Managing Technicians in DOLI

Revised: 22 May 2013

The most current version of this document can be found under "Manuals" on the DOLI home page.

Table of Contents

THE IMPORTANCE OF MAINTAINING TECHNICIAN INFORMATION WITH INSTALLS

Background Checks

Installs performs background checks on every technician and helper an installer wants to use for Installs work. Background checks are required to ensure the safety of our customers and their investments, and to protect the assets and reputations of the Installs network and our clients.

Installs uses a third-party company to screen all potential technicians during the installer onboarding process. Installers **must** notify Installs Field Relations team when they wish to assign a new technician to Installs jobs so we can run a background check on the new tech. The required background checks run by Installs include criminal and driving record checks.

Installs does not allow installers to use technicians who have failed an Installs background check, or technicians who have not been background checked by Installs. Such individuals can pose high-risk threats to Installs' business, our clients' reputations, our customers' safety and property, and your company's credibility.

Keeping Technician Information Current in DOLI

Installs' DOLI system is the tool that houses all job information and routes work to technicians. Once your technicians pass their Installs background check, you must set up a technician profile for each one in DOLI. Installs will not be able to assign work to your technicians until you enter them into the system; the DOLI system does not know that your technicians exist until you set up their profiles. The "Creating a Technician User Account in DOLI" section of this document walks you through every step you must take to enter a technician into DOLI. To avoid having work routed inappropriately, do not enter helpers into DOLI (but they must be submitted for and pass an Installs background check).

When there is any change in the information you entered into DOLI about your technicians, you must update the technician's profile in DOLI to ensure that jobs and communications are properly routed to him/her. For example, if your technician moves to a new address/starting ZIP Code and you do not update DOLI, the system will continue to send the technician on jobs that may no longer be within his/her coverage area; this may make his/her daily travel schedule difficult. If a technician earns a new certification or job skill, be sure to update DOLI with this information so that the technician will be eligible for work s/he is qualified to perform. If the technician's phone number or email address changes, update the contact information to ensure that the tech receives notifications regarding jobs.

When technicians leave your company, or when you decide that they will no longer work on Installs jobs, you must update their status in DOLI to reflect that they are no longer active Installs technicians. Until you mark the technician as inactive, DOLI will continue to assign jobs to the technician. To avoid missed appointments, you must change the technician's active status in DOLI as soon as you are aware of it. The "Making a Technician Inactive" section of this document walks you through every step you must take to make a technician inactive in DOLI.

Managing Technician Access to DOLI

Installs creates and manages company-level installer usernames and passwords for DOLI. However, installers are responsible for creating and managing technician usernames and passwords for DOLI. As part of the process of setting up a new technician, you will create a DOLI username and password for each of your technicians. Every technician must have a DOLI login to access and update their assigned jobs.

> **See the "Creating a Technician User Account in DOLI" section of this document for more information.**

If *you* lose or forget your company-level installer username or password, contact Installs Field Relations at 1-888-490-4321 for assistance. If the *technician* loses or forgets his/her DOLI username or password, you may look up the

username in DOLI, but you must create a new password for the technician. Neither the installer nor Installs can see or recover lost passwords.

Your company-level installer username and password allows more DOLI access than technician DOLI login. Your technicians will not see the same DOLI screens detailed in this document and the "DOLI Company Manual;" they will have access to a different set of screens, as outlined in the separate "Technician Guide: Digital Online Interface System (DOLI)" document..

> **!** ***See the "DOLI Technician Manual" on your DOLI homepage for more information.***

> **!** ***See the "DOLI Company Manual" on your DOLI homepage for more information.***

Installer DOLI Login Can:

- View/update job status and notes
- View job scope of work
- Accept orders
- Print work order
- Upload in-home consultation forms
- Download SKU list
- Complete out jobs
- Perform Real-Time Close-outs (RTCO)
- Access training site
- Manage company information
- Manage technicians
- Manage dispatchers
- Reports
- Document store visits
- Decline orders
- Manage escalated orders
- View dispatch board
- Reassign orders to new technicians for same date/appointment window
- Manage non-Installs orders

Technician DOLI Login Can:

