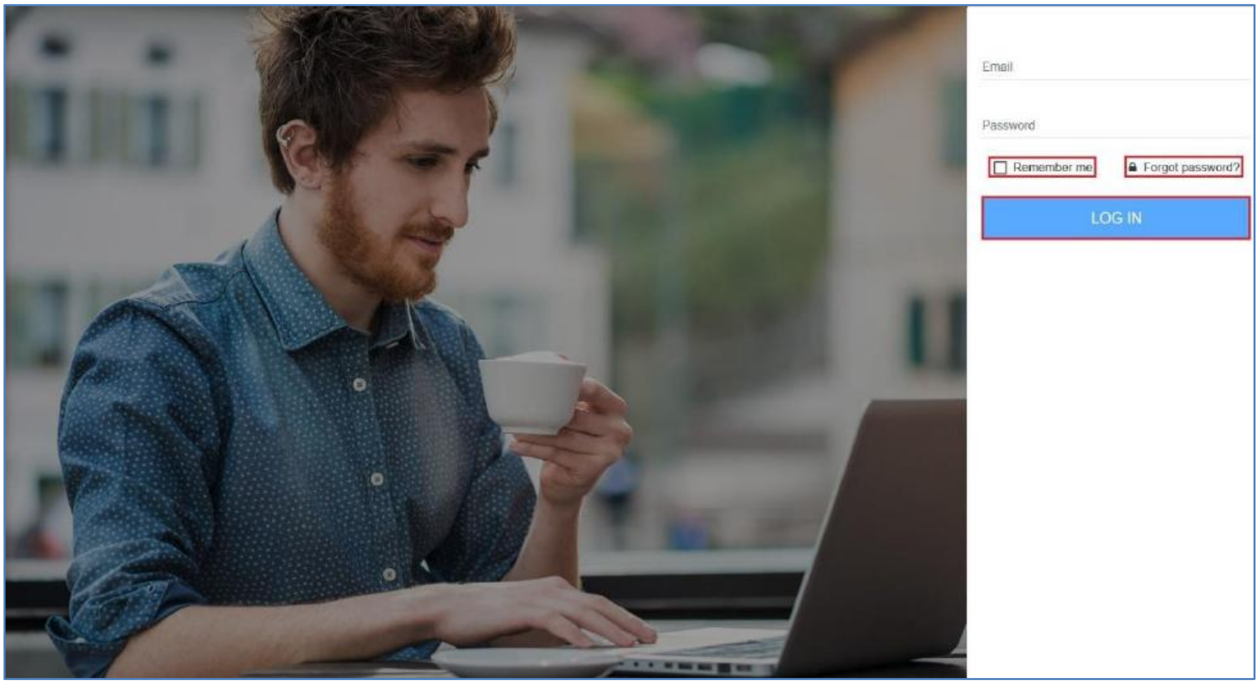
To access the **PMS** menus, the user you log on as must have rights to run the module. If you want access to the **PMS** and the System will not allow you to log on, contact your System Administrator to verify that your user name has been granted appropriate rights.

To use Serviceo portal, you need to open **PMS Partner Portal URL** (Https://.), select **Partner (PMS) User** option, and then enter your Email and password at the login screen. This process only takes a few seconds and ensures the privacy and security of your product information.

1. Log into to the Serviceo portal.

   The *Login* page is displayed as shown in Figure 2.1.

Figure 2.1: Login page

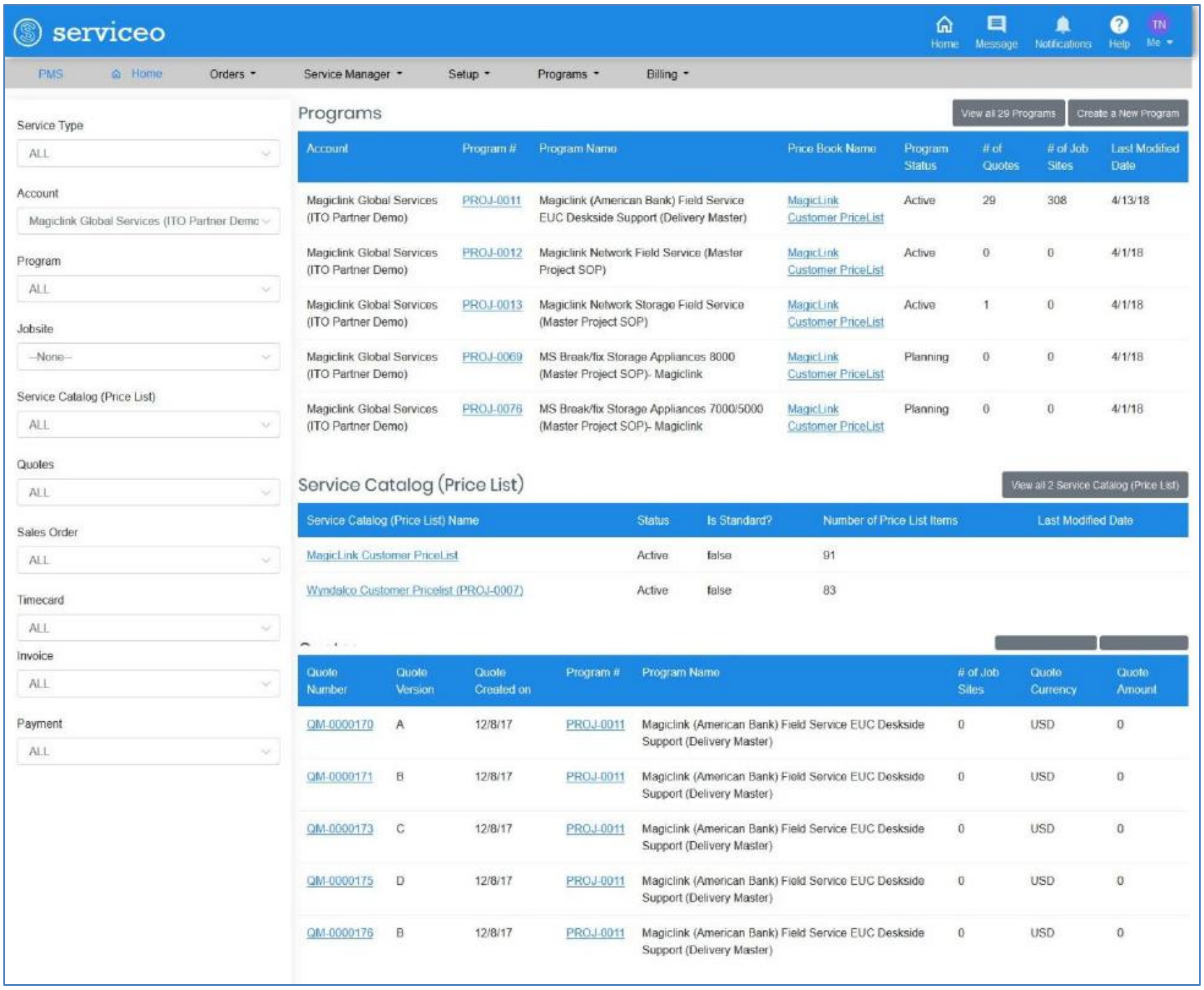


Tip: Select the **Remember me** check box to store your credentials in the cookies and enables you to sign back automatically if you close the site without logout. Click the **Forgot password?** to reset your password. You will be taken to the *Reset* screen where you need to enter your Email and then click **Reset** button. The instructions to reset password will be sent to the entered Email.

2. Type your correct Email in the **Email** field.
3. Type your password in the **Password** field and then click the **LOG IN** button to access home page.

The *PMS home* page is displayed as shown in Figure 2.2.

Figure 2.2: PMS home page



3 Manage User

In the Serviceo, user type 'Case Dispatch Lead' is a designated Administrator with privileges to manage users by default. An Admin has special access/rights to create any number of user accounts in the Serviceo. The Manage User module makes it easier for administrator to configure users.

Specifically, an administrator can:

- Add new user
- Edit existing users
- Activate/Deactivate existing users
- Reset password

Here, each person using the Serviceo is known as a user. When a new user is added, Email Id of that user must be unique (It can't be the same as any other user name in the system even associated with different Account)

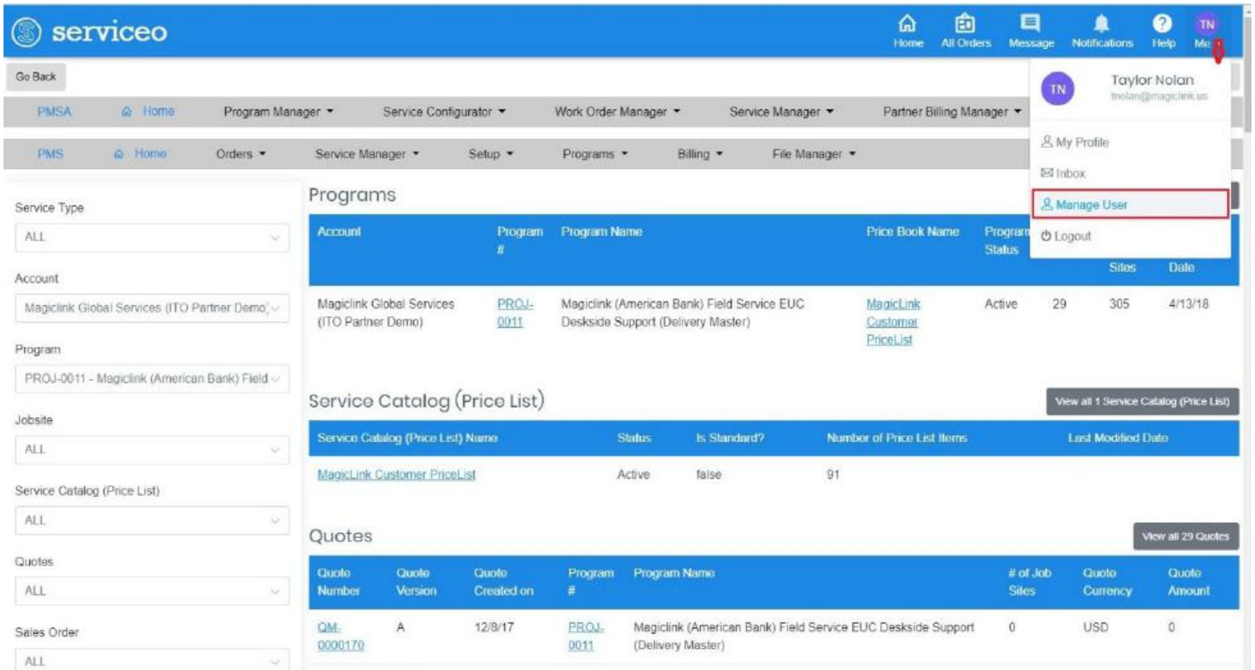
If the User Name (Email Id) already exists in the system associated with any Account, the system displays a message telling that the Email Id already exists.

Manage User module is designed to add a new user, edit user details, activate/deactivate existing users, and reset users' passwords on the request of users.

A user with the necessary rights can access the Manage User Module. In the Serviceo, only Case Dispatch Lead user type has rights to configure users.

To access Manage User module, perform the following steps:

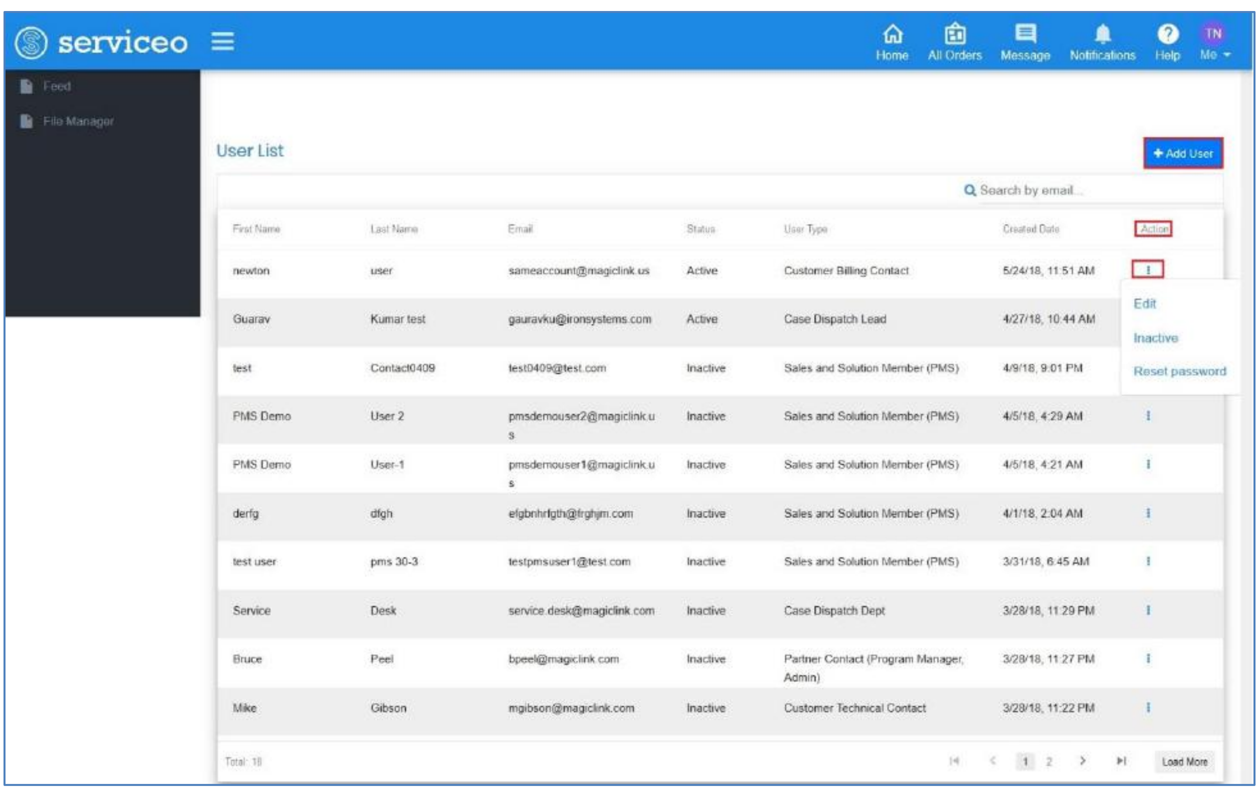
The *PMS home page* is displayed as shown below:



1. Click the **Logged User** icon in the top right corner of the *home page* and then click **Manage User** icon to access *Admin* page.

   The *Admin* page appears as shown in Figure 3.1.

Figure 3.1: Admin page

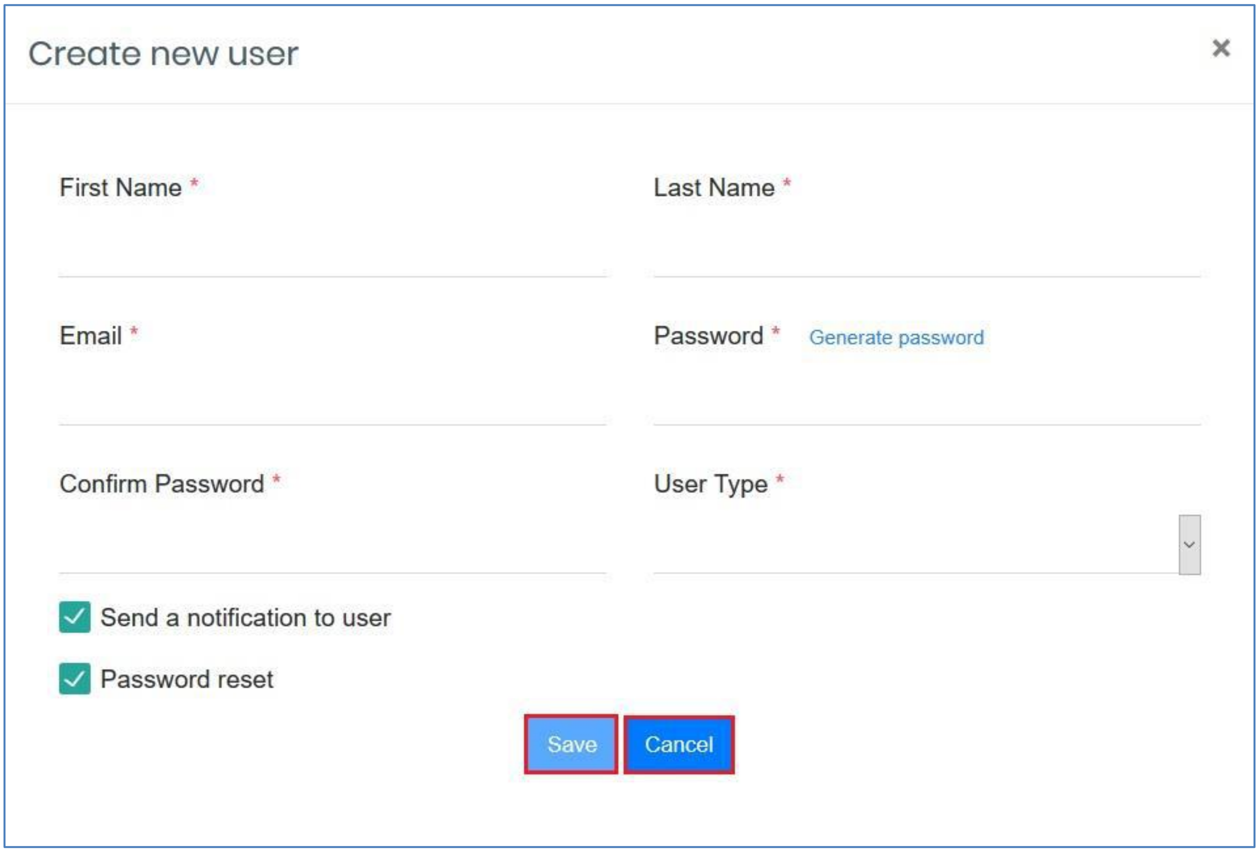


3.1 Adding User(s)

Here, you can add users by selecting an appropriate user type. All added users of all types will be in active state by default.

1. Click the **Add User** button on the *Admin* page to add new user into the system. Refer Figure 3.1.

   A *Create new user* pop-up displays as shown below:



   Note: Fields marked with an asterisk are mandatory.

2. Type the first name of user in the **First Name** field.
3. Type the last name of the user in the **Last Name** field.
4. Type the correct email address of the user in the **Email** field.

   Note: The entered Email Id must be unique as it only be used to create login credential in the system.

5. Type the password for the user in the **Password** and **Confirm Password** fields, respectively or click the **Generate password** link to generate machine generated password in the fields.
6. Select the relevant user type in the **User Type** drop-down list.

   Tip: You can select the **Send a notification to user** check box, if you want to send user creation notification to the respective user in the form of email.

If you want to send the password reset link to the user, select the **Password reset** check box. In this case, the user receives a password reset link and can reset default password of his/her choice.

7. Click the **Save** button to create user.

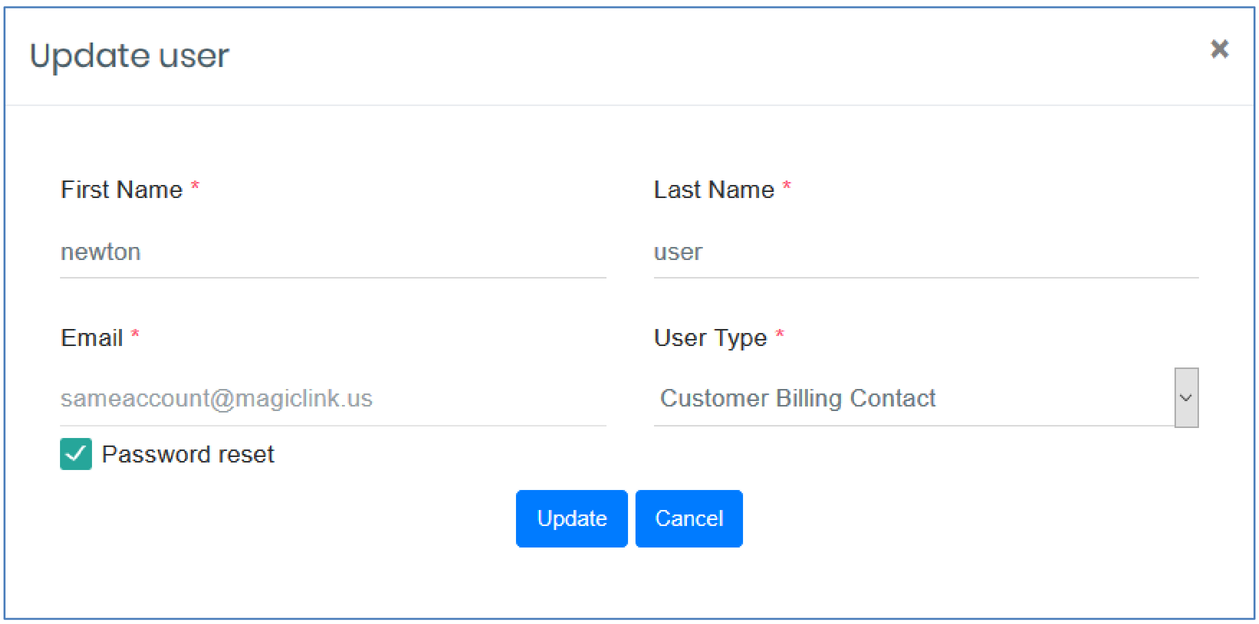
   Note: The created users will appear in the **User List** on the *Admin* page. To view the added user in the User List, you need to refresh the *Admin* page.

