

## Course Outline:

### Project and Field Management

This webinar was created to provide an introduction to project management and field management with 30-40 minutes of feature description and demonstration followed by a Q&A period.

#### Session Topics

- Project Management Overview
- Data Related to Project Management
- Purchase Order Requests/Tracking
- Tasks
- Mobile Install
- Service Orders

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## Project Management Overview

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- How can D-Tools help manage projects once sold?
- Track overall project status (Project Statuses)
- Issue Purchase Order Requests
- Issue Purchase Orders – By Vendor (not covered)
- Track and receive orders with purchasing tools (not covered)
- Track product/material acquisition for my projects
- Scheduling
  - Tasks (Contract project work)
  - Service Orders
    - Service existing projects
    - Service new customers
- Installation tracking from the project
- Mobile Install – Web app for managing tasking and resources
- Resource Hours – How and where is my team being utilized? (not covered)

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## Data Related to Project Management

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- **Project Assigned/Resource Assignments**
- **Project Status (Milestones)**
- **Purchase Status Info**
- **Installation**
  - **Serial Number**
  - **IP Address**
  - **MAC Address**
  - **Install Status**
  - **Install Date**
  - **Install Notes**

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## Purchase Order Requests/Tracking

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- A Purchase Order Request (POR) is just a report we run from a project
- We can filter products in different ways:
  - Order Status
  - Phase
  - Location
  - Vendor/Manufacturer
- Using these filters helps us to decide what items to request on the POR
- PORs are not tracked in the software
  - A custom field could be used for this purpose

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## **ACTIVITY 1**

### **Filter Items before running a POR report**

1. From a project, on the Home tab, select Quick Filter. Near the bottom of the window is the Orders icon. Select it and you can filter on orders for the project.
2. If no orders exist, move on to filter by Phase (6<sup>th</sup> icon from the top). Choose a phase and the view will be filtered to your selection.

Note: Try other options like Manufacturer or Vendor. More than one filter can be applied at the same time.

## **ACTIVITY 2**

### **Run a POR report on filtered Items**

1. Click on the Reports tab.
2. In the Include Options section, select Filtered Items.
3. In the Reports section select Management.
4. When the Management Reports window opens, double-click on Purchase Order Request.
5. The report will run and open.
6. You can export to PDF or Email a copy directly to your purchasing agent.

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# Notes

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## Scheduling - Tasks

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- **Tasks allow you to schedule work to be completed for a project**
- **Tasks include products with associated labor**
- **The sum of the labor associated with these tasks creates a time budget**
- **One or more resources may be assigned to a task**
- **A task is scheduled on the calendar**
- **The total number of hours and the number of resources assigned can be used to determine a duration for the task**
- **Tasks can be issued as reports, sent via email, or published to Mobile Install**

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### ACTIVITY 3

#### Create and Schedule a Task

1. Click Start → Schedule → Manage Tasks. The Task Explorer opens.
2. On the Home tab, click New. The Select Project window opens.
3. Select your Client and then your Project. Click Select. The New Task window opens.
4. Every Task needs a name. Type something like '[Your Initials] – Rough-in' or another descriptive name that will look unique in the list of Tasks.
5. Type a description in the Description field. Keep it short.
6. On the Navigate section at the top of the window, click Items.
7. Click Add Products. The Add Products window opens.
8. Consider using Quick Filters to select a specific phase, location, or another filter. Then select items from the list. Click Add and Close. The items will be added to the Task.
9. Next click the Resources button. Click Assign. The Assign Resources window opens.
10. Choose a Resource from the list and click Assign. Notice the Estimated Hours for the Resource is set to 1.000. This is a default value.
11. On the bottom-left of the window select Assign estimated hours based on total labor hours. Click Yes when prompted. The Estimated Hours should be updated.
12. Click General, then click on the Start Date. Pick a date on the calendar.
13. Next click Compute End. The Compute End Date dialog box will open.
14. Select the Estimated Resource Hours radio button. Click OK.
15. Click Save and Close. Choose No when prompted to publish the task to Mobile Install. This task will be completed later. (Continued on next page.)

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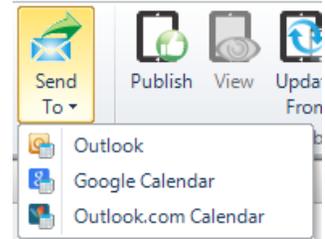
**16.** Now your Task is created and scheduled but the Resource has not been notified.