- View/update job status and notes
- View job scope of work
- Accept orders
- Print work order
- Upload in-home consultation forms
- Download SKU list
- Complete out jobs
- Perform Real-Time Close-outs (RTCO)
- Access training site

# MANAGING TECHNICIANS IN DOLI

Creating a Technician User Account in DOLI

You must complete this multi-step process to activate your technicians to perform Installs jobs. Your company will not receive any work from Installs until you set up your technicians in DOLI. You should only set up a technician in DOLI after you have received notification from Installs that s/he has passed the Installs background check. **Do not set up DOLI accounts for technicians who have failed, or have not had, an Installs background check.**

Step I: Log in to DOLI

1. Log in to DOLI using the installer username and password provided to you by the Installs Field Relations team.
2. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.

Figure 1
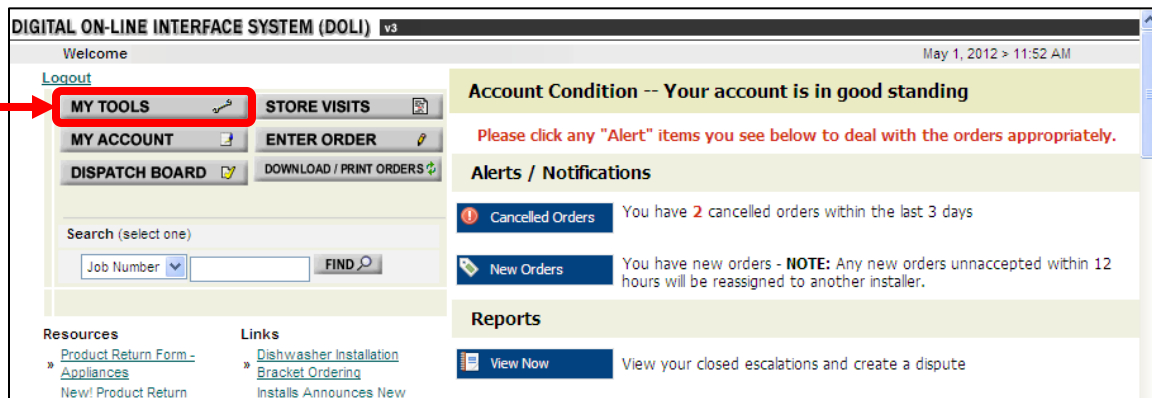
3. On the *My Information* screen, click the **TECHNICIANS** button.

Figure 2
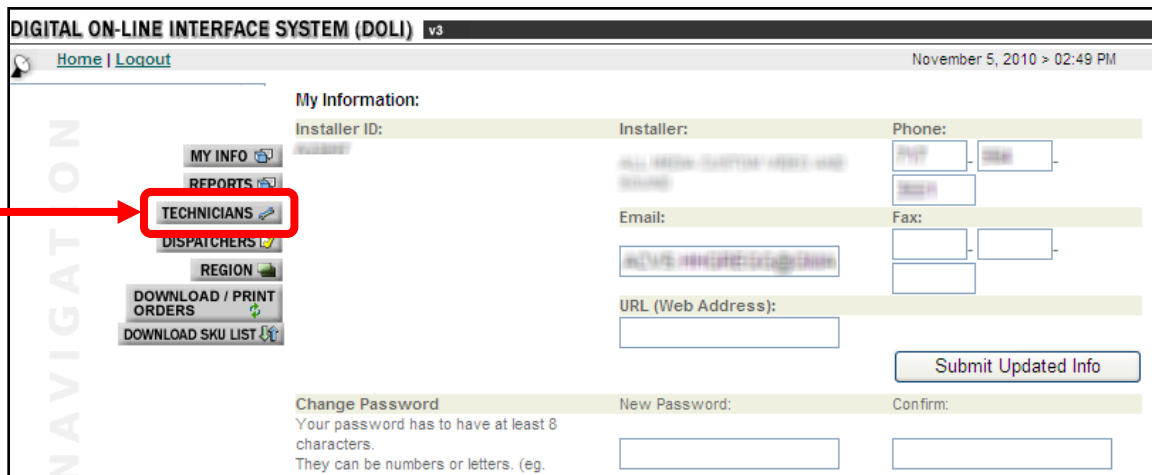
> **Note:** This displays the *Create New Technician* screen. Use the **TECHNICIANS** feature to set up and modify DOLI access for the technicians in your employment.