3.2 Editing User Details

To edit user's details, perform the following steps:

1. Click the icon in the **Action** column and then select the **Edit** option to edit the user's details. Refer Figure 3.1.

   An *Update user* pop-up appears as shown below:



   Note: Here, you can modify values in all fields, except Email Id of the user.

   Tip: Select the **Password reset** check box to send password reset link to the user.

2. Make the changes in the fields you want to modify and then click the **Update** button to save the changes.

   A message "*User update successfully!*" displays at the top of the *Admin* page and the updated user will appear in the User List.

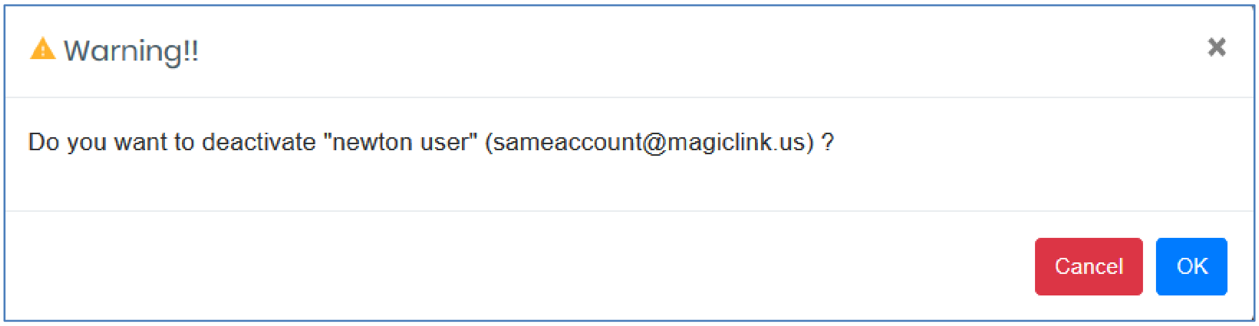
   Tip: Click the **Cancel** button to close the *Update user* pop-up and cancel user's details modification.

3.3 Inactivate User

To inactivate user, perform the following steps:

1. Click the icon in the **Action** column and then select the **Inactivate** option. Refer Figure 3.1.

   A *Warning* pop-up is displayed asking if you want to deactivate user as shown below:



2. Click the **OK** button to confirm the deactivation of the user.

   A message “*User newton user deactivate successfully!*” displays at the top of the *Admin* page.

   Note: As you click the **OK** button, the user will be deactivated but still appears in the User List as ‘Inactive’ state and can be Activated in future, if required. Once a user is deactivated, it can’t be edited.

   Tip: Click the **Cancel** button to cancel changes.

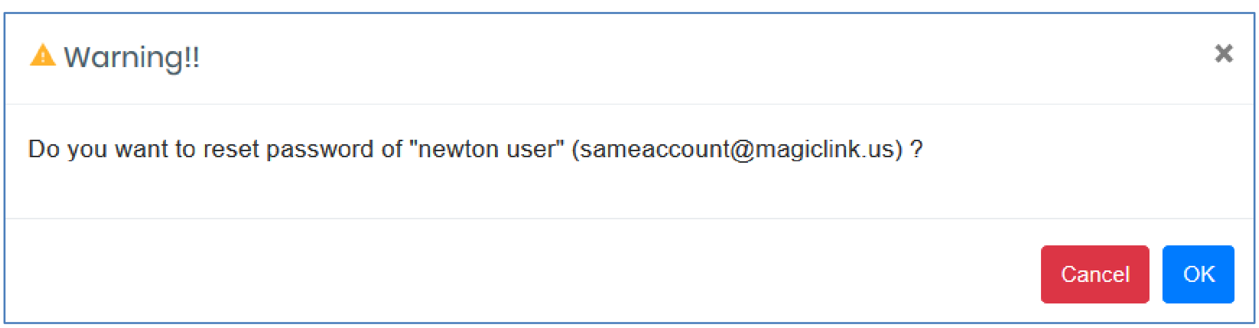
3.4 Reset Password

This option allows you to reset users’ password on their request.

To reset password, perform the following steps:

1. Click the icon in the **Action** column and then select the **Reset password** option.

   A *Warning* pop-up is displayed asking if you want to reset password as shown below:



2. Click the **OK** button to confirm the reset password.

   A message “*Reset password E-mail has been sent to sameaccount@magiclink.us*” at the top of the *Admin* page.

Note: Once you click the **OK** button, a password rest link is sent to respective user enabling them to change their password.

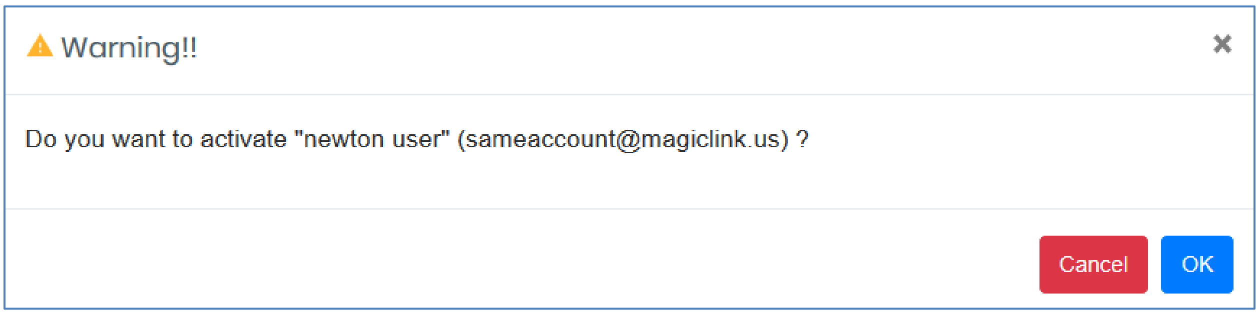
Tip: Click the **Cancel** button to cancel changes.

3.5 Activate User

To activate inactive users, perform the following steps:

1. Click the icon in the **Action** column of the Inactive user and the select **Active** option.

   A Warning pop-up is displayed asking if you want to activate this user as shown below:



2. Click **OK** button to activate the user.

   Note: As you click the **OK** button, the status of this user changes as ‘Active’ and appears in the User List on the *Admin* page.

   Tip: Click the **Cancel** button to cancel the changes.

4 Order Management

This module provides key functionalities overview related to service catalog, jobsite location, and new case creation web form section and fields.

The created orders can be used to efficiently track or manage different types of services.

Here, you can also view progress bar showing the different stages of order completed during the process. The progress bar will run a colored bar showing the complete or incomplete stage. It also provides lots of flexibility for order handling while providing visibility for users to better understand the status.

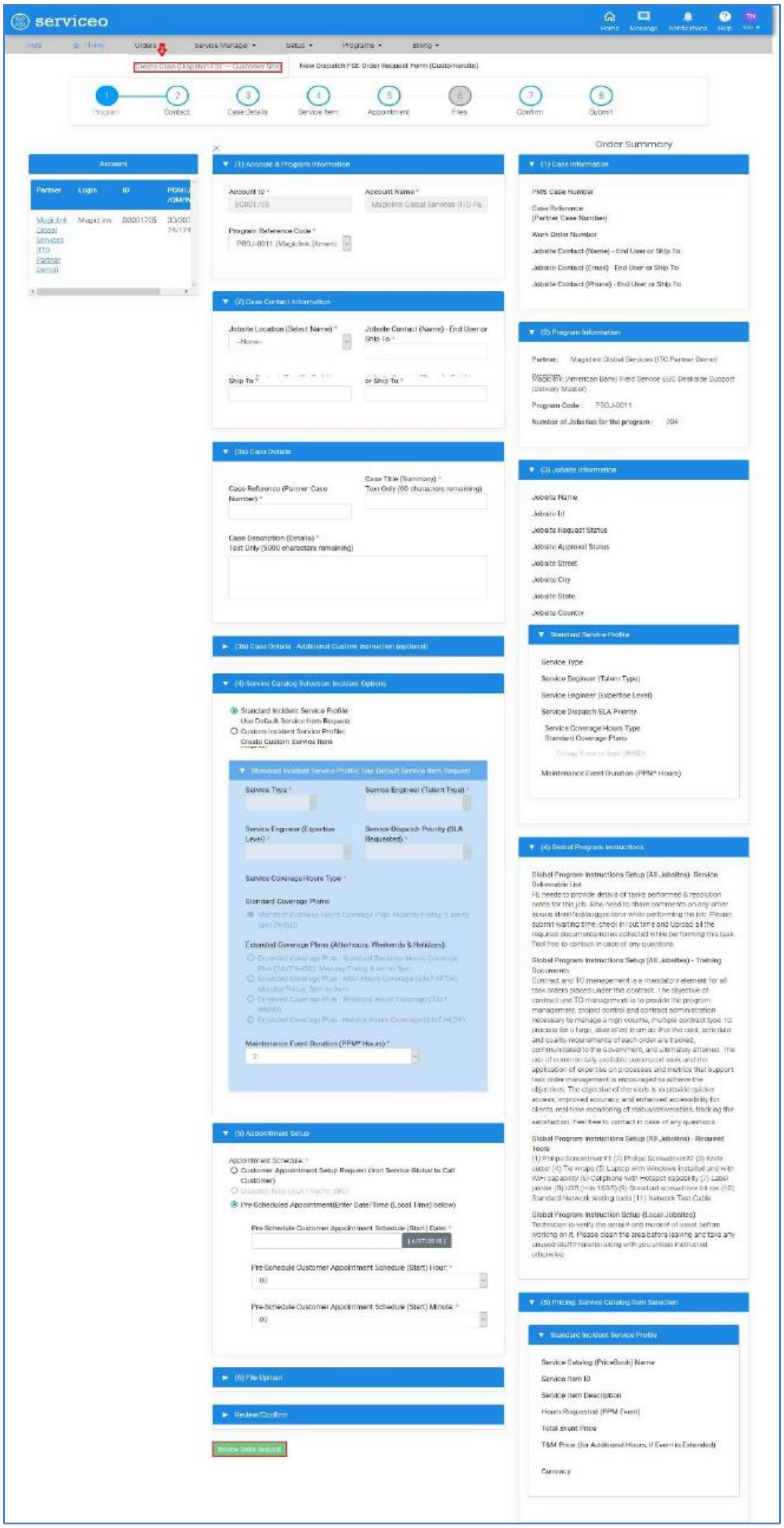
This module provides key functionalities overview related to new case creation web form section and fields.

To access Create Case (Dispatch FSE – Customer site) screen, perform the following steps:

1. Click the **Orders** located next to the **PMS** *Home* icon and then click the **Create Case (Customer site)** option. (Orders → Create Case (Customer site)

   The *New Dispatch FSE Order Request Form (Customersite)* screen displays as shown in Figure 4.1.

Figure 4.1: New Dispatch FSE Order Request Form (Customersite) screen



Note: The *New Dispatch FSE Order Request Form (Customersite)* screen shows progress bar on the top, the ***Account*** section at the left and the ***Order Summary*** section at the right side of the screen.

The ***Account*** section displays a list of partners including their Login, ID and other details.

The ***Order Summary*** section is composed of six tabs:

- The ***Case Information*** tab holds case related information.
- The ***Program Information*** tab displays program details.
- The ***Jobsite Information*** tab holds jobsite related details.
- The ***Standard Service Profile*** tab holds standard service profile details selected for case.
- The ***Global Program Instructions*** tab holds instructions for Service Deliverables.
- The ***Pricing: Service Catalog Item Selection*** tab holds price details.
- The ***IRON (Internal): Program Vendor Routing Summary*** tab holds the details of vendor routing summary.

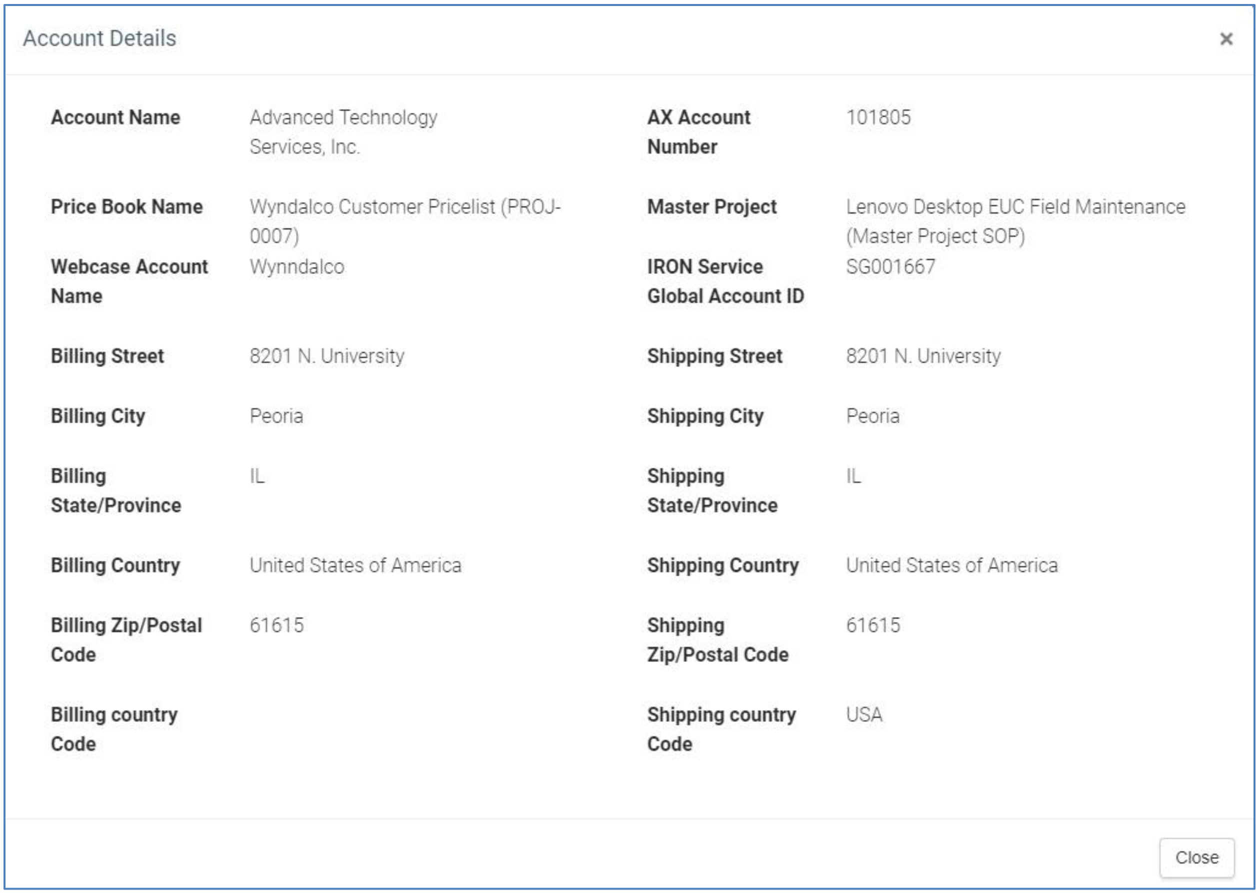
The partner, which was selected when user last logged, is selected by default in the **Account** section.

Fields marked with an asterisk are mandatory.

Tip: Click the *Tab Heading* or down arrow on the tab to minimize or maximize the tab.

2. Click the **Partner** name link in the **Account** section to view account details.

   An *Account Detail* pop-up displays as shown below:


Account Details ×

Account Name	Advanced Technology Services, Inc.	**AX Account Number**	101805
Price Book Name	Wyndalco Customer Pricelist (PROJ-0007)	**Master Project**	Lenovo Desktop EUC Field Maintenance (Master Project SOP)
Webcase Account Name	Wynndalco	**IRON Service Global Account ID**	SG001667
Billing Street	8201 N. University	**Shipping Street**	8201 N. University
Billing City	Peoria	**Shipping City**	Peoria
Billing State/Province	IL	**Shipping State/Province**	IL
Billing Country	United States of America	**Shipping Country**	United States of America
Billing Zip/Postal Code	61615	**Shipping Zip/Postal Code**	61615
Billing country Code		**Shipping country Code**	USA

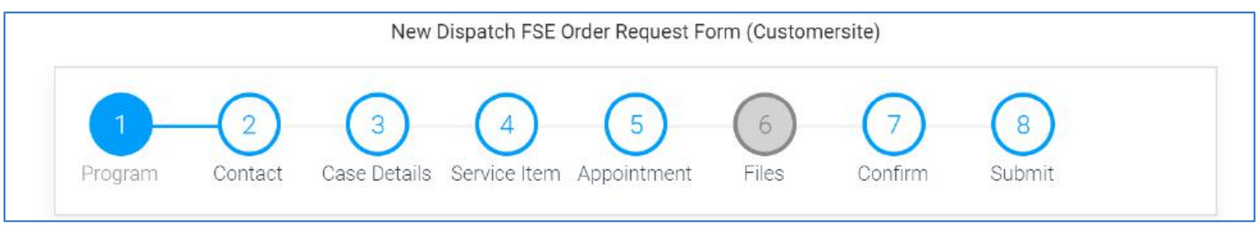
Close

Tip: Click the **Close** button or **X** (cross sign) to close this *Account Details* pop-up.

4.1 Create Case Web-Form Overview

This option allows you to create case (Dispatch FSE – Customer Site) using appropriate values in the required fields available in case creation web-form sections.

Below is the list of case creation web-form sections:



1) Account & Program Information
    a. Account Information
    b. Program Information
2) Case Contact Information
    a. Jobsite Selection

b. Case Contact Information

3) Case Details

a. Case Information

b. Case Additional Instructions (optional)

4) Service Catalog Selection: Incident Options

a. Standard Incident Type

b. Customer Incident Type

5) Appointment Setup

6) File Upload

7) Review/Confirm

8) Submit

Jobsites Selection: Understanding Jobsite Location Activation Status:

Each Jobsite needs to be registered in the portal prior to creating a new case. The list of registered Jobsites is available as a drop down by accessing: (2) Case Contact Information tab → Jobsite Location (Select Name)

1) **Pre-Registration**: These Jobsites are made available as “Activation Approved”.

   a. **Activation Approved**: These Jobsites meet standard SLA guidelines.

2) **New Registration Request**: Users can create a new jobsite from within the portal. For more information on the process to create a new Jobsite, please refer to section “6.1.3: Create, a New Jobsite Location”.

   a. All Newly Created Jobsite Locations are automatically added to the Jobsite selection list and made available for new case order request selection.

   b. All Newly registered jobsites are marked and made available as “Activation Pending.” For more information on upgrading the status to “Activation Approved” and SLA management for New Jobsites, please refer to Section “Case Order Configuration Options”.

Service Catalog Selection: Incident Options:

This form supports two types of create case requests using Service Catalog “Service Item Profile” selection.

- Standard Incident Type
- Customer Incident Type

Service Item (Ordering)		Standard Incident Profile	Custom Incident Profile	Example 1	Example 2
1	Service Profile, Talent Type	Default (Fixed)	Configurable	*Field Services EUC Deskside Support*	*Field Service Network Support*
2	Service Profile, Talent Level	Default (Fixed)	Configurable	*L1*	*L2*
3	Service Profile, Service Priority	Default (Fixed)	Configurable	*Next Business Day (NBD)*	*Same Business Day (SBD-4HRS)*
4	Service Profile, Coverage Hours	Default (Configurable)	Configurable	*Business Hours*	*Weekend Hours*
5	Event, Duration (PPM)	Default (Configurable)	Configurable	*2 Hours*	*4 Hours*

Standard Incident Profile: This is the "default" service profile as per the statement of work, created at the time of program jobsite registration.

- All pre-registered Jobsites are presented as status "Jobsite Activation Approved" for new "Case Creation".
- Users can add new Jobsites via this portal. These Jobsites are presented as "Jobsite Activation Pending" for new "Case Creation".
- All jobsites Pre-Set Default: uses Standard SLA Service Item Profile.

Custom Incident Profile: This option allows you to create your own "custom service profile" per incident. Here you can select Talent Type, Talent Level, and SLA Priority differing from the Program's Standard Incident Profile and specific for this case. A custom incident is processed as a special request, and all service SLAs are quoted and processed as best effort. Please review Section B4(b/d): "Case Order Configuration Options, "for additional information.

4.2 Create Case (Dispatch FSE – Customer site)

To create case (customer site), perform the following steps:

Select Orders → Create Case (Dispatch FSE – Customer site):

The *New Dispatch FSE Order Request Form (Customersite)* screen is being displayed. Refer Figure 4.1.