**Note:** Sometimes it is best to wait to send out Tasks in case the schedule moves around.

Select your Task from the list in the Task Explorer. Click Reports. Then under Standard Reports, double-click Task Detail. This is your Task. You can save the report as a PDF and email to the Resource.

**17.** If you use Outlook, Outlook.com or Google Calendar, you can click Send To and then pick one of those choices. Follow the prompts to send your Task.

**Note:** While a PDF Task Detail report will be added when working with Outlook, no report will be attached for Google or Outlook.com calendars.



**18.** Back in the Task Explorer, click Calendar. This will open the Calendar view and allow you to view Tasks on a traditional calendar.

**Note:** The Merge Calendar option makes viewing multiple Tasks easier.

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## Mobile Install

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- **Mobile Install is a web app that is linked to Tasks and Service Orders**
- **Field resources can interact with Tasks and Service Orders through the Mobile Install interface**
- **Mobile Install allows installers to update the status of Tasks and Service Orders, providing near real time feedback to SI**
- **Mobile Install offers a calendar view, a task list view, and shows all details of Tasks and Service Orders**
- **It is compatible with any web-enabled device and runs in the web browser**

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## Scheduling – Service Orders

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- **Service Orders work almost identically to Tasks**
- **Tasks require a project, service orders do not**
- **Service Orders only require a Client**
- **Products and Labor can be added directly from the Catalog**
- **Site Labor Settings can define a labor rate to add labor in the field**

### ACTIVITY 4

#### Create and Schedule a Service Order

Creating a Service Order is like creating a Task. Instead of choosing a project, you only need a Client. However, if you are performing service on an existing SI project, pick the project as well.

2. Click Start → Schedule → Manage Service Orders. The Service Order Explorer opens.
3. On the Home tab, click New. The New Service Order window opens.
4. Select your Client (and then your Project.)
5. Provide a name. Type something like '[Your Initials] – Troubleshoot TV' or another descriptive name that will look unique in the list of Service Orders.
6. Type a description in the Description field. Keep it short.
7. On the Navigate section at the top of the window, click Labor.
8. Click Add. The Add Labor window opens. (Continued on next page.)

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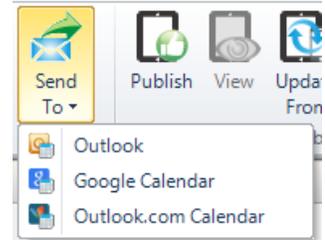
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9. Scroll down and select Standard Service Call in the list. Click Add and Close. The labor item will be added to the Service Order.
10. Next click the Resources button. Click Assign. The Assign Resources window opens.
11. Choose a Resource from the list and click Assign. Notice the Estimated Hours for the Resource is set to 1.000. This is a default value.
12. In this case, you may want to simply type in a number of hours based on your estimate of the time needed to work through the Service Order.
13. Click General, then click on the Start Date. Pick a date on the calendar.
14. Next click Compute End. The Compute End Date dialog box will open.
15. Select the Estimated Resource Hours radio button. Click OK.
16. Click Save and Close. Choose No when prompted to publish the task to Mobile Install.
17. Now your Service Order is scheduled but the Resource has not been notified. Select your Service Order from the list in the Service Order Explorer. Click Reports. Then under Standard Reports, double-click Service Order Detail. This is your Service Order. You can save the report as a PDF and email to the Resource.

18. If you use Outlook, Outlook.com or Google Calendar, you can click Send To and then pick one of those choices. Follow the prompts to send your Service Order.

**Note:** While a PDF Service Order Detail report will be added when working with Outlook, no report will be attached for Google or Outlook.com calendars.



19. Back in the Service Order Explorer, click Calendar. This will open the Calendar view and allow you to view Service Orders on a traditional calendar.

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## Notes

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## Training content complete

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- Questions?
  
- Support Resources Available
  - D-Tools Application Home Page Links
    - [Documentation](#) – open the Support Wiki
    - [Support Ticket](#) – open the web page to create a support ticket
    - [Chat With Us](#) – Launches Chat Support
  - From any D-Tools software interface, click Learn More
    - Found in the upper-right corner
    - Launches the Support Wiki
  - Open the Support Wiki directly at [support.d-tools.com](http://support.d-tools.com)
  - Send an email to [support@d-toolshelp.com](mailto:support@d-toolshelp.com)
  - Call 866.386.6571

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