Figure 3

Step II: Add a technician to your account

4. To add a new technician to your account, complete each field on the *Create New Technician* screen, with the required information:

Figure 4

    a. In the **First Name** field, type the technician's first name (up to 50 characters).

    b. In the **Last Name** field, type the technician's last name (up to 50 characters).

    c. In the **SBCA #** field, enter the technician's SBCA Member Number, if applicable (up to 50 characters).

    d. In the **Phone** field, type the technician's primary work phone number (dashes [-] are allowed in the phone number).

       Note: If you want Installs to directly contact the technician regarding jobs, enter the technician's work phone number. If you prefer that Installs contact you or your office/dispatcher about jobs, enter the phone number you want Installs to use.

    e. In the **Cell** field, type the technician's business cell phone number (dashes [-] are allowed in the cell number).

Note: If you want Installs to directly contact the technician regarding jobs, enter the technician's work cell phone number. If you prefer that Installs contact you or your office/dispatcher about jobs, enter the cell phone number you want Installs to use.

f. In the **Pager** field, type the technician's business pager number (dashes [-] are allowed in the pager number), if applicable.

g. In the **Address** fields, type the technician's address.

- Address (line 1) – up to 50 characters
- Address (line 2) – up to 50 characters
- City – up to 50 characters
- State – select from drop down
- ZIP Code – up to 10 characters

Note: You may enter the technician's home address or the address of your company's central location. The address entered here, specifically the ZIP Code, will help DOLI determine if jobs are within the technician's coverage area. Installs recommends that you use the address/ZIP Code of the technician's daily starting location. For example:

- If the technician comes to your office every day before rolling to jobs, enter the office's address.
- If the technician starts each day at a warehouse, enter the warehouse address.
- If the technician rolls to jobs directly from his/her home each day, enter the technician's home address.

h. In the **Email** field, type the technician's business email address (up to 50 characters).

Note: If you want Installs to directly contact the technician regarding jobs, enter the technician's work email address. If you prefer that Installs contact you or your office/dispatcher about jobs, enter the email address you want Installs to use.