1. Complete the following fields in the ***(1) Account & Program Information*** tab.

Field	Instruction
Account ID	This field is prepopulated. **Note**: This field displays the **Account ID** of the Partner. This will remain same for all programs.
Account Name	This field is prepopulated. **Note**: This field displays the partner name of the company.
Program Reference Code	• Select the appropriate program reference code in the **Program Reference Code** drop-down list. **Note**: This is a unique code that corresponds to a specific Program as every Program has its own unique Program Code.

2. Complete the fields in the ***(2) Case Contact Information*** tab:

Field	Instruction
Jobsite Location (Select Name)	• Select jobsite location name for dispatch in the **Jobsite Location (Select Name)** drop-down list. **Note**: Each Jobsite needs to be registered in the Serviceo prior to creating a new case. The list of registered Jobsites is available as a drop down.
Jobsite Contact (Name) - End User or Ship To	• Type the name of End User or Ship-To in this field. **Note**: This person will be first point of contact with whom IRON Service Global will coordinate arrival.
Jobsite Contact (Email) - End User or Ship To	• Type the E-Mail ID of End User of Ship-To in this field. **Note**: This E-Mail ID is used by IRON Service Global to coordinate arrival.
Jobsite Contact (Phone) - End User or Ship To	• Type phone number of End User or Ship-To in this field.

	Note: This phone number on which IRON Service Global will reach out to coordinate arrival of engineer.

3. Enter reference case number (Client Case Number or Purchase Order Number) in the **Case Reference (Partner Case Number)** field in the ***(3a) Case Details*** tab.
   Note: This number will be used for reporting and billing references.
4. Type the short summary related to the case in the **Case Title (Summary)** field in the ***(3a) Case Details*** tab.
5. Type the detailed case description in the **Case Description (Details)** text box in the ***(3a) Case Details*** tab.
6. Type special instruction related to the case, if any, in the **Special Instruction for Service Engineer (Private Message)** text box in the ***(3a) Case Details*** tab.
   Note: Here, users can type instructions for "Field Service Engineer", which are not part of Custom Work Instructions.
7. Choose the next step:

If you want to…	Then…
Create Standard Service Profile (Default)	1. Select the **Create Default Incident: Standard Service Profile** option. **Note**: When you select the **Create Default Incident: Standard Service Profile**, the standard service profile is selected against this case. Stand Service Profile uses preset Program Default.
Create Custom Service Profile	1. Select the **Create Custom Incident: Custom Service Profile Request** option to create your own "custom service profile" per incident. The *Create Case* screen updates with Create Custom Incident: Custom Service Profile Request fields allowing you to select Talent

	Type, Talent Level, and SLA Priority differing from the Program's Standard Incident Profile and specific for this case. 2. Select the required service type in the **Service Type** drop-down list. **Tip**: You can any of the following type of services: • Desk-side Support • IMAC • Break/Fix Service 3. Select the relevant talent type in the **Service Engineer (Talent Type)** drop-down list. **Tip**: You can select following talent types, subject to availability for a given jobsite location: • Field Services EUC Deskside Support • Field Service Server/Storage HW B/F Support • FTE-FEEUC-TEC-MSFT • Field Service Network Support 4. Select the appropriate expertise level of engineer in the **Service Engineer (Expertise Level)** drop-down list. **Tip**: You can select the following levels of technical expertise, subject to availability for a given jobsite location: • Level 1 (L1) • Level 2 (L2) 5. Select the correct SLA in the **Service Dispatch Priority (SLA Requested)** drop-down list.

	Tip: You can select the following dispatch priorities, subject to availability for a given jobsite location: • P1 (SBD4H), Same Business Day - 4 Hours • P3 (NBD), Next Business Day • P4 (2BD), 2 Business Days • P5 (3BD), 3 Business Days • P6 (5BD), 5 Business Days 6. Select the duration of event application for maintenance in the **Maintenance Event Duration (PPM* Hours)** drop-down list. 7. Select the required number of service engineers in the **Number of Service Engineers?** drop-down list.

8. Choose the next step:

If you want to…	Then…
Request for Customer Appointment Setup (Call Customer)	Select the **Customer Appointment Setup Request (Iron Service Global to Call Customer)** option. **Note**: Here, a request is sent to Iron System to call End-Customer and setup an appointment.
Request for SLA Priority: SBD	Select **Dispatch Now (SLA Priority: SBD)** option for same business day dispatch. This is a Same Business Day (SBD) premium service contract option.
Pre-Schedule an Appointment	Select the **Pre-Scheduled Appointment (Enter Date/Time (Local Time Zone) below)** option if your Service Desk has already setup an appointment with End-Customer.

	To pre-schedule your appointment, follow the below steps. 1. Type or select the Customer Appointment Schedule (Start) Date in the **Pre-Schedule Customer Appointment Schedule (Start) Date** field. **Tip**: Click anywhere in the field and then select the date from the calendar that displays. 2. Type or select Customer Appointment Schedule Start Hour in the **Pre-Schedule Customer Appointment Schedule (Start) Hour** field. 3. Type or select Customer Appointment Schedule Start Minute in the **Pre-Schedule Customer Appointment Schedule (Start) Minute** field.

9. Click the **File Upload** button in the **File Upload** tab to upload any relevant document required in this case.
10. Click the **Review & Confirm** button to review and confirm the details before case creation.
    Note: Review the **Order Summary** section on the right side for accuracy prior to new case submission before confirming the case creation.

5 Service Manager

The purpose of Service Manager is to make the service management easier and efficient. This module of the PMS……. More information will be added at a later stage.

5.1 Service Manager Console (PMS)

The Case List view provides a single unified listing of all cases created for a given partner in the Serviceo system.

Here, users can perform text-based case searches, and can filter the case list by Program Name, Region, Country, Jobsite Location, Order Type, and Date Range.

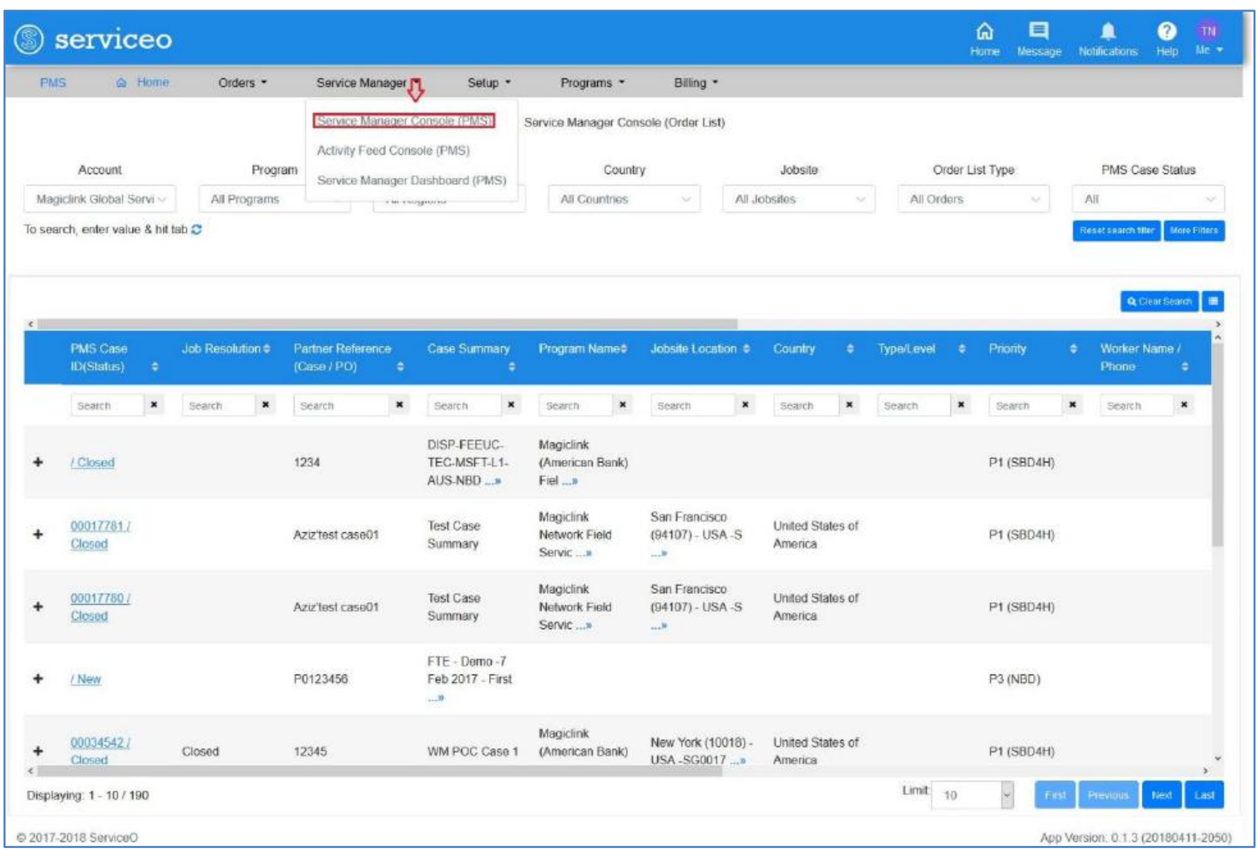
To view the Order List (PMS), perform the following steps:

1. Click the **Service Manager** located next to the **PMS** *Home* icon and then click the **Service Manager Console (PMS)** to access the order list.

   Service Manager → Service Manager Console (PMS):

   The *Service Manager Console (Order List)* screen appears with auto-populated **Account Name** in the **Account** drop-down list as shown in Figure 5.1.

Figure 5.1: Service Manager Console (Order List) screen



Note: The Account name (Company name) in the Account drop-down list is auto-selected.

Tip: Click the icon to refresh the *Orders-list* screen. Click the icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

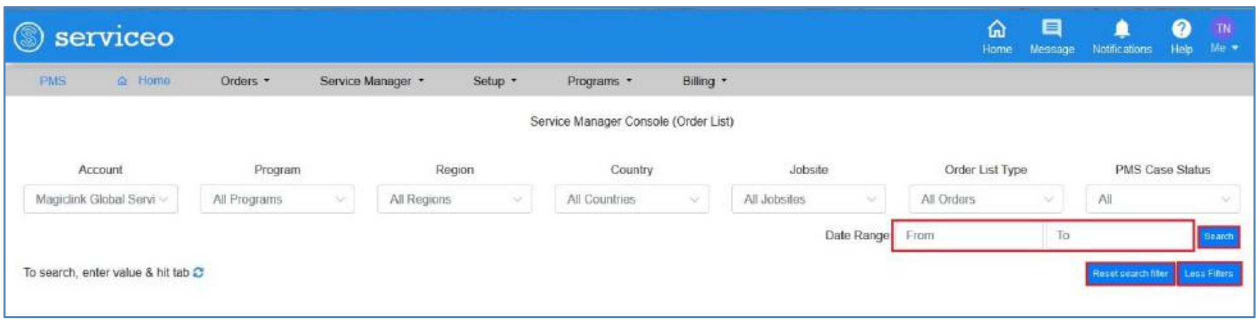
2. Select the relevant program in the **Program** drop-down list for which you want to view order list.

   The **Order List** gets updated on the *Service Manager Console (Order List)* screen for the corresponding "**Program**" if the selected **Program** has orders.

3. Select the appropriate values in the different search fields to narrow down your search results.

4. To further narrow down your search results and viewing options, click the **More Filters** button.

   The *Service Manager Console (Order List)* screen updates with more search fields as shown in the below figure:

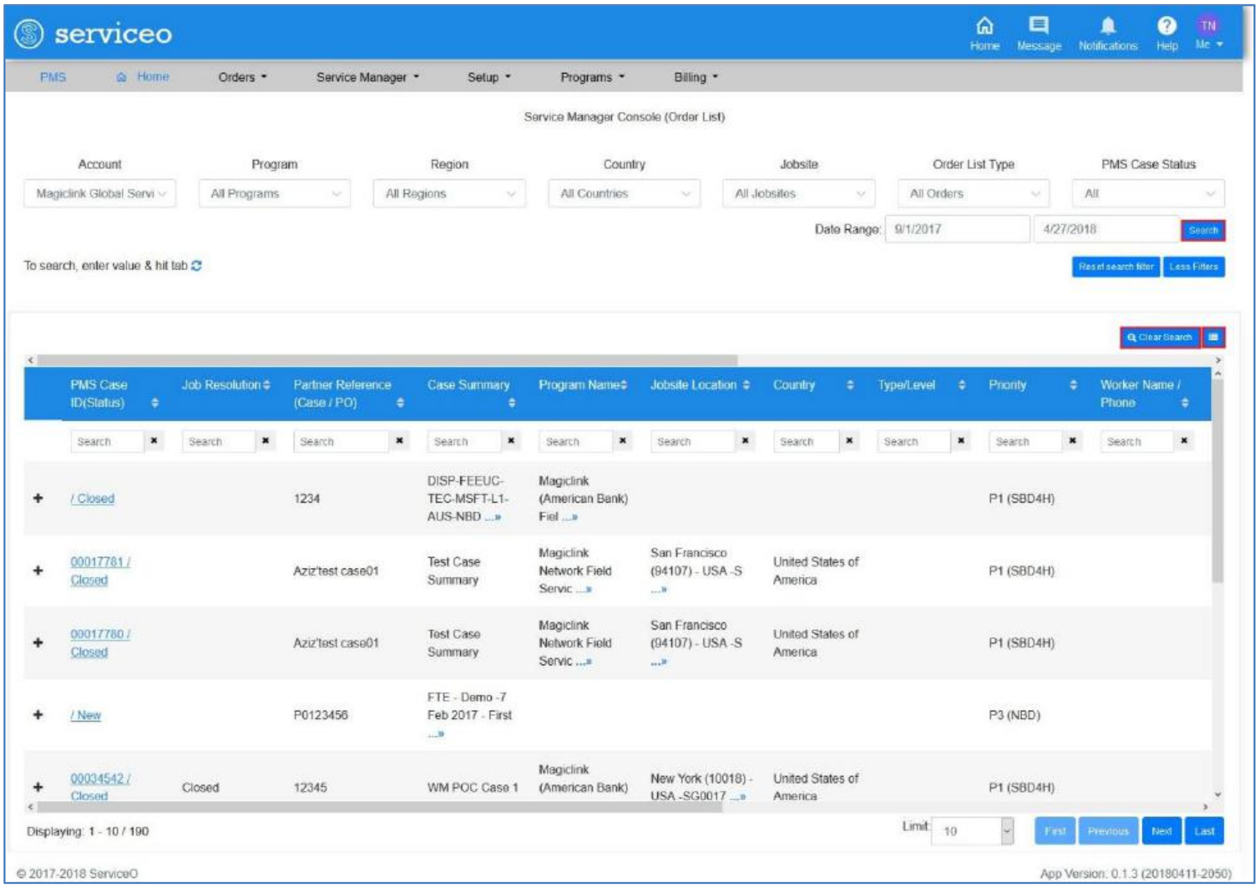


5. Select **Date Range** in the **From** and **To** Date fields and then click the **Search** button for viewing orders within the purged date range.

   Tip: Click anywhere in the **From** and **To** fields and then select date on the calendar that appears. Click the **Less Filters** to hide extra fields that appear after clicking on the **More Filters** button. If you want to reset search criteria, click the **Reset Search Filter** button.

   The *Service Manager Console (Order List)* screen updates with records as per selected date range as shown in Figure 5.2.

Figure 5.2: Service Manager Console (Order List) screen – Search Results



Tip: You can search any specific order by typing the relevant values in the different search fields.

Click the **Clear Search** button to clear the fetched records on the screen. Click the icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

6. Click the **+** (plus sign) to view order details in expanded form.

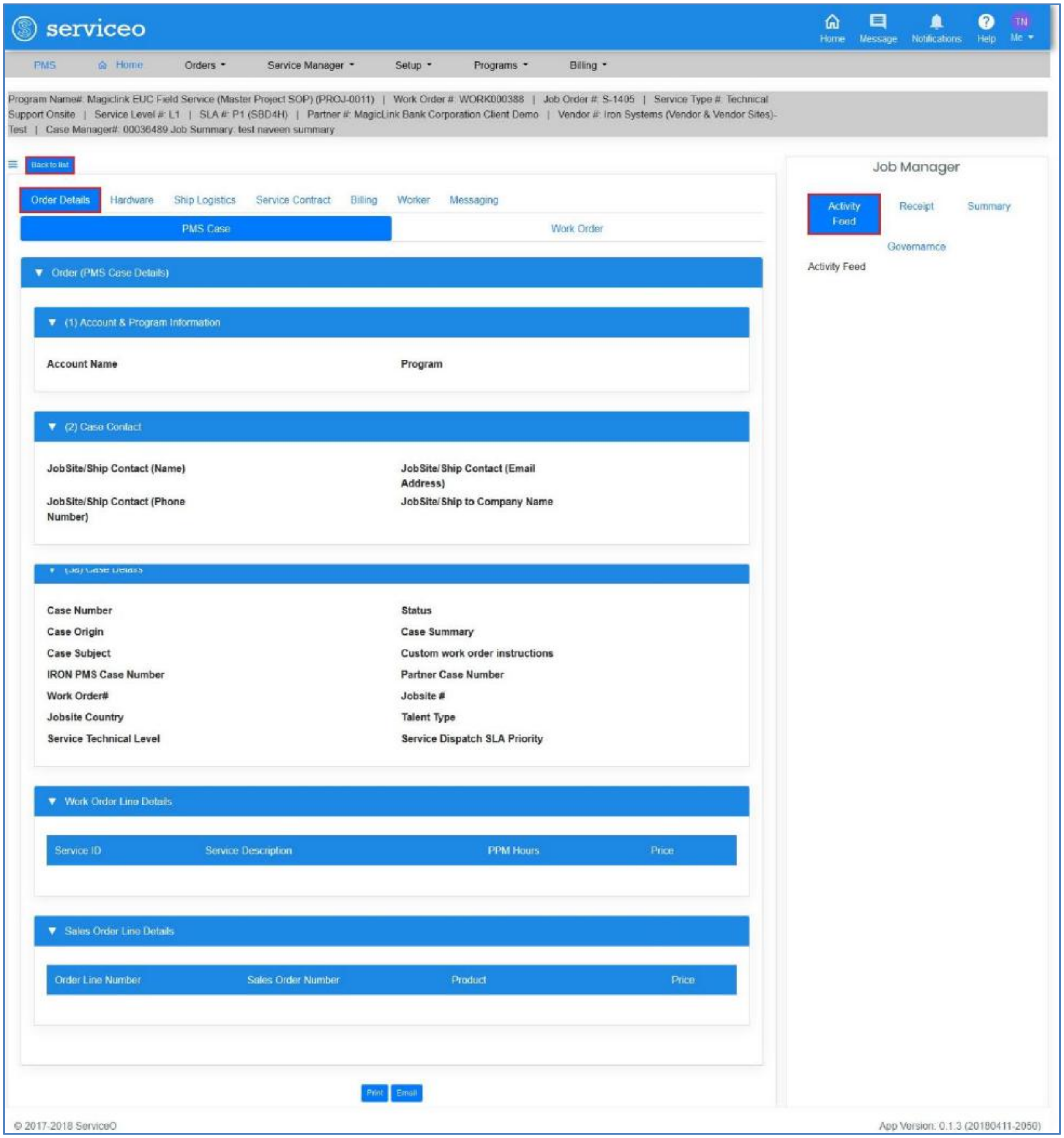
   The **Order Details** appears in expanded form as shown in the figure below:

Tip: Click the **–** (minus sign) to close the expanded form.

7. Click the **PMS Case ID (Status)** link next to the **+** (plus sign) to view case details.

The *Case Details* screen appears as shown in Figure 5.3.

Figure 5.3: Case Details screen



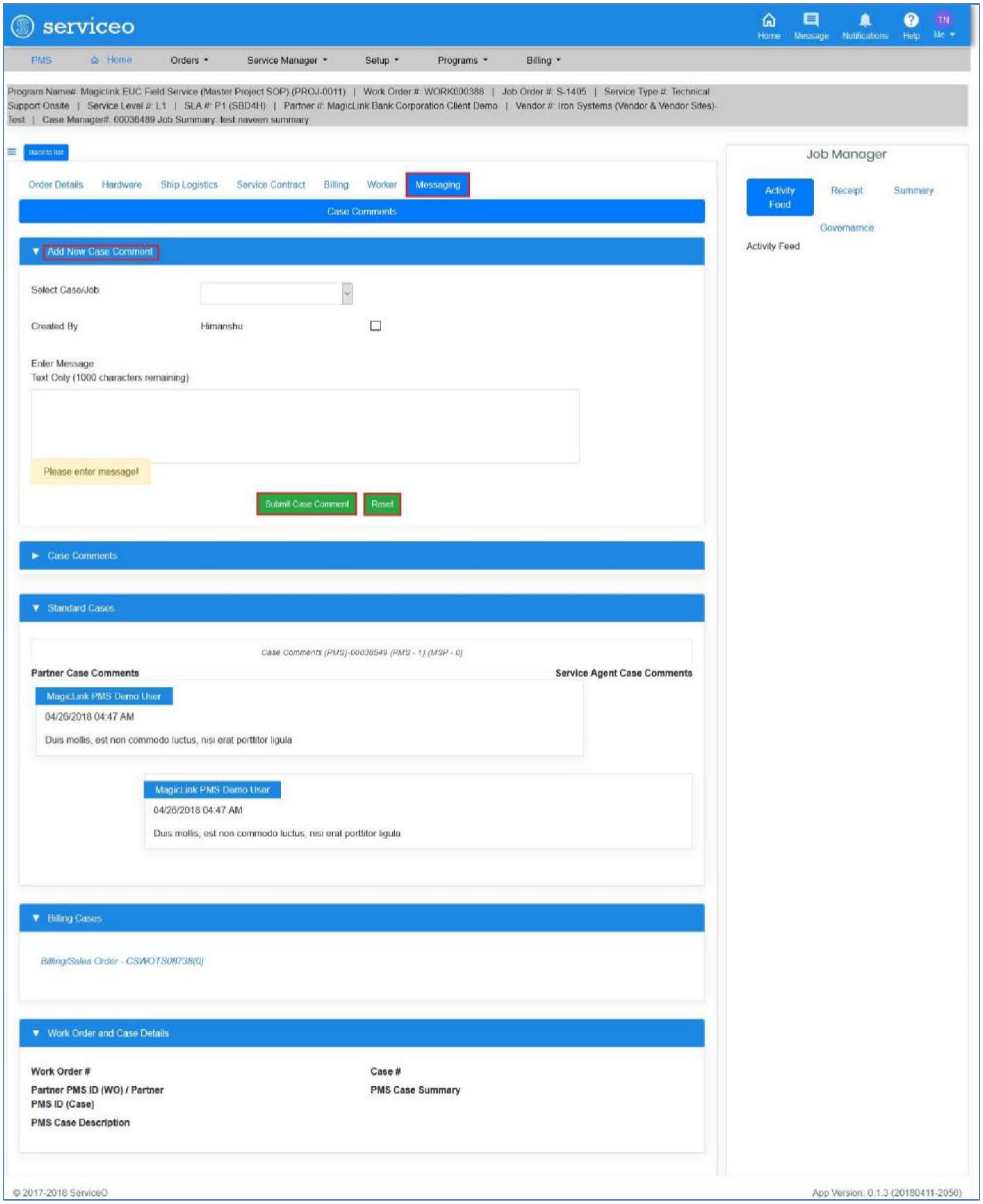
Note: The *Case Details* screen displays with *Order Details*, *Hardware*, *Ship Logistics*, *Service Contract*, *Billing*, *Worker*, *Messaging* tabs. The *Order Details* tab display by default. The *Order Details* tab comprises of *PMS Case* and *Work Order* tabs. In the left side of screen, under **Job Manager** section, there are three tabs, namely *Activity Feed*, *Receipt*, and *Summary* tabs appear.

Case Details screen supports the following key features:

Service Manager Details View – Standard Features List			
1	Order Details	PMS Case	Partner Management System (PMS) Case, the master reference number used for all communications with IRON Service Global service agents, and Billing.
		Work Order	Work order, available only for "custom incidents".
2	Worker	Worker Info	Field Service Engineer (FSE) Name and Phone Number.
		Appointment	Worker Scheduling Information.
3	Messaging		Case Messaging Console.
4	Job Manager	Order Activity Feed	Case Activity Update: (1) New Case Creation (2) Case Comment Update (3) Case Status Update (4) Appointment (5) Worker (FSE) Assignment.
		Receipt	Copy of the original "create case" web form for reference.
		Summary	Overview of Service Delivery Status.

8. Click the *Messaging* tab to open case messaging console. Refer Figure 5.3.

   The *Case Messaging Console* appears as shown below:



9. Select the relevant case/job in the **Select Case/Job** drop-down list in the *Add New Case Comment* tab.
10. Type your comment for Iron Service Agent in the text box.

Note: This text box supports up to 1,000 characters per comment.

11. Click the **Submit Case Comment** button to send the comments.

    Tip: Click the **Reset** button to change/modify entered comments.

5.2 Activity Feed Console (PMS)

The Activity Feed Console logs the consolidated list of all activities/events. It provides centralized view of all cases updates in the PMS System.

The list of activity includes any updates to PMS case status, case messages, appointment date, worker Contact information.

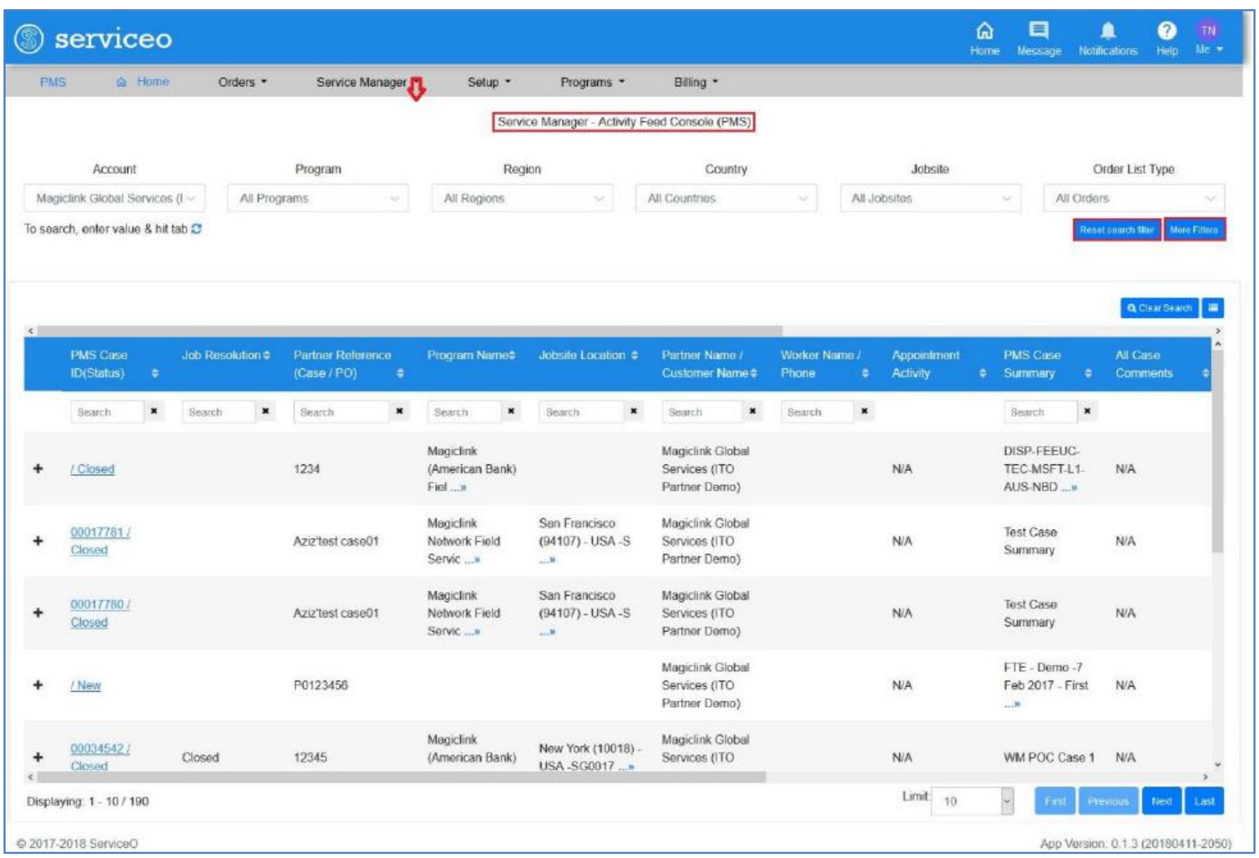
To view the Activity Feed Console (PMS), perform the following steps:

1. Click the **Service Manager** located next to the **PMS** *Home* icon and then click the **Activity Feed Console (PMS)** option to access the Activity Feed Console.

   Click Service Manager → Activity Feed Console (PMS)

   The *Service Manager - Activity Feed Console (PMS)* screen appears with auto-populated Account Name in the **Account** drop-down list as shown in Figure 5.4.

Figure 5.4: Service Manager - Activity Feed Console (PMS) screen



Tip: Click the icon to refresh the *Service Manager - Activity Feed Console (PMS)* screen.

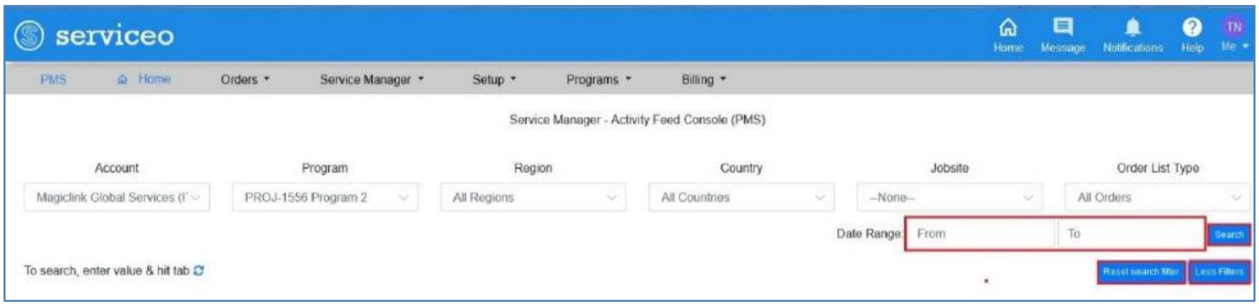
2. Select the relevant program in the **Program** drop-down list for which you want to view Case Activity list.

   The **Activity Feed** gets updated on the *Service Manager - Activity Feed Console (PMS)* screen for the corresponding "**Program**" if the selected **Program** has case orders.

3. Select the appropriate values in the different search fields to narrow down your search results.

4. To further narrow down your search results and viewing options, click the **More Filters** button.

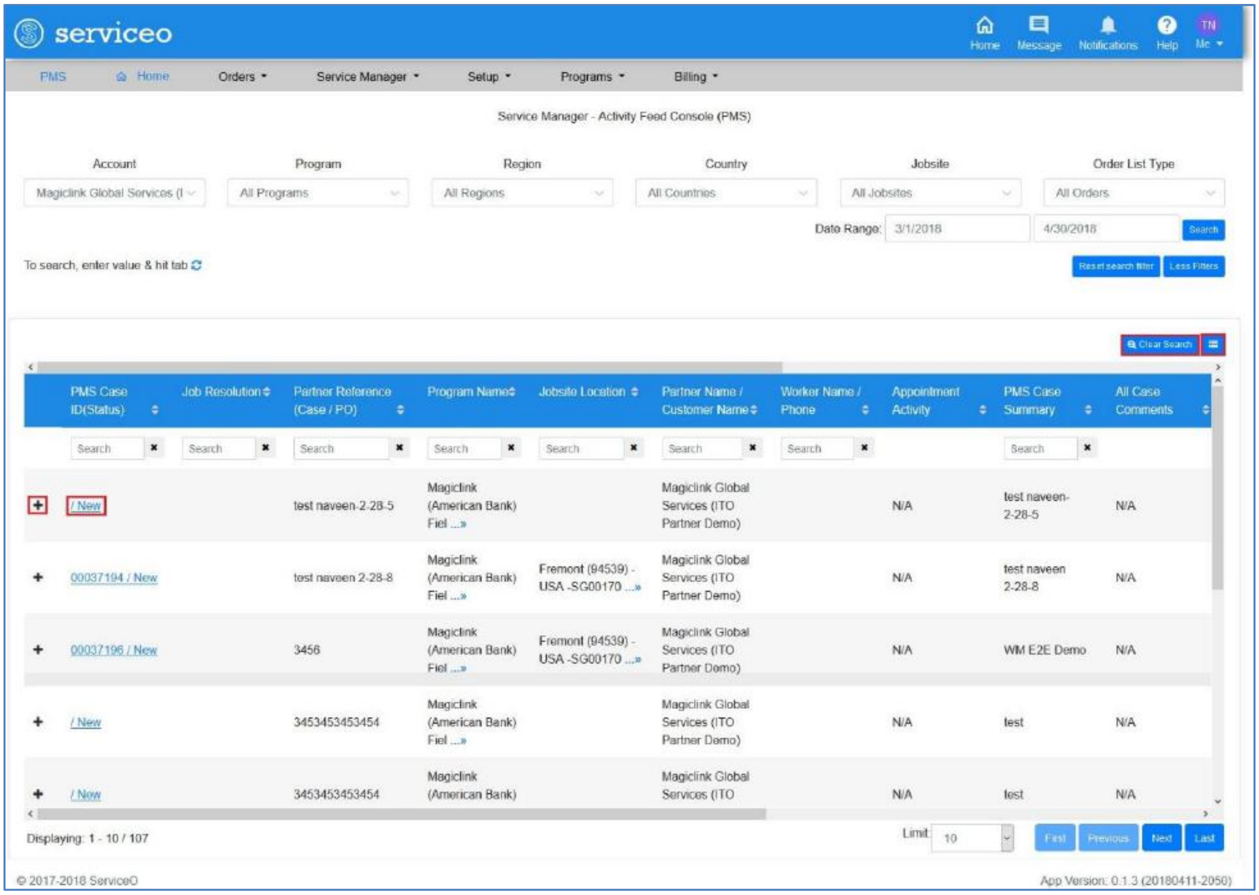
   The *Service Manager - Activity Feed Console (PMS)* screen updates with more search fields as shown in the below figure:



5. Select **Date Range** in the **From** and **To** Date fields and then click the **Search** button for viewing Case Activity within the purged date range.

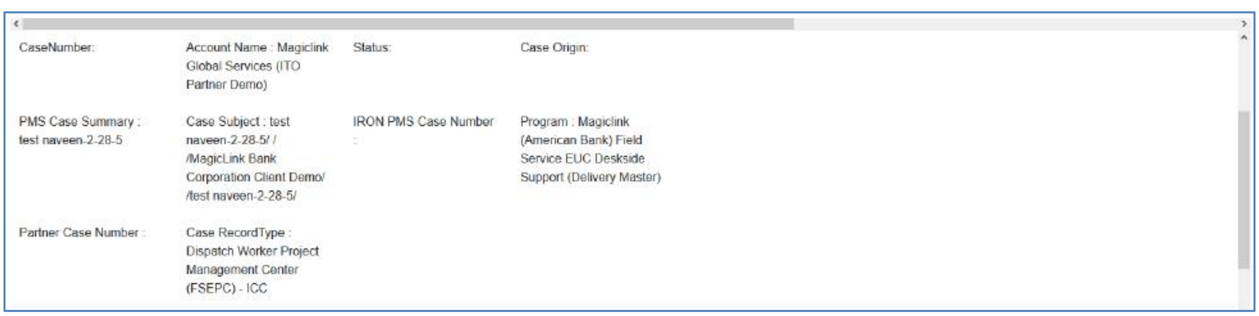
   Tip: Click anywhere in the **From** and **To** fields and then select date on the calendar that appears. Click the **Less Filters** to hide extra fields that appear after clicking on the **More Filters** button. If you want to reset search criteria, click the **Reset Search Filter** button.

   The *Service Manager - Activity Feed Console (PMS)* screen updates with records as per selected date range as shown in the below figure:



Tip: You can search any specific Case Activity by typing the relevant values in the different search fields. Click the **Clear Search** button to reset search criteria. Click the icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

6. Click. the **+** (plus sign) to view Case Activity details in expanded form.

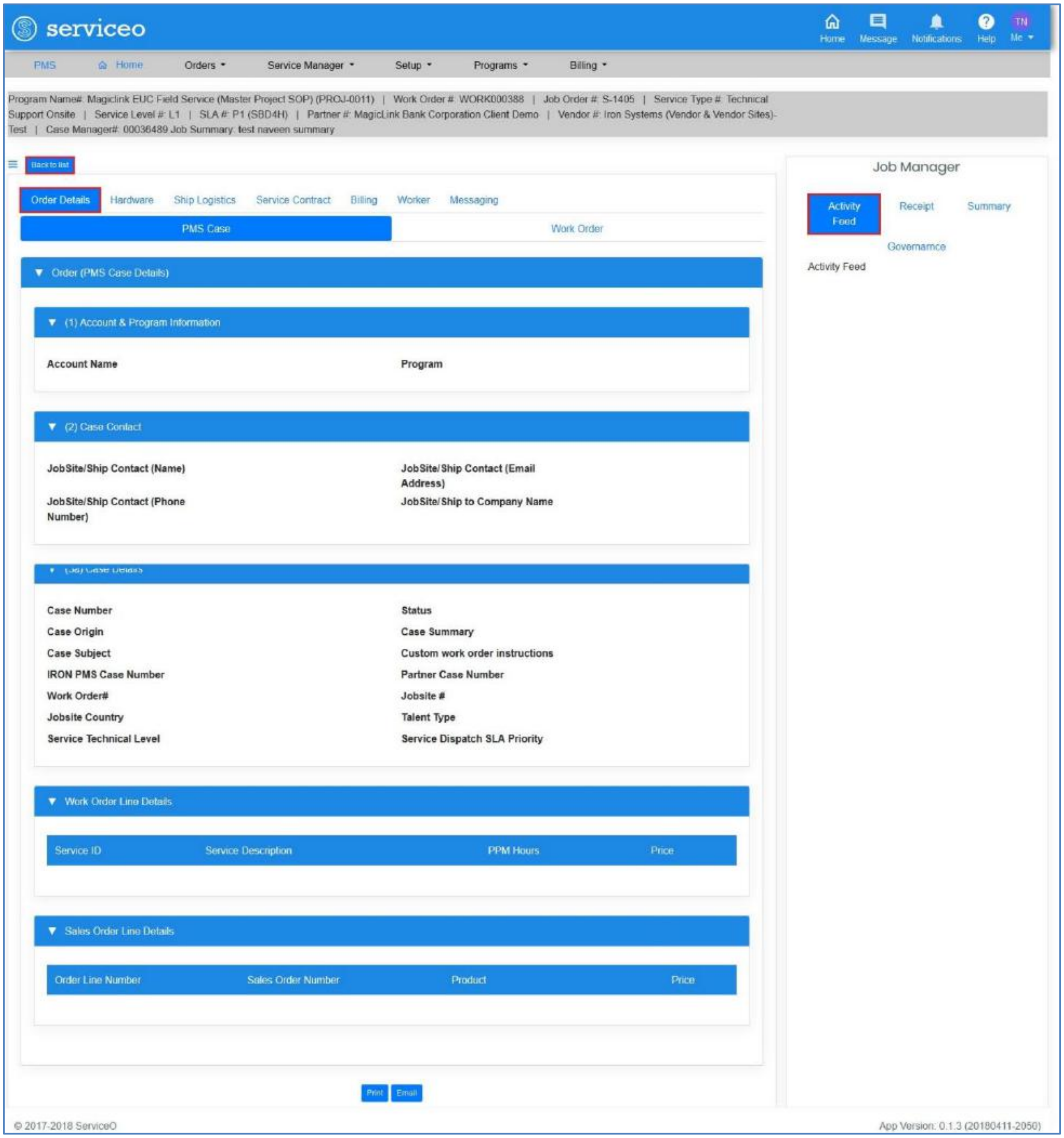


Tip: Click the **–** (minus sign) to close the expanded form.

7. Click the **PMS Case ID (Status)** link next to the **+** (plus sign) to view.

   The *Case Details* screen appears as shown in Figure 5.5.