5. Click the **Submit** button.

Note: This adds the new technician to the *Inactive Technicians* list on the screen. For the purposes of this document, we are creating and maintaining a technician named BEN JONES.
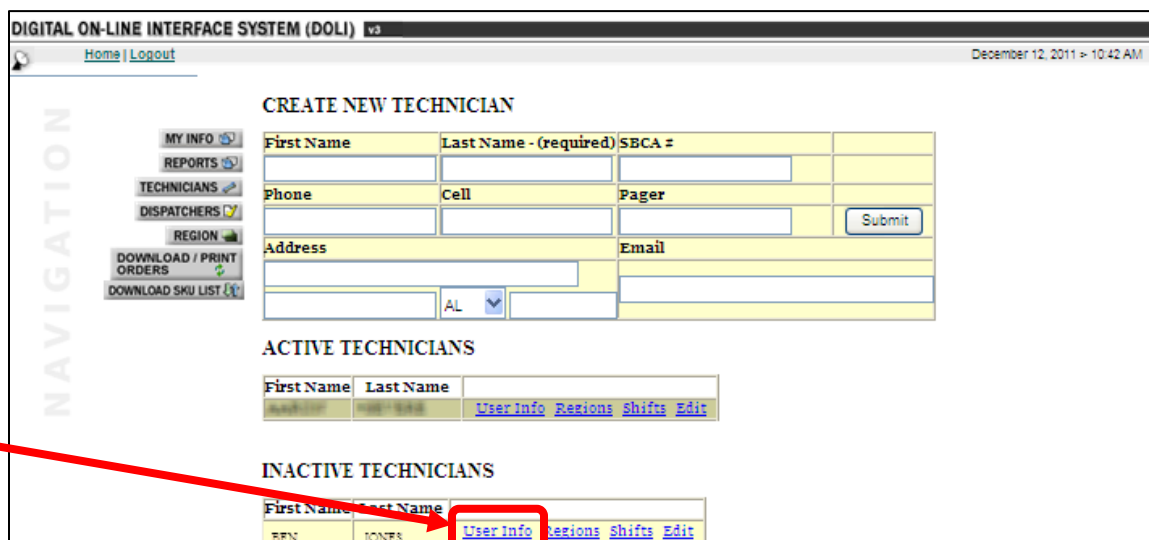
Figure 5
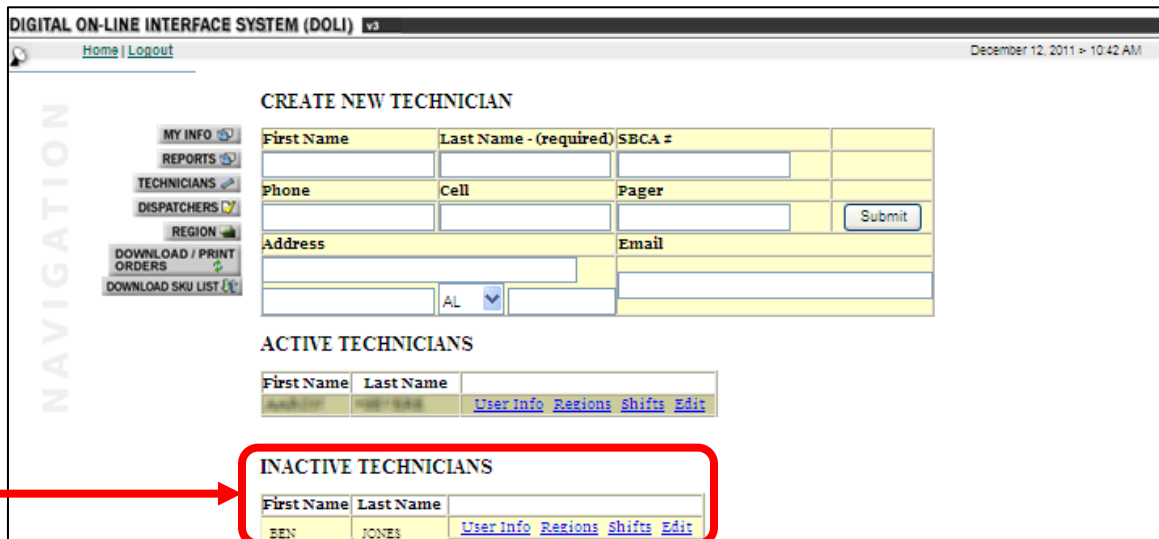
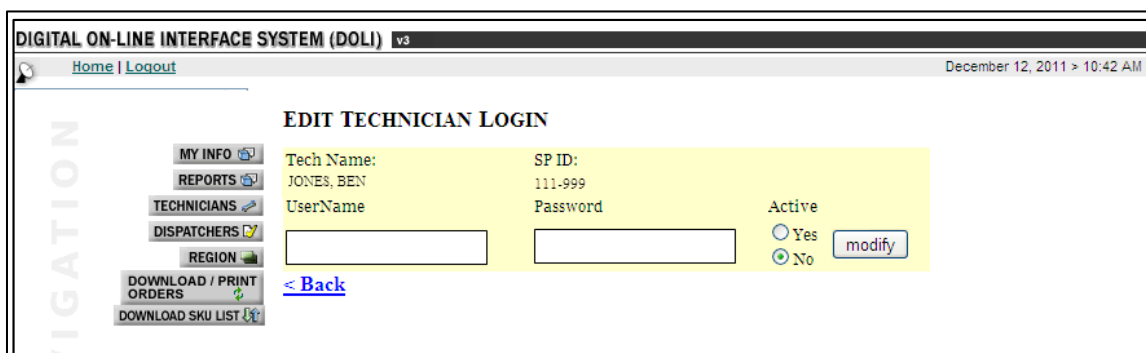### Step III: Create a DOLI username and password for the technician

6. On the *Create New Technician* screen, click the **User Info** link next to the new technician's name.

Figure 6

Note: This displays the *Edit Technician Login* screen.

Figure 7

Note: This feature allows you to create a unique username and password for the technician to access DOLI and allows you to update the technician's status for Installs jobs. You **must** complete this step in order for the technician to receive and update Installs work via DOLI.