Figure 5.5: Case Details screen



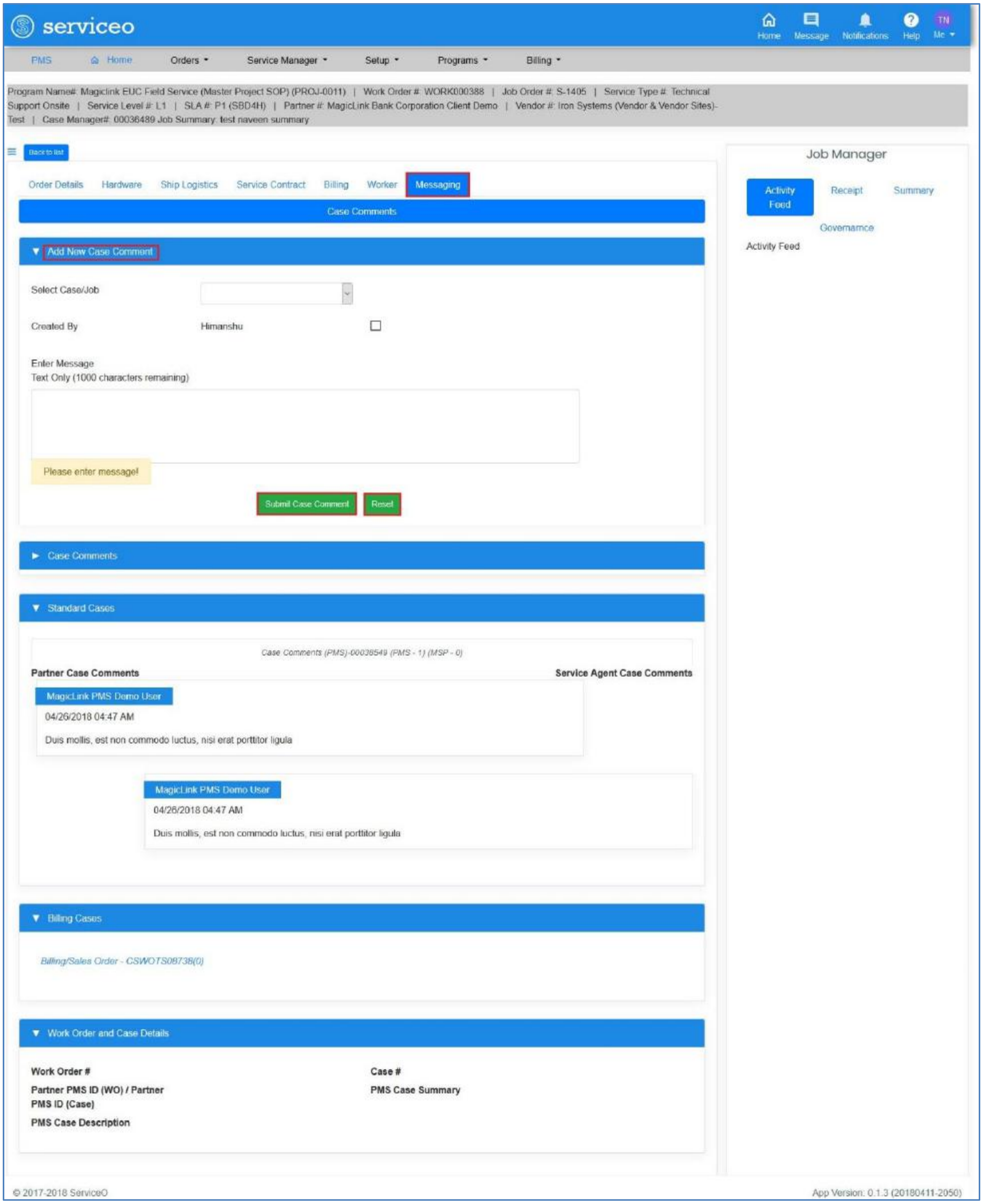
Note: The *Case Details* screen displays with *Order Details*, *Hardware*, *Ship Logistics*, *Service Contract*, *Billing*, *Worker*, *Messaging* tabs. The *Order Details* tab display by default. The *Order Details* tab comprises of *PMS Case* and *Work Order* tabs. In the left side of screen, under **Job Manager** section, there are three tabs, namely *Activity Feed*, *Receipt*, and *Summary* tabs appear.

Case Details screen supports the following key features:

Service Manager Details View – Standard Features List			
1	Order Details	PMS Case	Partner Management System (PMS) Case, the master reference number used for all communications with IRON Service Global service agents, and Billing.
		Work Order	Work order, available only for "custom incidents".
2	Worker	Worker Info	Field Service Engineer (FSE) Name and Phone Number.
		Appointment	Worker Scheduling Information.
3	Messaging		Case Messaging Console.
4	Job Manager	Order Activity Feed	Case Activity Update: (1) New Case Creation (2) Case Comment Update (3) Case Status Update (4) Appointment (5) Worker (FSE) Assignment.
		Receipt	Copy of the original "create case" web form for reference.
		Summary	Overview of Service Delivery Status.

8. Click the *Messaging* tab to open case messaging console. Refer Figure 5.5.

   The *Case Messaging Console* appears as shown below:



9. Select the relevant case/job in the **Select Case/Job** drop-down list in the *Add New Case Comment* tab.
10. Type your comment for Iron Service Agent in the text box.

Note: This text box supports up to 1,000 characters per comment.

11. Click the **Submit Case Comment** button to send the comments.

    Tip: Click the **Reset** button to change/modify entered comments

5.3 Service Manager Dashboard (PMS)

The Service Manager Dashboard (PMS) allows you to view and analyze the cumulative data that provides the status of your Cases and other important details.

The Dashboard also displays status of cases in graphics on a single screen in real time environment. It pulls relevant information in real time that helps you to view key information. This is the place where you get real time status of cases as per Jobsite Country. This capability allows you to make quick analysis.

This Dashboard also allows to use filters tab to narrow down your PMS Chart report and viewing option. Here, you can also download entire data in the Excel format.

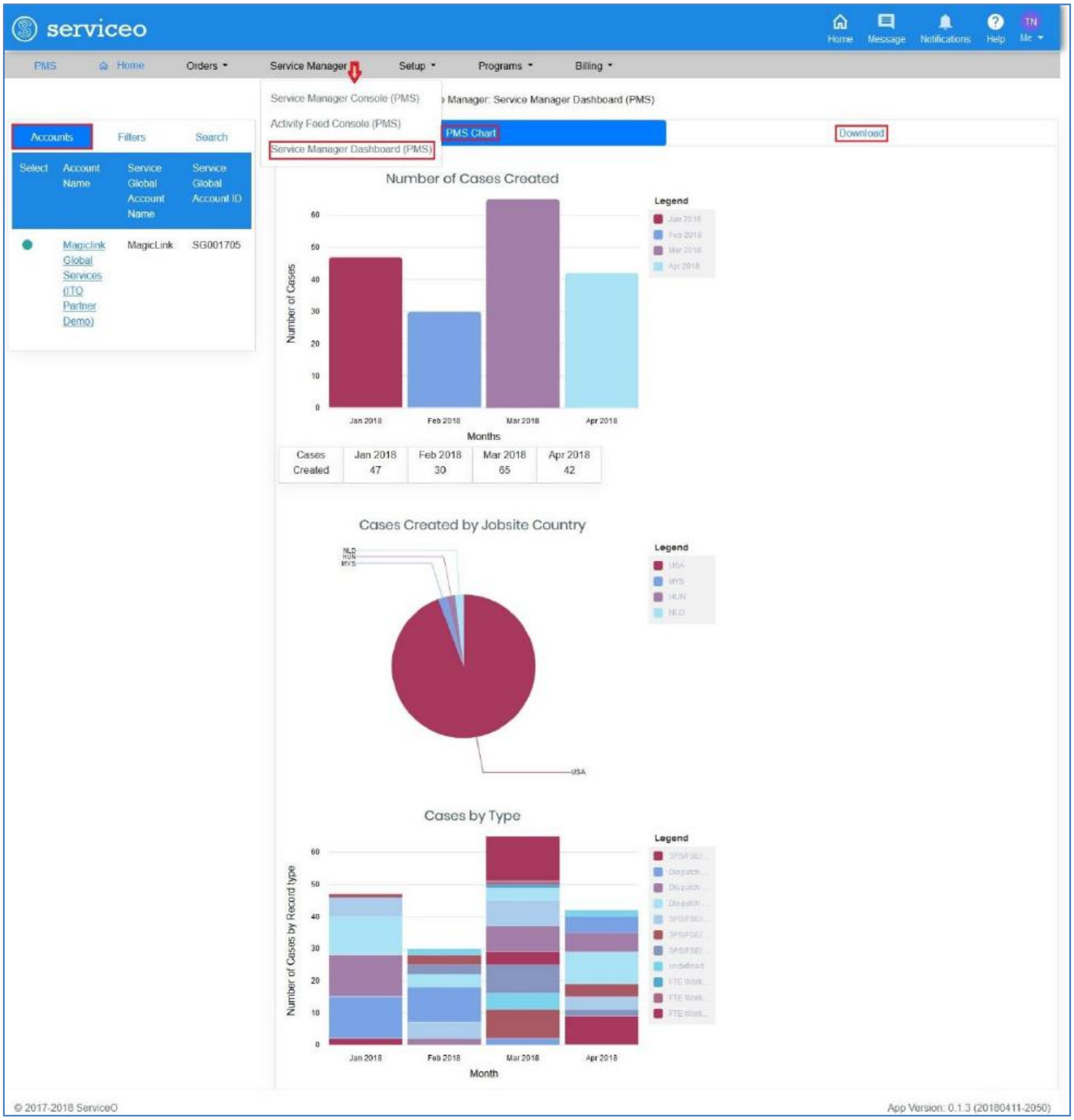
To access Service Manager Dashboard (PMS). Perform the following steps:

1. Click the **Service Manager** located next to the **PMS** *Home* icon and then click the **Service Manager Dashboard (PMS)** option to view the dashboard.

   Click Service Manager → Service Manager Dashboard (PMS):

   The *Service Manager: Service Manager Dashboard (PMS)* screen appears with the *Accounts*, *Filters*, and *Search* tabs in the left side of the screen and the *PMS Charts* and *Download* tabs in the middle of the screen. Refer Figure 5.6.

Figure 5.6: Service Manager: Service Manager Dashboard (PMS) screen



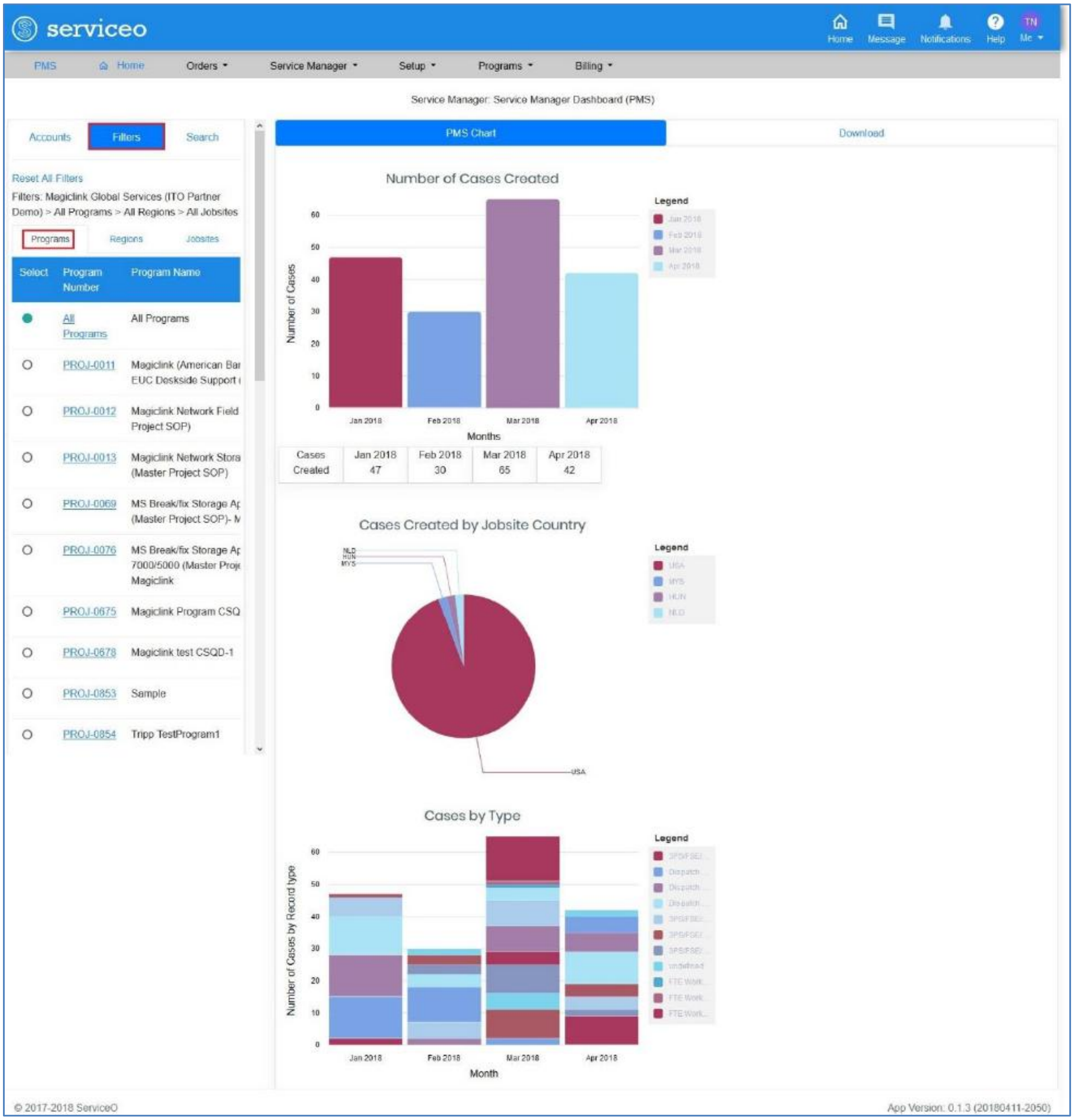
Note: The *Service Manager: Service Manager Dashboard (PMS)* screen displays the dashboard for the **Account**, you log on to the Serviceo.

The *PMS Chart* tab displays the total number of cases created in the Serviceo System in graphics. It also displays the number of cases by their record type.

2. Click the *Filters* tab to narrow down your viewing option in the left side of the screen. Refer Figure 5.6.

The *Service Manager: Service Manager Dashboard (PMS)* screen appears with *Filters* tab options containing the *Programs*, *Regions*, and *Jobsites* tabs. The *Programs* tab displays by default. Refer Figure 5.7.

Figure 5.7: Service Manager: Service Manager Dashboard (PMS) screen – Filters tab



Tip: The *Service Manager: Service Manager Dashboard (PMS)* screen displays the PMS Chart for all programs, because in the *Programs* tab, All Programs option is auto-selected when you click the *Filters* tab.

3. Select the **Program Number** for which you want to view PMS Chart in the *Filters* tab.

   Tip: As you select the **Program Number** in the *Filters* tab, the *PMS Chart* tab updates with records of the selected Program Number.

4. Click the *Regions* tab and then select the **Region** for which you want to narrow down your viewing option.

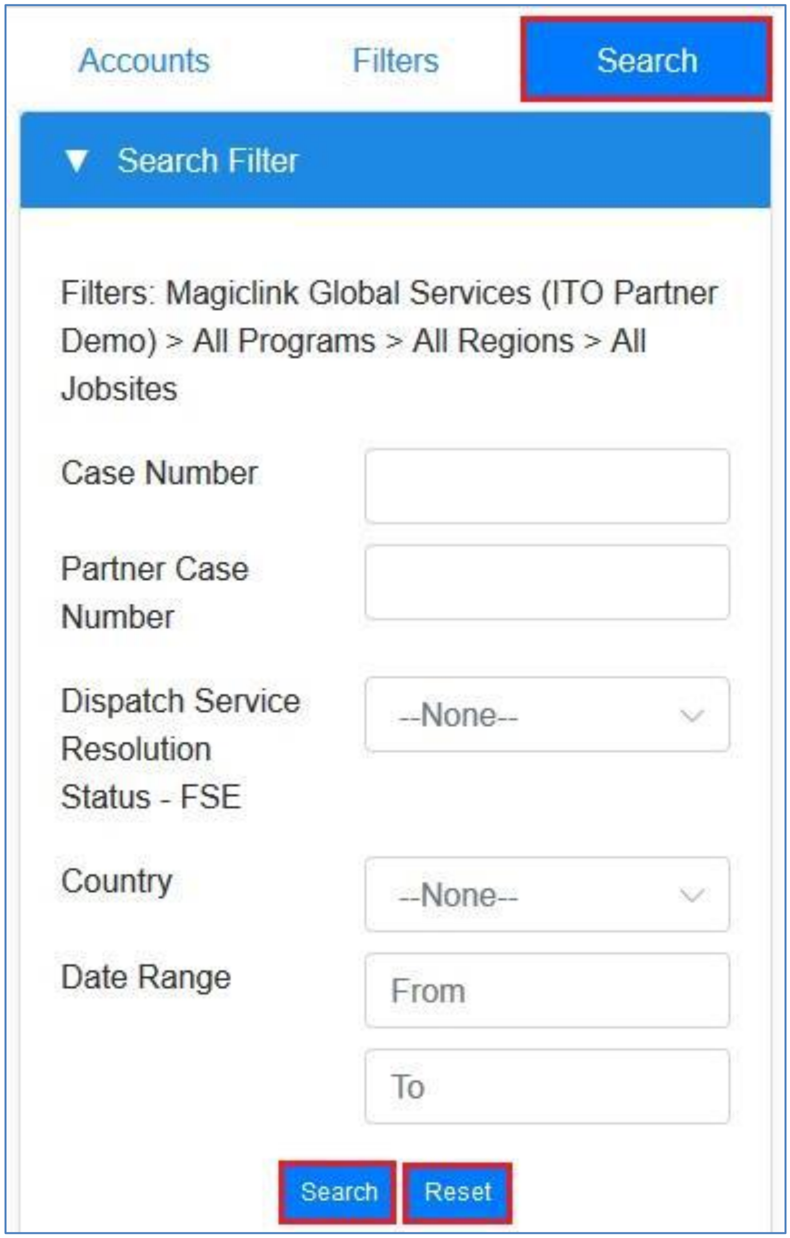
5. Click the *Jobsites* tab and then select the **Jobsites** for which you want to view the chart.

   Tip: The *Service-manager* screen gets auto-refreshed with each selection.

6. Click the ***Search*** tab in the left side of the *Service-manager* screen to view Case-specific PMS Chart. Refer Figure 5.6.

   The *Service Manager: Service Manager Dashboard (PMS)* screen updates with *Search Filters* tab in the left side of the screen as shown Figure 5.8.

Figure 5.8: Service Manager: Service Manager Dashboard (PMS) screen – Search tab



7. Type the case number for which you want to view PMC Chart in the **Case Number** field.
8. Type the partner case number in the **Partner Case Number** field.
9. Select the relevant Service Resolution Status in the **Dispatch Service Resolution Status – FSE** drop-down list.

   Tip: There are four Dispatch Service Resolution Status states:

   - New -
   - In-Progress -
   - Resolved -

- Closed -

10. Select the country in the **Country** drop-down list.
11. Select the date range in the **From** and **To** fields and then click the **Search** button to view records.

    Tip: Click anywhere in the **From** and **To** fields and then select the dates on the calendar that displays. Click the **Reset** button to reset the search criteria.
12. Click the *Download* tab to download entire data in the Excel format.

6 Setup

This module provides key functionalities overview related to self-managing Global Jobsite Location, including creating new jobsite registration requests.

6.1 Jobsite Setup (PMS)

Here, you can configure Jobsite Setup, view existing Jobsite Locations, update a Jobsite Location, and create a new Jobsite Location.

In the Serviceo, a new Jobsite can be added to Program location list through the following ways:

- Enter Address and Search for Nearby Service Zone
- Select a preferred Nearby Service Zone to Create a New Jobsite

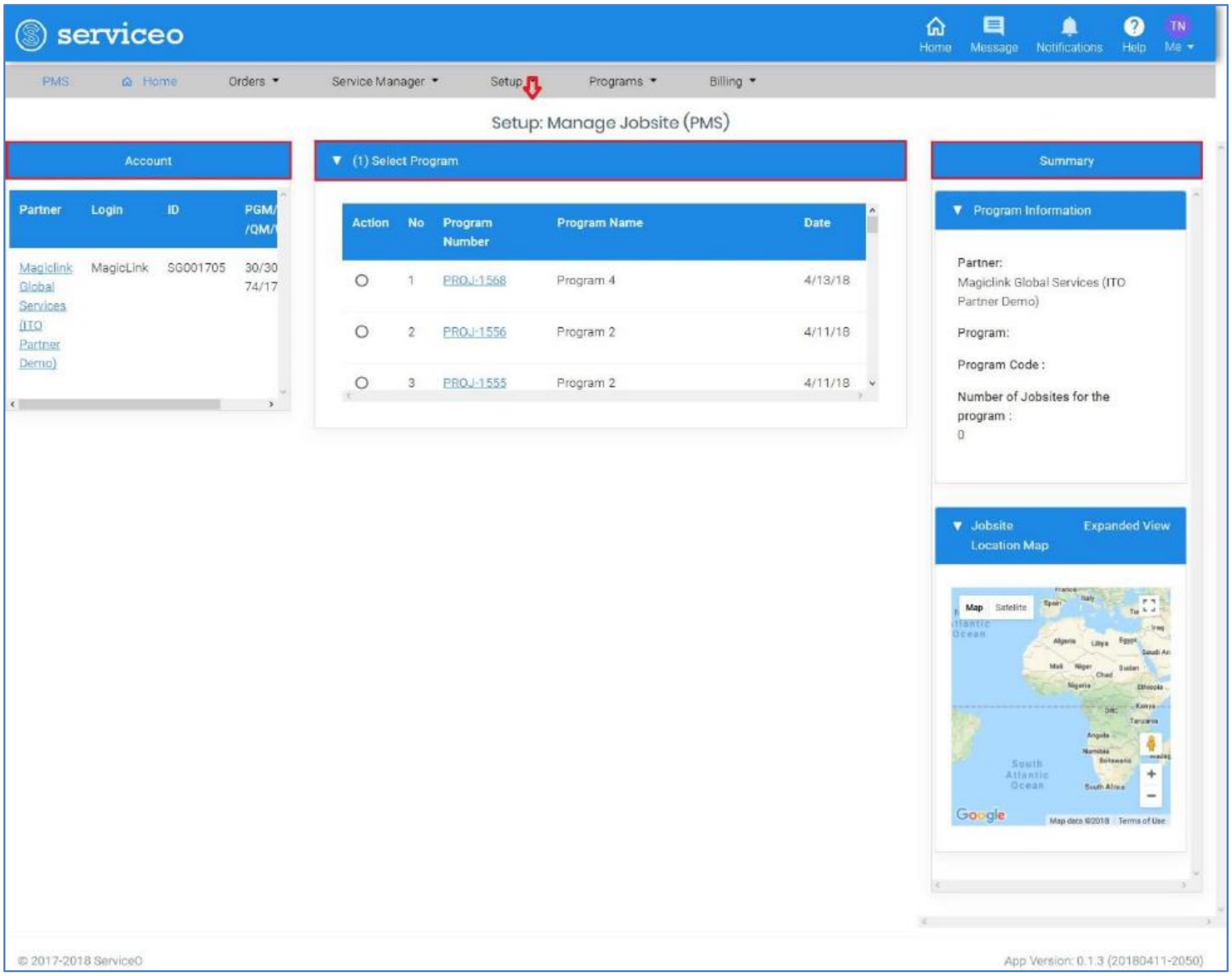
To access Jobsite Setup screen for PMS, perform the following steps:

1. Click the **Setup** located next to the **PMS** *Home* icon and then click the **Jobsite Location (PMS)** option at the top of the *home* page.

   Click Setup → Jobsite Location (PMS):

   The *Jobsite-setup* screen appears as shown in Figure 6.1.

Figure 6.1: Jobsite-setup screen



Note: The *Jobsite-setup* screen appears with the **Account** section at the left side of the screen. It displays a list of partners including their login, ID and other details. In the right side of the *Jobsite-setup* screen, the **Summary** section is being displayed that contains *Program Information* and *Jobsite Location Map* tabs.

The **Summary** section lists program information for the selected **Partner** along with its **Jobsite Location** details on the Map.

Tip: Click the **Account** name next to the **Select** column in the **Account** section to view Account Details. Click the **Program Number** next to **Action** column in the *(1) Select Program* tab to view the program details.

6.1.1 Viewing Jobsite List

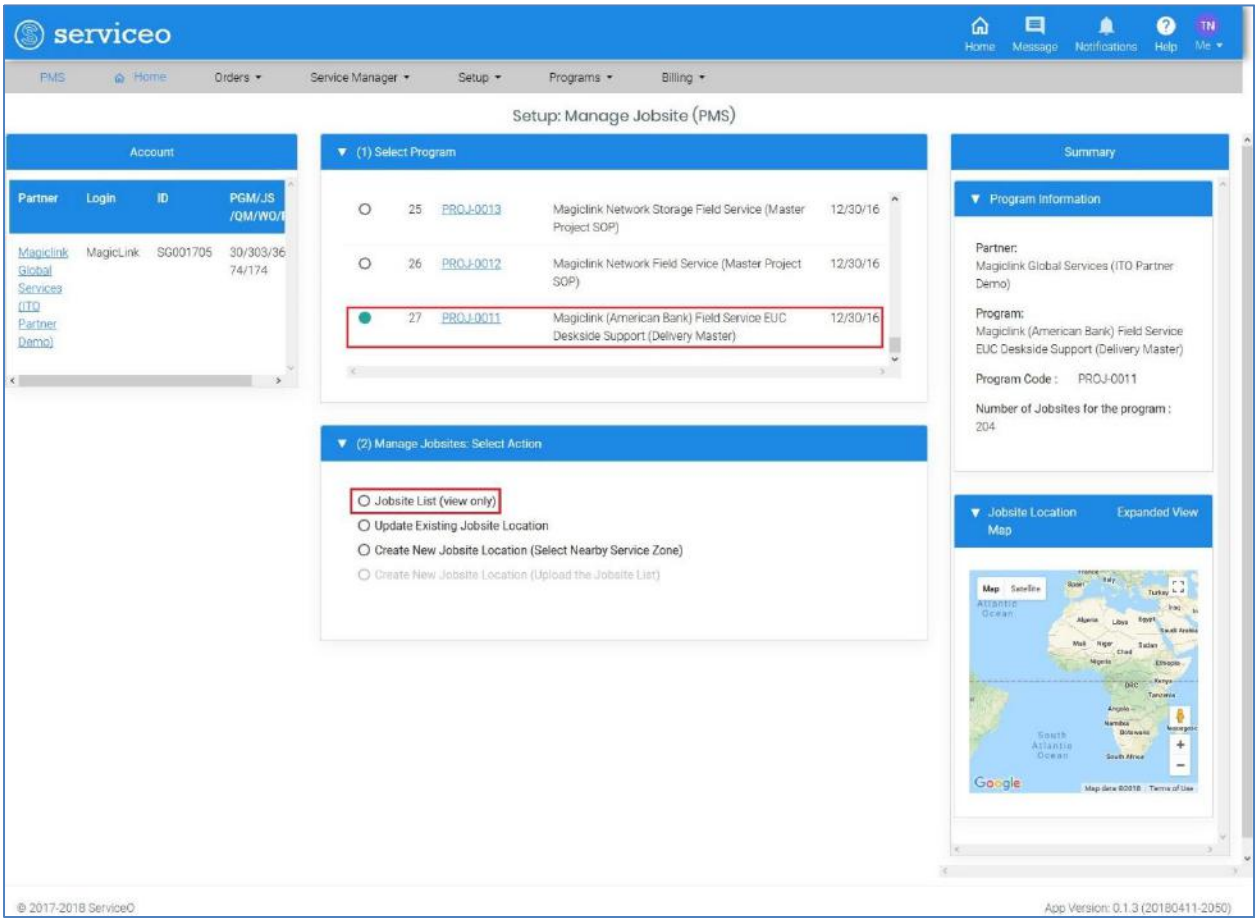
Here, you can view the list of all Jobsite Locations pre-configured for a given program.

Click Setup → Jobsite Location (PMS); and then perform the following steps on the *Setup: Manage Jobsite (PMS)* screen. Refer Figure 6.1.

1. Select the program in the ***(1) Select Program*** tab for which you want to view Jobsite Locations.

   The *Jobsite-setup* screen updates with *(2) Manage Jobsites: Select Action* tab as shown in Figure 6.2.

   Figure 6.2: Jobsite-setup screen - (2) Manage Jobsites: Select Action tab

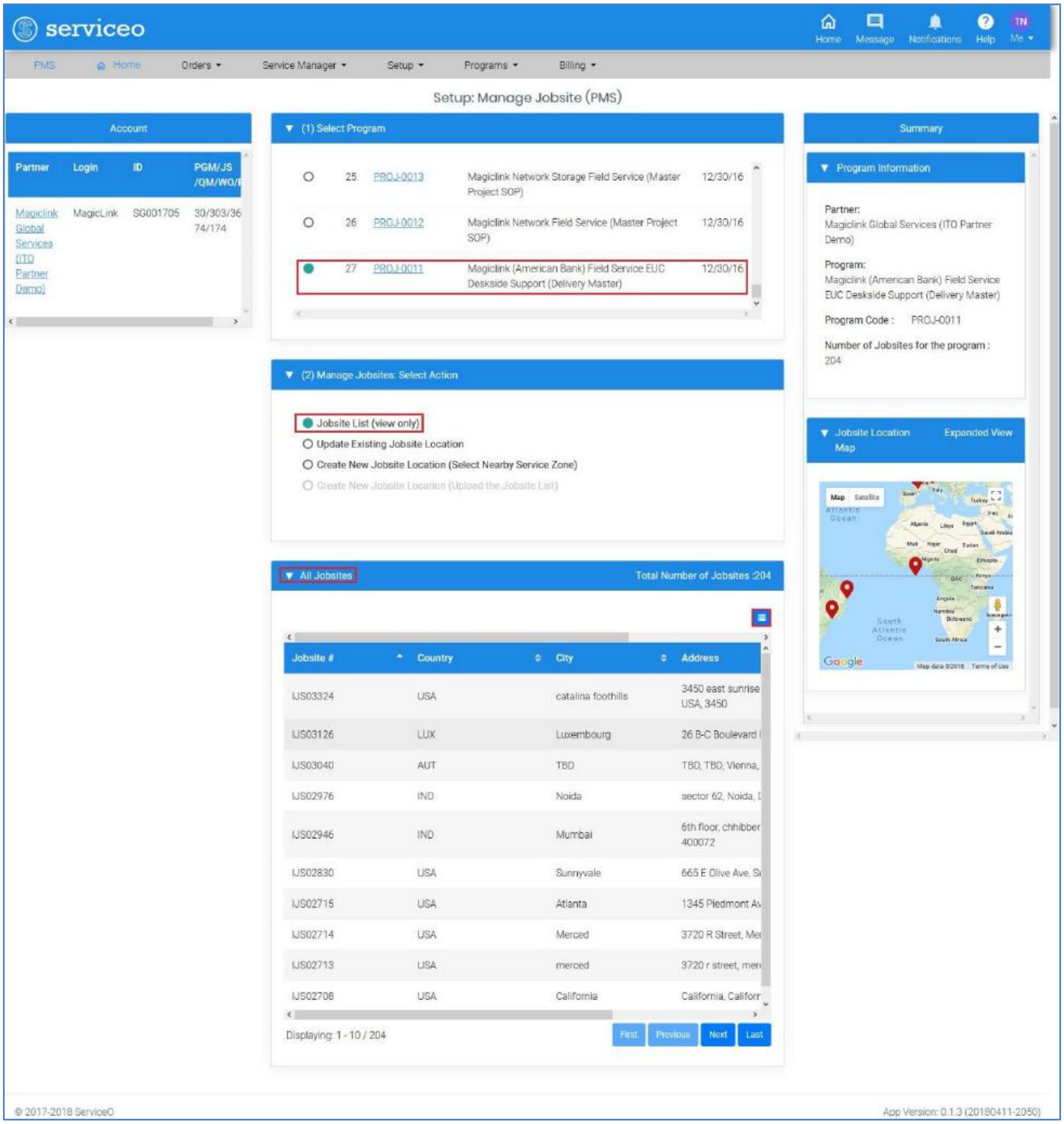
   Tip: As you select the Program in the ***(1) Select Program*** tab, the program details, including **Program**, **Program Code**, and **Number of Jobsites for the program**, get updated in the *Program Information* tab in the **Summary** section.

   The **Jobsite Location Map** also gets changed with the selection of **Program** in the *(1) Select Program* tab.

2. Select the **Jobsite List (view only)** in the *(2) Manage Jobsites: Select Action* tab. Refer Figure 6.2.

   The *Jobsite-setup* screen updates with a list of all Jobsites which are linked with the selected program as shown in Figure 6.3.

Figure 6.3: Jobsite-setup screen - All Jobsites tab



Note: Here, you can view the list of all the jobsites that are linked to the selected program and the detailed information about all the jobsites. The jobsite list includes the following fields:

a) Jobsite Code
b) Country
c) City
d) Address

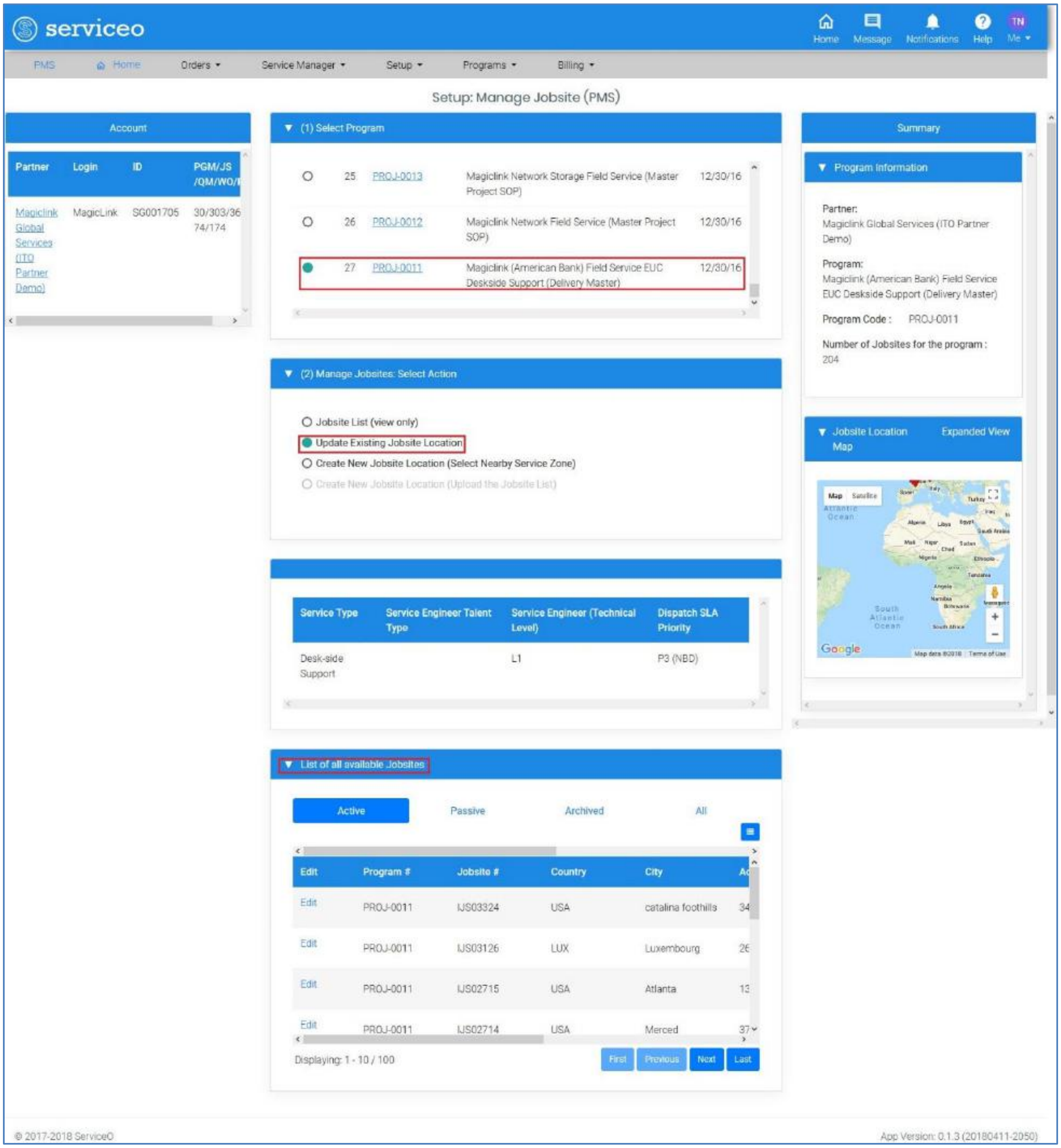
6.1.2 Updating Existing Jobsite Location

Here, users can edit the Contact Information to keep Jobsite detail updated. You can also manage the status of the Jobsite location by assigning Active/Passive/Archived status.

To update or edit existing Jobsite Location details, perform the following steps:

1. Select the program in the *(1) Select Program* tab whose jobsite location you want to update. Refer Figure 6.3.
2. Select the **Update Existing Jobsite Location** option in the *(2) Manage Jobsites: Select Action* tab. The *Jobsite-setup* screen updates with the **Default Profile** and **List of all available Jobsites** tabs as shown in Figure 6.4.

Figure 6.4: Jobsite-setup screen – List of Available Jobsites tab



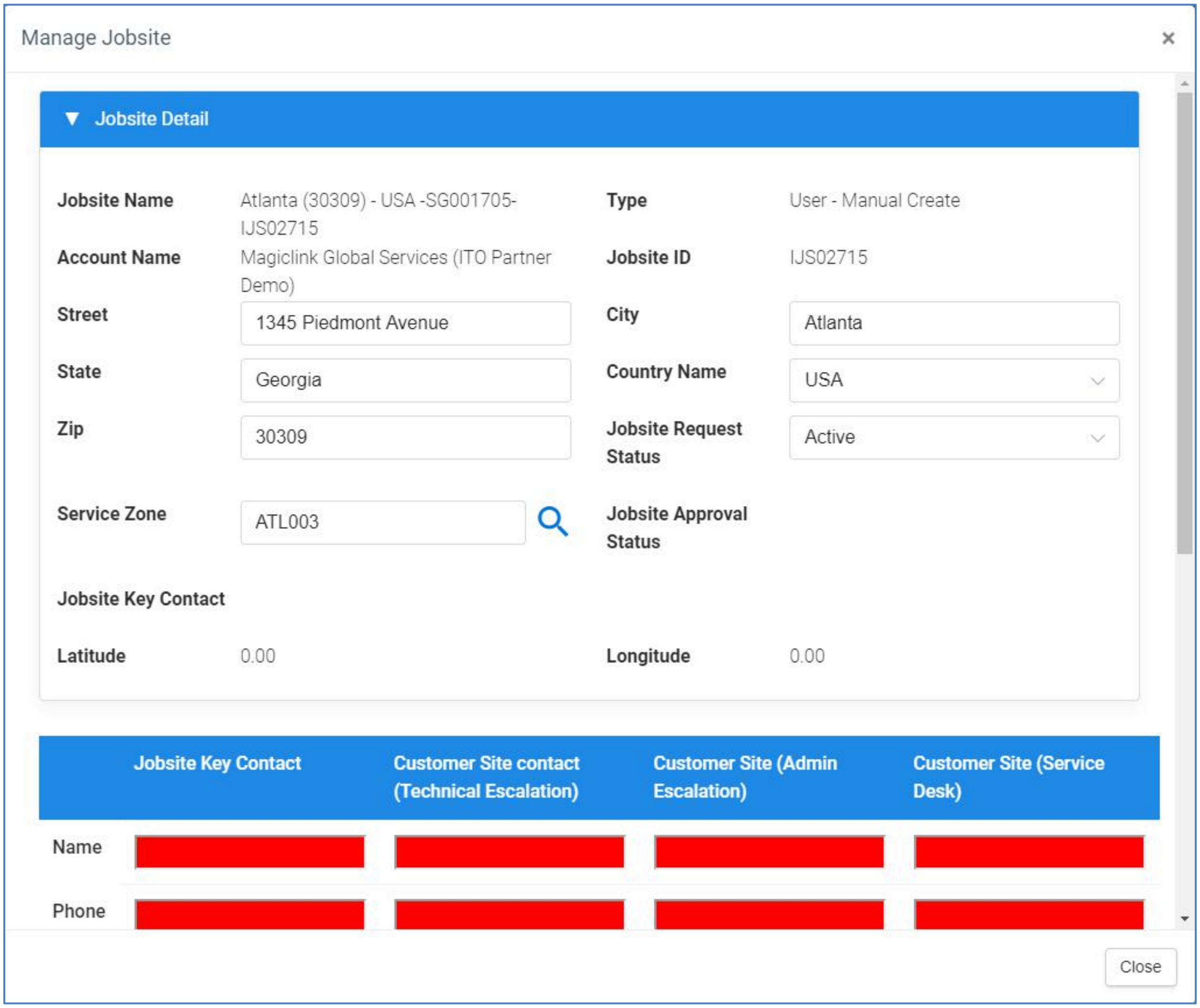
Tip: The **List of all available Jobsites** tab is composed of four tabs:

- The ***Active*** tab holds all available jobsites that are in Active state.
- The ***Passive*** tab holds all available jobsites that are in Passive state.
- The **Archived** tab contains all those jobsites that are less frequently used.
- The ***All*** tab displays all available jobsites irrespective of their states.

3. Click the **Edit** link of the Jobsite to update jobsite location details.

   It will take you to the *Manage Jobsite* pop-up to make changes as shown in Figure 6.5.

Figure 6.5: Manage Jobsite pop-up



4. Make the relevant changes in the contact fields you want to make and then click **Save** button to update the changes.

   Tip: Click the **Close** button to discard the changes.

   Note: Fields in red color are mandatory.