The **SP ID** that appears on this screen is simply a unique identifier DOLI automatically assigns to each technician.

a. In the **UserName** field, type a username for the technician to use to log in to DOLI (up to 30 characters).

Note: The username you create for the technician is case-sensitive; if you enter uppercase and lowercase letters, the technician will need to be sure s/he types the correct casing when logging in to DOLI.

Example: If you create username **benjones1970**, the technician must type the username in all lowercase letters when logging in to DOLI. If you create username **BenJones1970**, the technician must type the username with the same capital and lowercase letters you used when you created the username.

Installs recommends that you consider using the technician's work email address (e.g. name@domain.com) as the technician's DOLI username.

b. In the **Password** field, type a password for the technician to use to log in to DOLI (up to 32 characters).

Note: Passwords must comply with the following requirements:
- Contain at least eight (8) characters
- Contain at least one (1) number
- Contain at least one (1) letter

- Contain at least one (1) capital letter
- May contain special characters such as !, @, #, $, %, ^, &, *, -, _, +, etc.

Example: Unacceptable password: **hockeyfan**

Acceptable password: **Hock3yF@n!**

The password you create for the technician is case-sensitive; when logging in to DOLI, the technician must type the password with the same capital and lowercase letters you used when you created the password.

For security reasons, the password will be masked as you type it; you will see ••• rather than the characters you actually type. This means that you will not be able to look up the password if the technician later loses it. If the technician loses or forgets his/her password, you must return to the **User Info** link for the technician and create a new password. Neither the installer nor Installs can see or recover forgotten passwords.

c. If the technician is approved to perform jobs for Installs, click **Yes** under **Active** to activate the technician.

d. Click the **modify** button to save the changes.

e. Click the **Back** link to return to the *Create New Technician* screen.

Figure 8
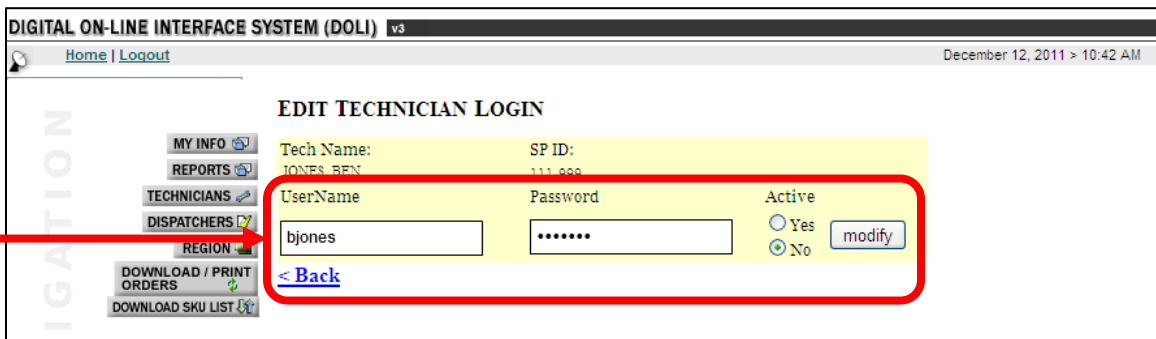
Note: The newly added technician will appear in the *Active Technicians* list when you return to the *Create New Technician* screen.