6.1.3 Creating New Jobsite Location by Selecting Nearby Service Zone

You can add a new Jobsite to Program location list using two simple steps:

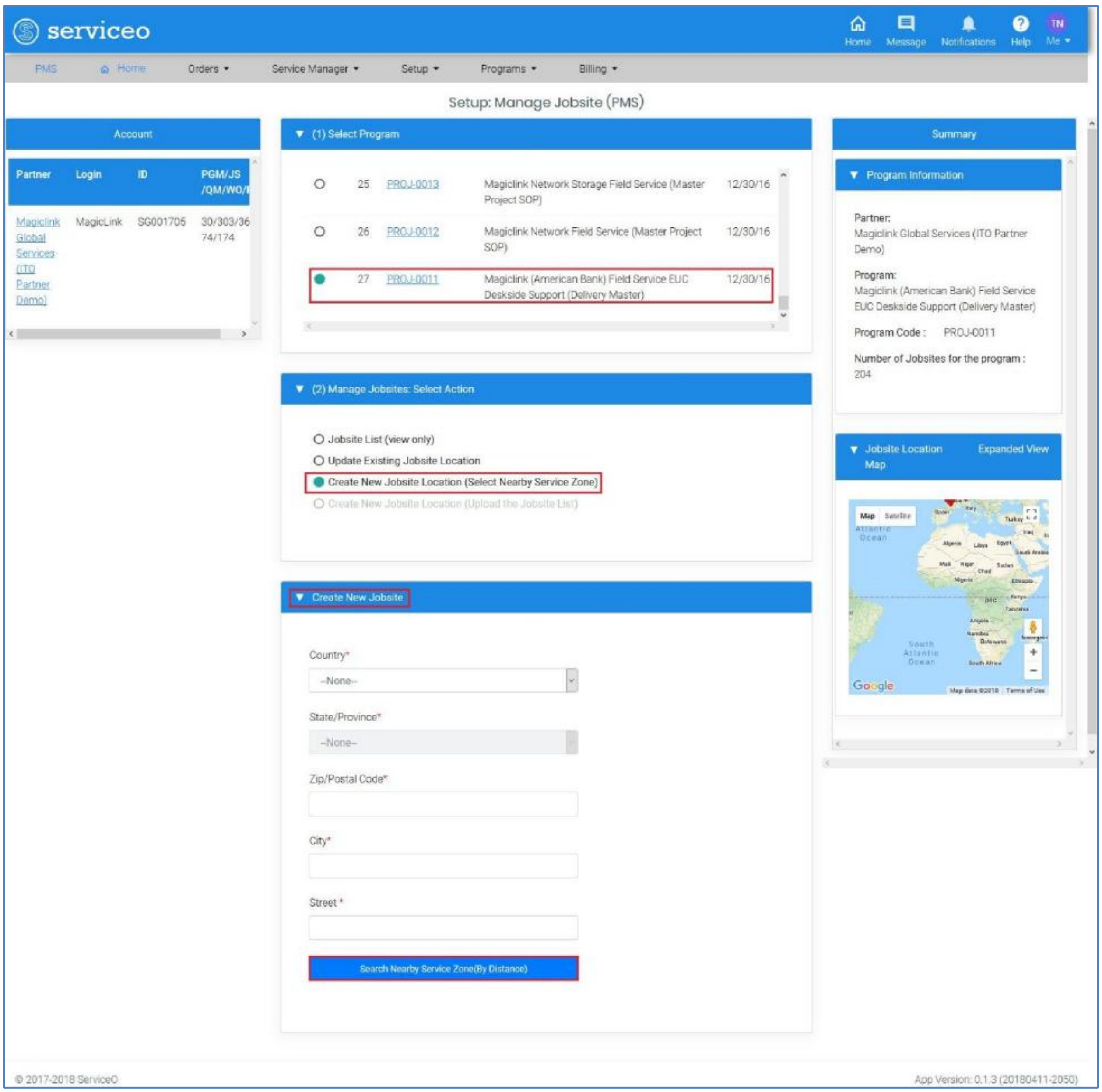
- Enter Address and Search for Nearby Service Zone
- Select a preferred Nearby Service Zone to Create a New Jobsite

To add a new jobsite location, perform the following steps:

1. Select the program in the **(1) Select Program** tab to which you want to add new jobsite location by selecting nearby available service zone. Refer Figure 6.2.
2. Select the **Create New Jobsite Location (Select Nearby Service Zone)** option in the *(2) Manage Jobsites: Select Action* tab.

   The *Jobsite-setup* screen updates with the *Create New Jobsite* tab as displayed in Figure 6.6.

Figure 6.6: Jobsite-setup screen - Create New Jobsite

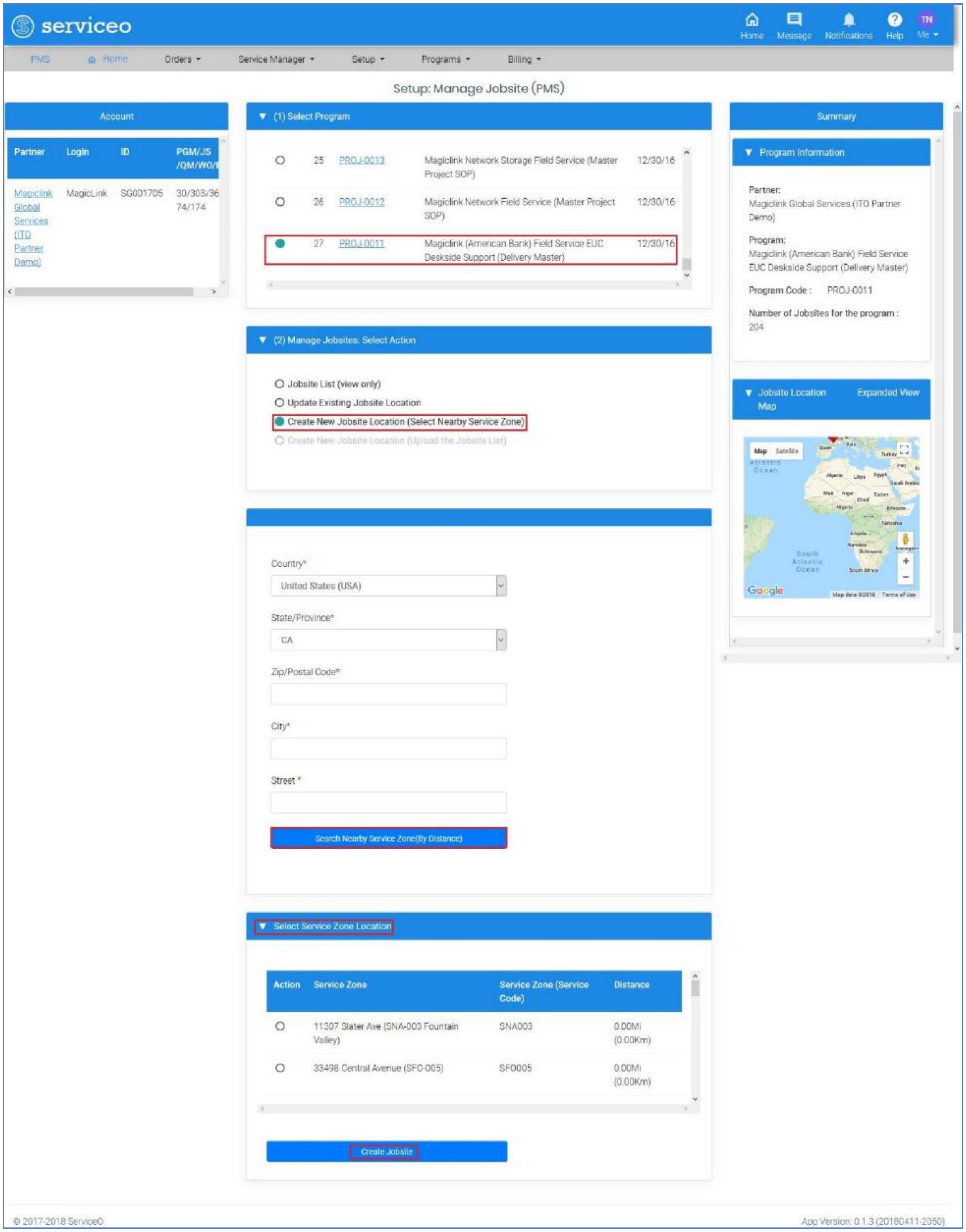


Note: Fields marked with asterisk are mandatory.

3. Select the country name in the **Country** drop-down list.
4. Select the state or province in the **State/Province** drop-down list.
5. Type the postal code of the area in the **Zip/Postal Code** field.
6. Type the name of city in the **City** field.
7. Type the street name in the **Street** field.
8. Click the **Search Nearby Service Zone (By Distance)** button to search the nearest location.

   The *Jobsite-setup* screen updates with the **Select Service Zone Location** tab is displayed at the bottom of the screen as displayed in Figure 6.7.

Figure 6.7: Jobsite-setup screen – Service Zone Location



9. Select the location in the **Select Service Zone Location** tab and then click the **Create Jobsite** button to create new jobsite location for the program.
   Note: A newly created jobsite will be added to the list of program jobsites, the status will be marked as “Activation Pending”. However, the jobsite will be visible in Create Case Jobsite list.

6.1.4 Creating New Jobsite Location by Uploading the Jobsite List

-------This option is not available-----

6.2 User Management (PMS)

-------Currently this option is not available----- will be updated in next version.

7 Programs

The Programs is the place where you will be able to access the detailed view of all listed programs associated with an Account. Here you can also view approved project vendors and project workers.

It primarily provides access to the all listed Service Catalogue (Price List) that have already been brought/stored in the Serviceo.

This module is not designed to enter any records but to only view the records which have been stored in the System.

Here, you can also locate all service providers, which are listed with the Iron Systems.

The **Programs** module comprises three sub-modules, namely **Programs**, **Service Catalog (Price List)**, and **Service Locator (PMS)**.

7.1 Programs

The Programs interface lists the details of Programs, Project Vendors, and Project Workers.

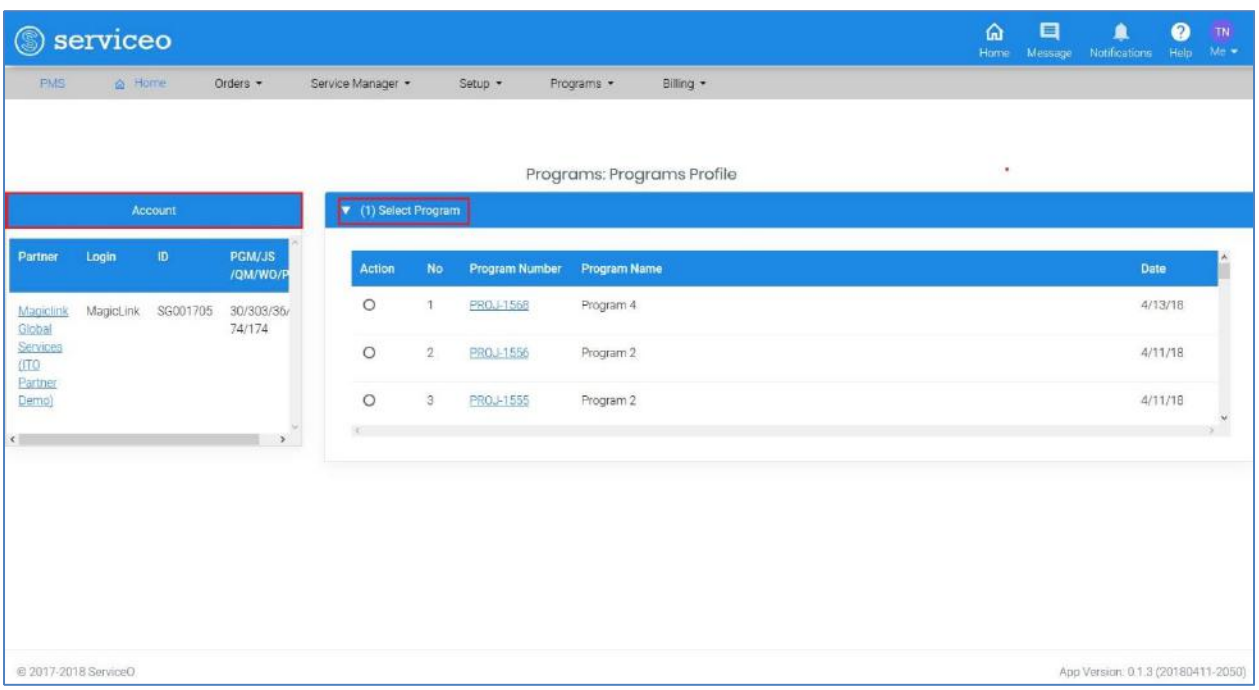
To access the Program Profile, perform the following steps:

1. Click the **Programs** located next to the **PMS** *Home* icon and then click **Programs Profile** to access the Program Profile.

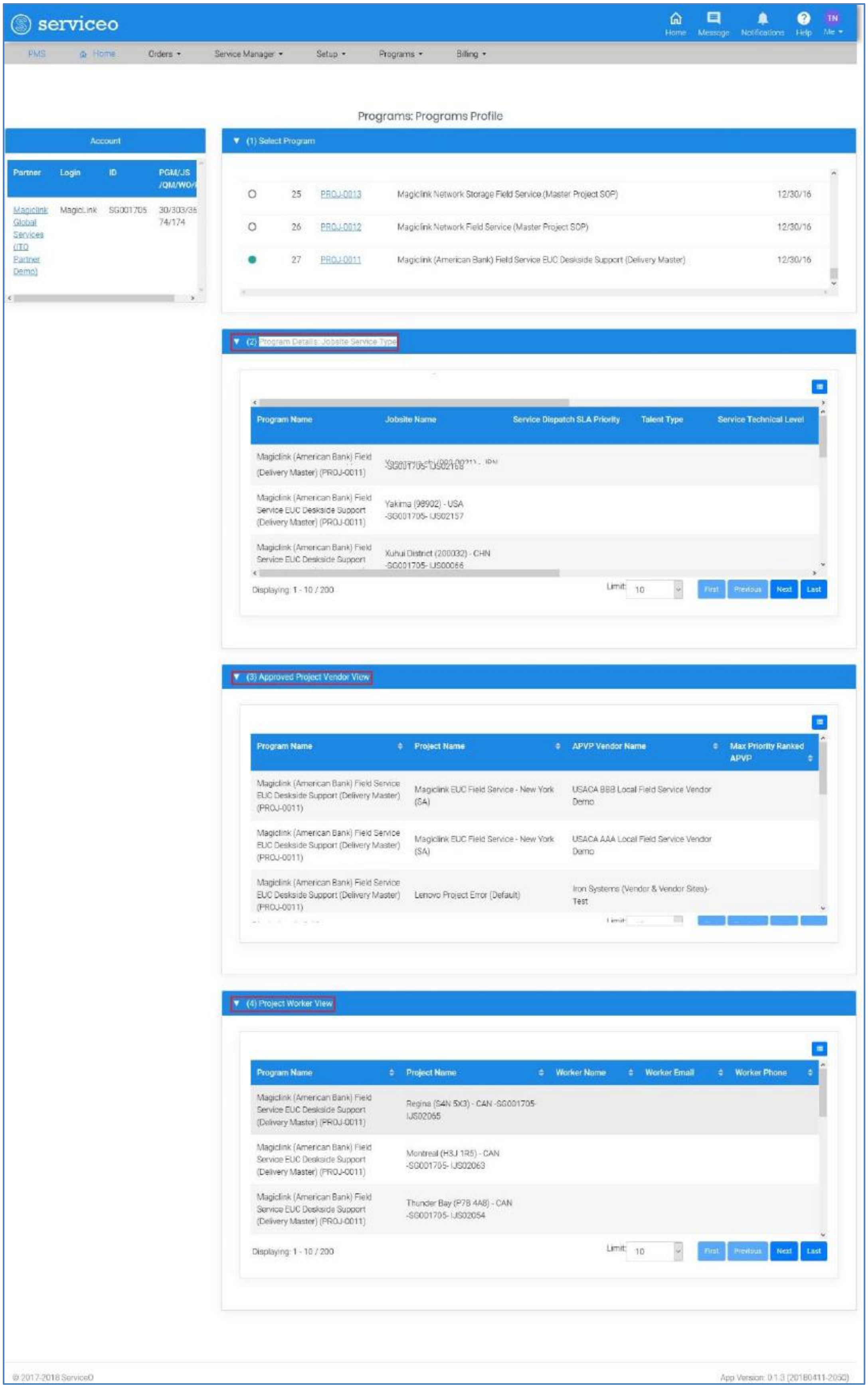
   Click Programs → Programs Profile:

   The *Programs Profile* screen displays as shown in Figure 7.1.

Figure 7.1: Programs Profile screen



2. Select the Program number in the ***(1) Select Program*** tab to view detailed program profile. The *Programs Profile* screen updates with tabs, ***(2) Program Details: Jobsite Service Type***, ***(3) Approved Project Vendor View***, and ***(4) Project Worker View*** for corresponding "**Program**" as shown in the below figure:


serviceo
Home
Message
Notifications
Help
Me
PMS
Home
Orders
Service Manager
Setup
Programs
Billing
Programs: Programs Profile
Account
Partner
Login
ID
Magiclink Global Services (ITO Partner Demo)
MagicLink
SG001705
(1) Select Program
25 PROJ-0013 Magiclink Network Storage Field Service (Master Project SOP) 12/30/16
26 PROJ-0012 Magiclink Network Field Service (Master Project SOP) 12/30/16
27 PROJ-0011 Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) 12/30/16
(2) Program Details: Jobsite Service Type
Program Name
Jobsite Name
Service Dispatch SLA Priority
Talent Type
Service Technical Level
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)
Yakima (98902) - USA -SG001705- IJS02157
Xuhui District (200032) - CHN -SG001705- IJS00066
Displaying: 1 - 10 / 200
Limit: 10
First
Previous
Next
Last
(3) Approved Project Vendor View
Program Name
Project Name
APVP Vendor Name
Max Priority Ranked APVP
Magiclink EUC Field Service - New York (SA)
USACA BBB Local Field Service Vendor Demo
USACA AAA Local Field Service Vendor Demo
Lenovo Project Error (Default)
Iron Systems (Vendor & Vendor Sites)-Test
(4) Project Worker View
Program Name
Project Name
Worker Name
Worker Email
Worker Phone
Regina (S4N 5X3) - CAN -SG001705- IJS02065
Montreal (H3J 1R5) - CAN -SG001705- IJS02063
Thunder Bay (P7B 4A8) - CAN -SG001705- IJS02054
Displaying: 1 - 10 / 200
© 2017-2018 ServiceO
App Version: 0.1.3 (20180411-2050)

Tip: Click the icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

Select the number you want to view in the **Limit** drop-down list.

Click the **First** button.to view records displayed on the first page, **Previous** button to view previous records, **Next** button to move to the next page, and the **Last** button to go to the last page.

7.2 Service Catalogue (Price List) (PMS)

This module allows you to view service catalogue and search the most complex service catalogue (price list) with ease. Here, you will be able to search the price list of services by applying different search criteria.

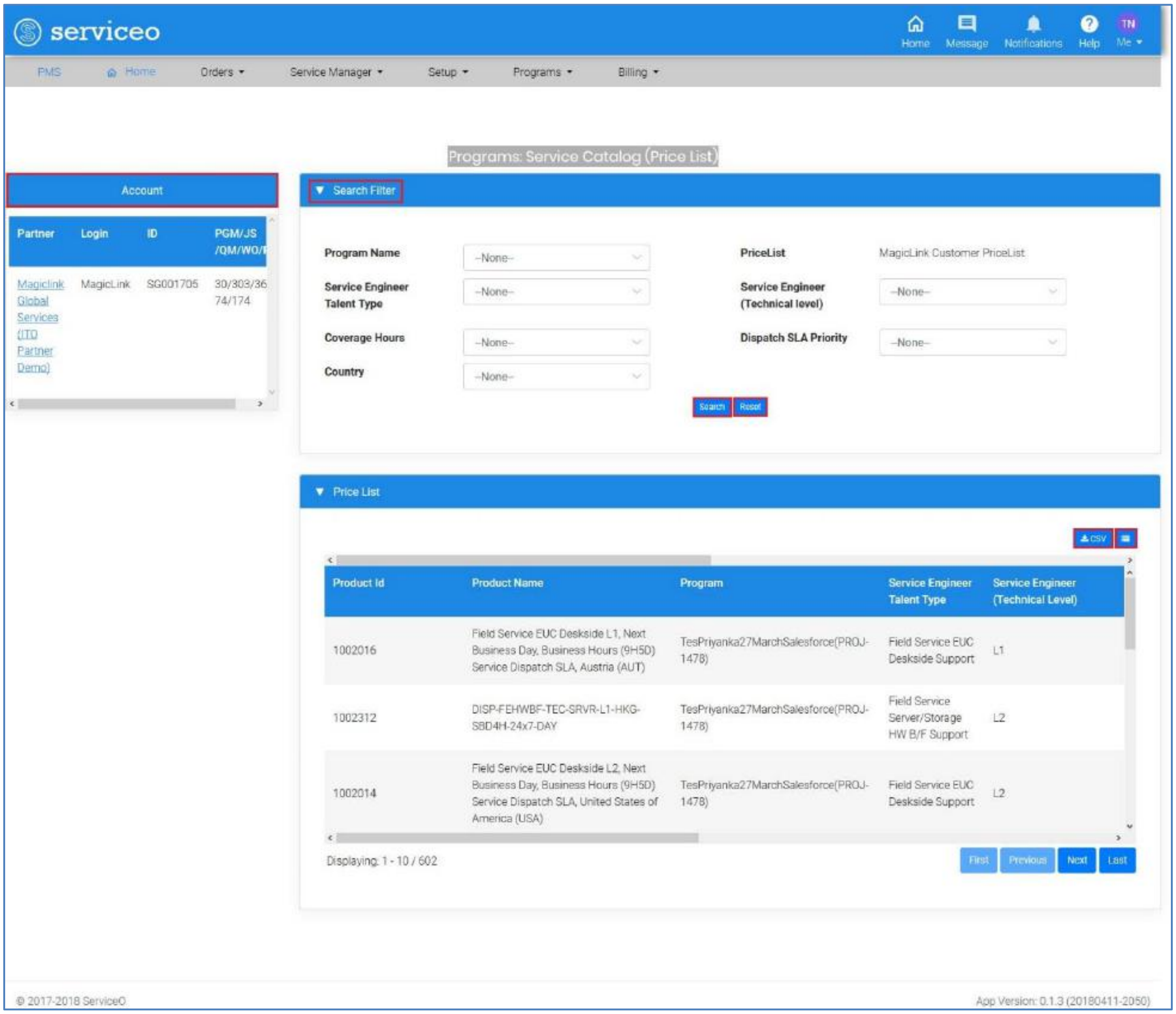
To view and search the Service Catalogue (Price List), perform the following steps:

1. Click the **Programs** located next to the **PMS** *Home* icon and then click **Service Catalogue (Price List) (PMS)** option to access pricelist screen.

   Click Program → Service Catalogue (Price List) (PMS):

   The *Programs: Service Catalog (Price List)* screen appears as shown in Figure 7.2.

Figure 7.2: Programs: Service Catalog (Price List) screen



Tip: Click the  button to download the Price List in the **Excel** format. Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

Click the **First** button.to view records displayed on the first page, **Previous** button to view previous records, **Next** button to move to the next page, and the **Last** button to go to the last page.

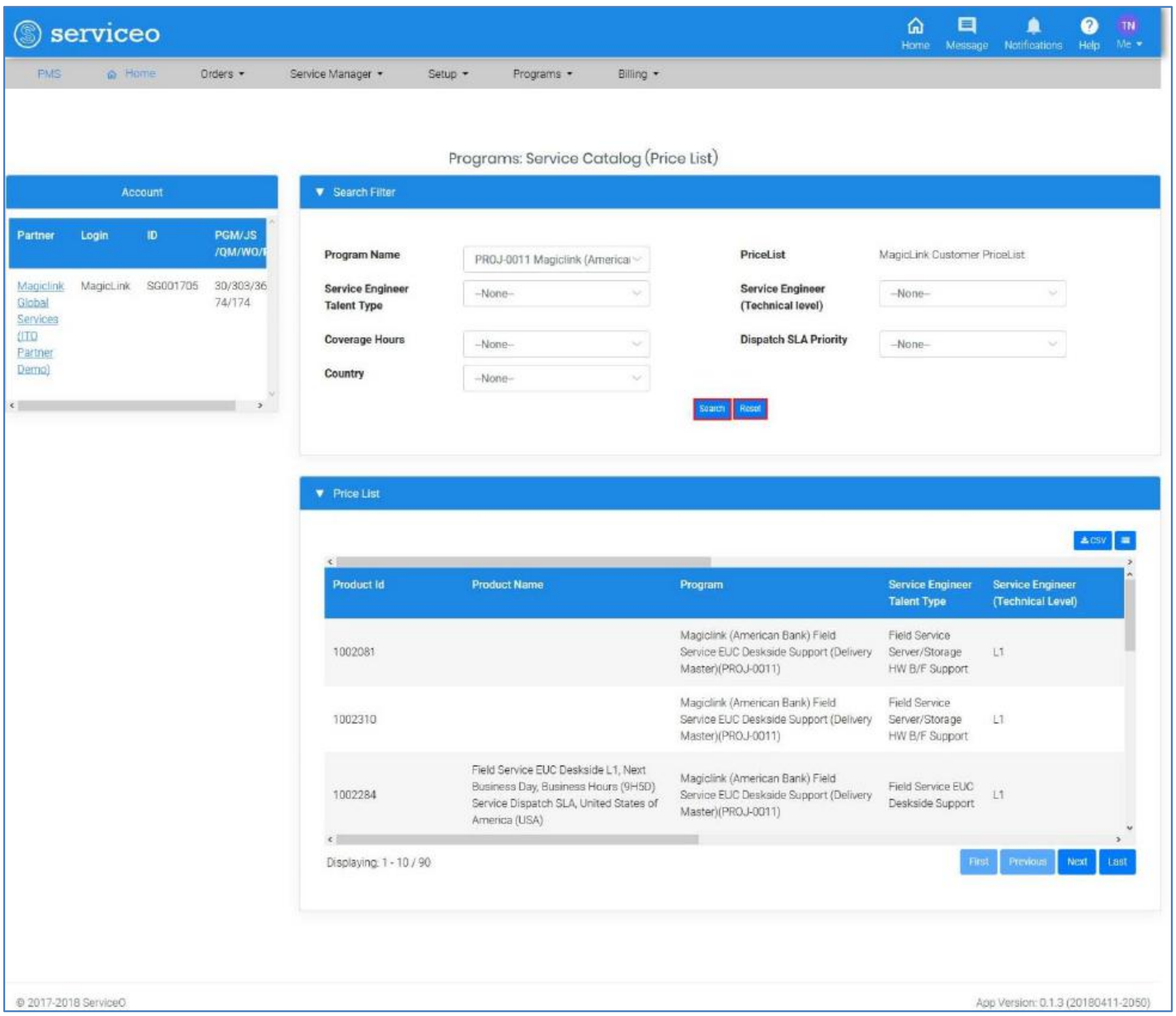
2. Select the program name for which you want to search price list in the **Program Name** drop-down list in the ***Search Filter*** tab.

   Note: As you select the Program Name in the Program Name drop-down select list, the **PriceList** field gets updated.

3. Select the service engineer talent type in the **Service Engineer Talent Type** drop-down list.
4. Select the technical level of selected service engineer in the **Service Engineer (Technical level)** drop-down select list.
5. Select the coverage hours in the **Coverage Hours** drop-down list.
6. Select the SLA priority in the **Dispatch SLA Priority** drop-down list.
7. Select the country in the **Country** drop-down select list.
8. Click the **Search** button to fetch the records based on selected search criteria.

   The ***Price List*** tab on the *Programs: Service Catalog (Price List)* screen updates with records as shown in Figure 7.3.

Figure 7.3: Pricelist screen – Price List tab



Tip: Click the **Reset** button in the *Search Filter* tab to reset the search criteria.

7.3 Iron Global Service Locator (PMS)

This module allows you to easily search, identify and connect all available active 3PS and 3PL service providers in any region. You will also be able to detect service providers' location, identify service providers in the vicinity with markers on the map.

Iron Service Global serves various locations globally.

There are two types of service provider available in the serviceo.

- 3PS –
- 3PL –

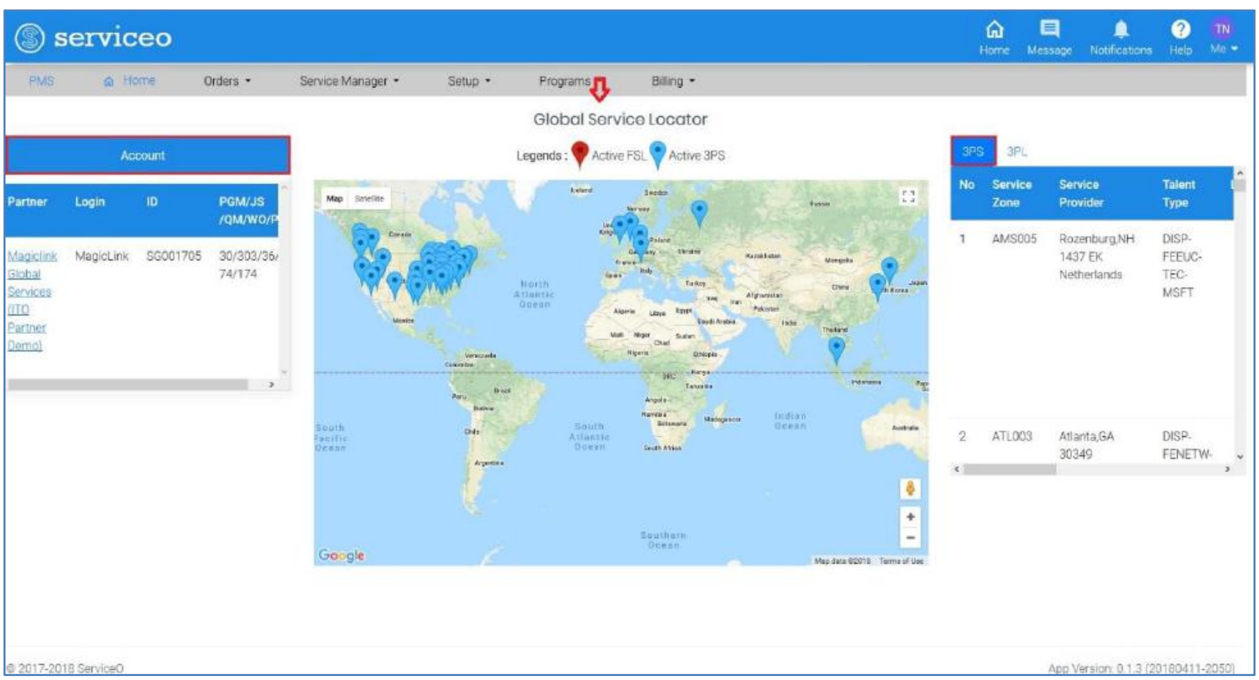
To locate global service providers, perform the following steps:

1. Click the **Programs** located next to the **PMS** *Home* icon and then click **IRON Global Service Locator (PMS)** option to Coverage-map screen.

   Click Programs → IRON Global Service Locator (PMS):

   The *Coverage-map* screen appears as shown in Figure 7.4.

Figure 7.4: Coverage-map screen



Note: The *Coverage-map* screen displays **Account** section in the left side and ***3PS*** and ***3PL*** tabs in the right side of the screen. The ***3PS*** tab displays by default. Refer Figure 7.4.

The **Account** section displays a list of partners including their login, ID and other details.

Placing the pointer over the icon on the map displays the location code and complete address of the service providers.

8 Billing

The Billing module contains billing related information entered by authorized users.

The Billing Dashboard allows you to view and analyze the cumulative data of detailed invoice. It also displays Sales invoice in graphics on a single screen. It pulls relevant information in real time that helps staff to view key information.

This capability allows you to make quick and the spot decision.

The Billing Dashboard also allows to select column name for which you want view data on the dashboard.

8.1 PMS Billing (Invoice) Dashboard

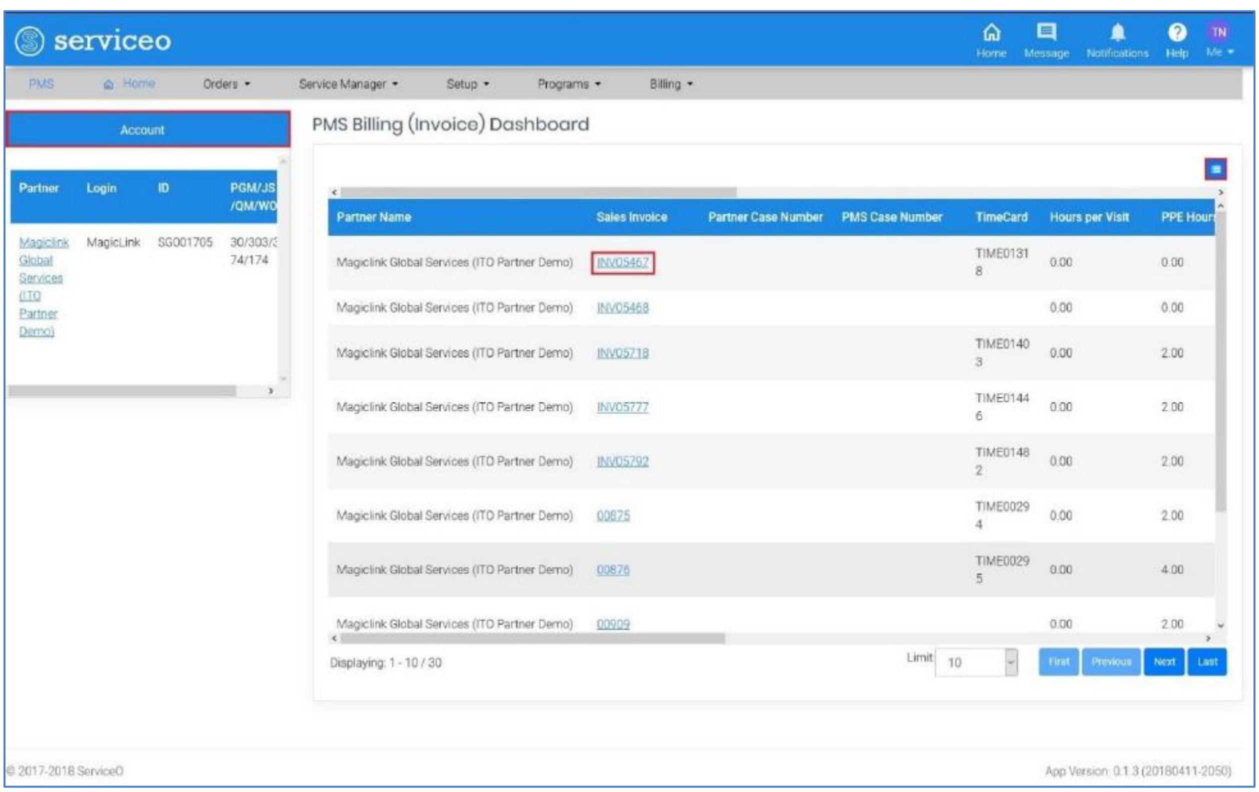
To access PMS Billing (Invoice) Dashboard, perform the following steps:

1. Click the **Billing** located next to the **PMS** *Home* icon and then click the **PMS Billing (Invoice) Dashboard**.

   Click Billing → PMS Billing (Invoice) Dashboard:

   The *Billing-manager* screen appears as shown in Figure 8.1.

Figure 8.1: Billing-manager screen

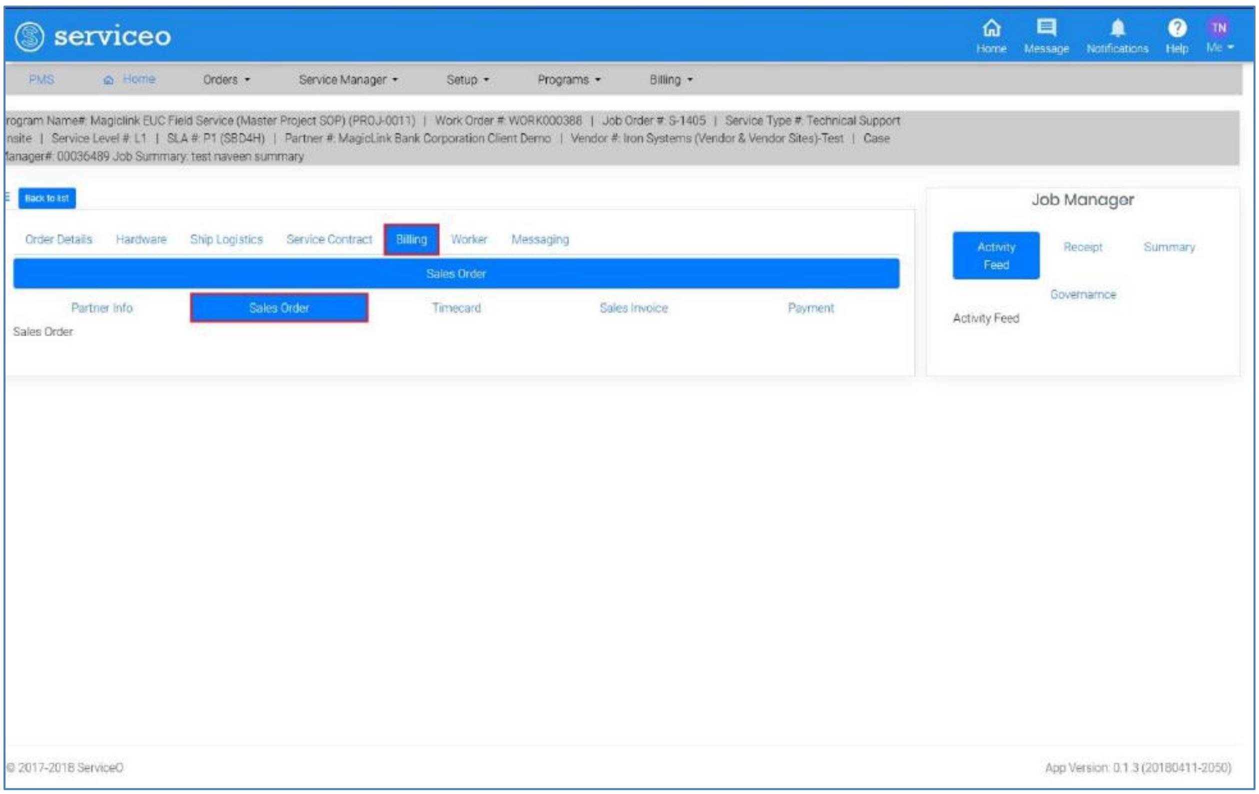


Tip: Click the **Partner** name link in the ***Account*** section to view the account details. Click the  icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

2. Click the ***Sales Invoice*** link next to the **Partner Name** to view invoice details in graphics.

   It will take you to the *Billing details* screen as shown in Figure 8.2.

Figure 8.2: Billing Details screen



Tip: The *Billing* tab displays five tabs, namely *Partner Info*, *Sales Order*, *Timecard*, *Sales Invoice* and *Payment* tabs. The *Sales Order* tab displays by default.

9 File Manager

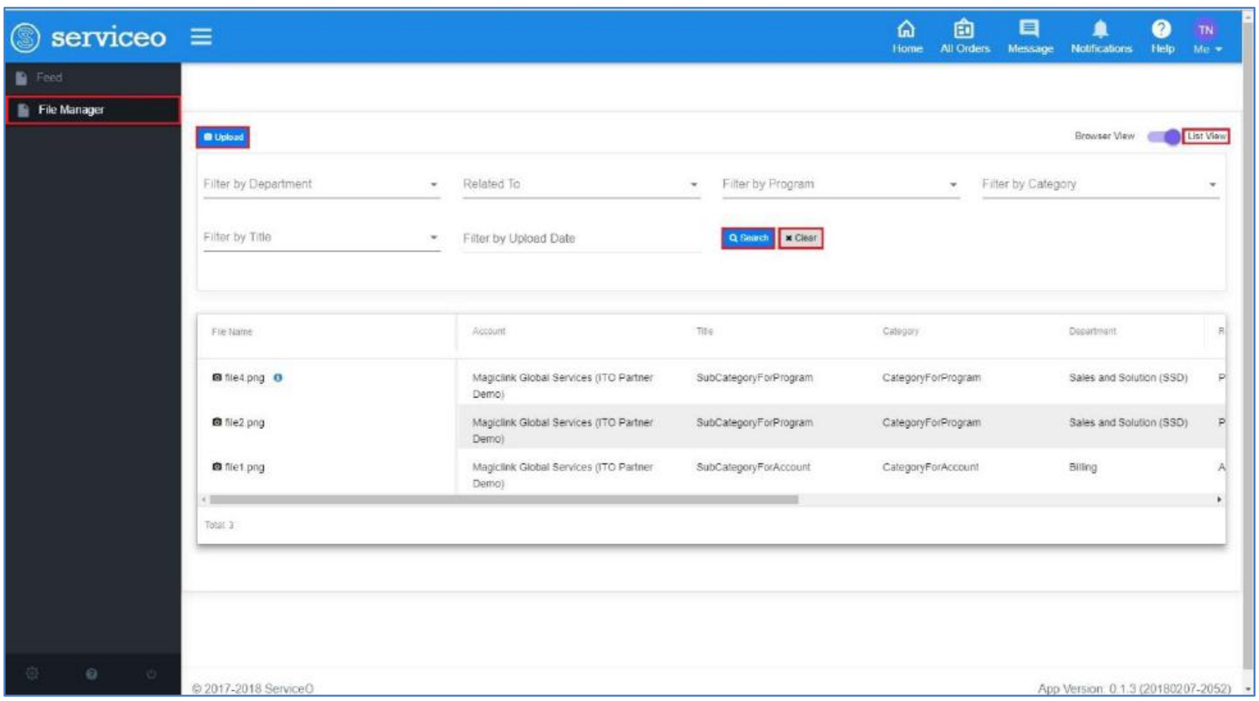
The File Manager module enables you to manage files which are uploaded in support of different departments.

To upload file, perform the following steps:

1. Click the **Setup** located next to the **PMS** *Home* icon and then click the **Jobsite Location (PMS)** option at the top of the *home* page.

   The *File-manager* screen is displayed as shown in Figure 9.1.

Figure 9.1: File-manager screen



10 Table of Figures

It presents the list of figures and their page numbers used in this document for quick reference.