Figure 9
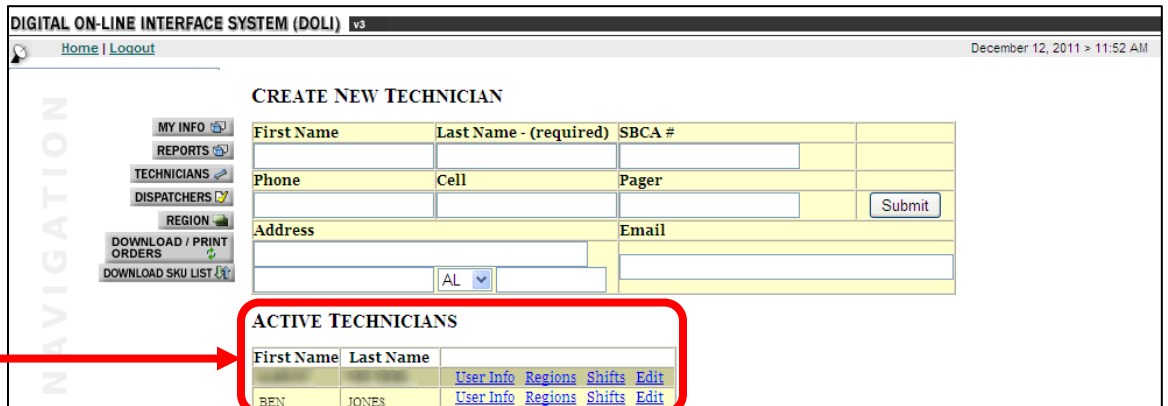
f. Provide the username and password with proper casing to the technician so s/he can access the Technician view of DOLI to view, accept, print, update, and close out jobs.

Step IV: Set up geographic areas technician will work

7. On the *Create New Technician* screen, click the **Regions** link next to the new technician's name.

Figure 10
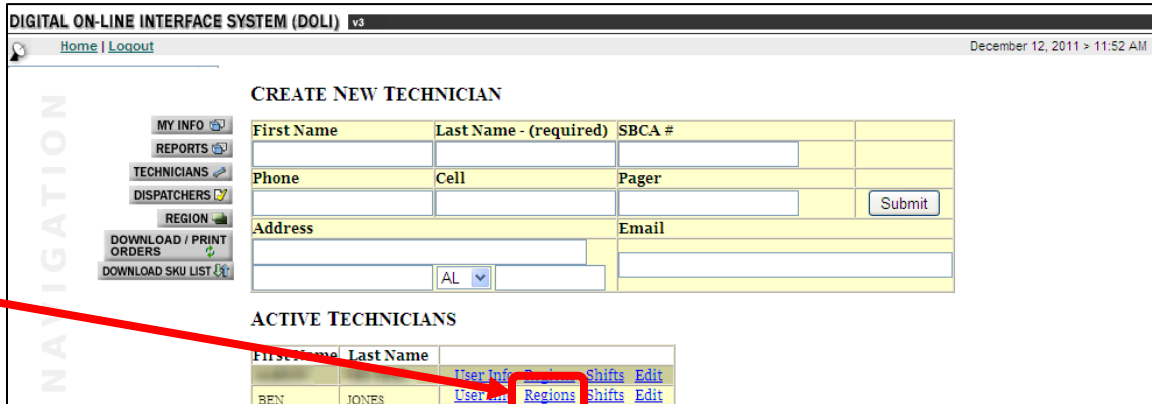
Note: This displays the *Edit Technician Regions* screen.

Figure 11
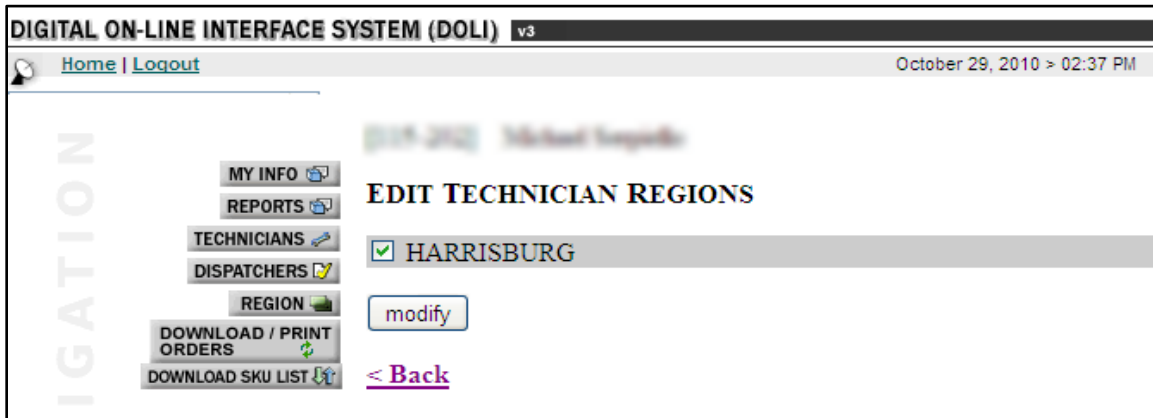
This feature allows you to specify the geographic area(s) in which the technician can be assigned Installs jobs.

a. Click the checkbox corresponding to each geographic region in which the new technician will work.

   Note: The regions displayed are created by Installs when we set up your Installer account. If you need to update your list of regions, contact Installs Field Relations at 1-888-490-4321.

b. Click the **modify** button to save the changes.

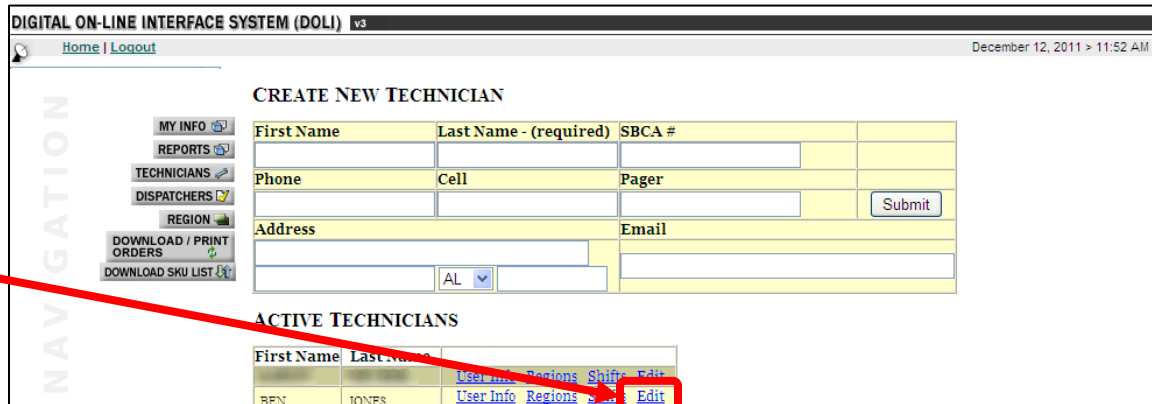c. Click the **Back** link to return to the *Create New Technician* screen.

Figure 12
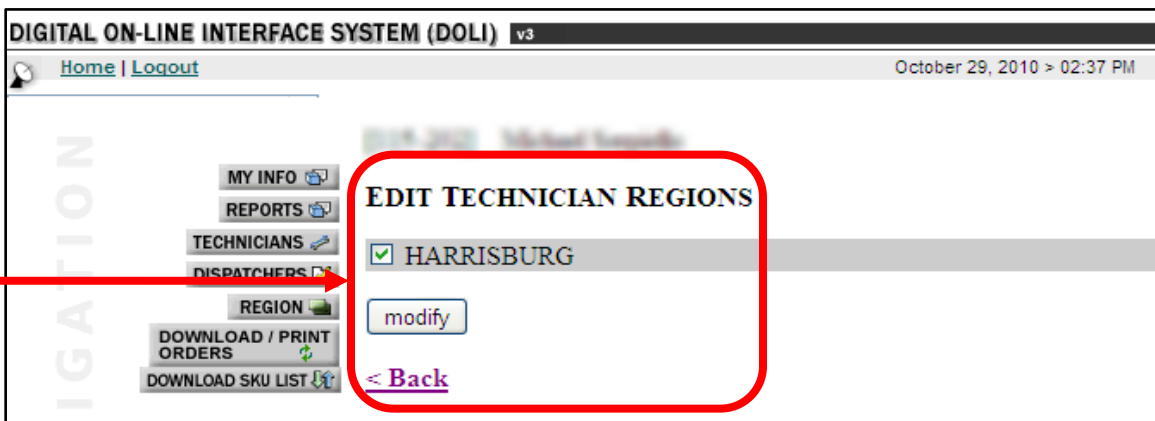
Note: You **must** select a region in order for work to be routed to the technician, and for the technician to be added to your DOLI dispatch board. If you do not select a region, work will not be routed to the technician, as DOLI will not know where the technician works.

Step V: Set up shifts technician will work

8. On the *Create New Technician* screen, click the **Shifts** link next to the new technician's name.

Figure 13
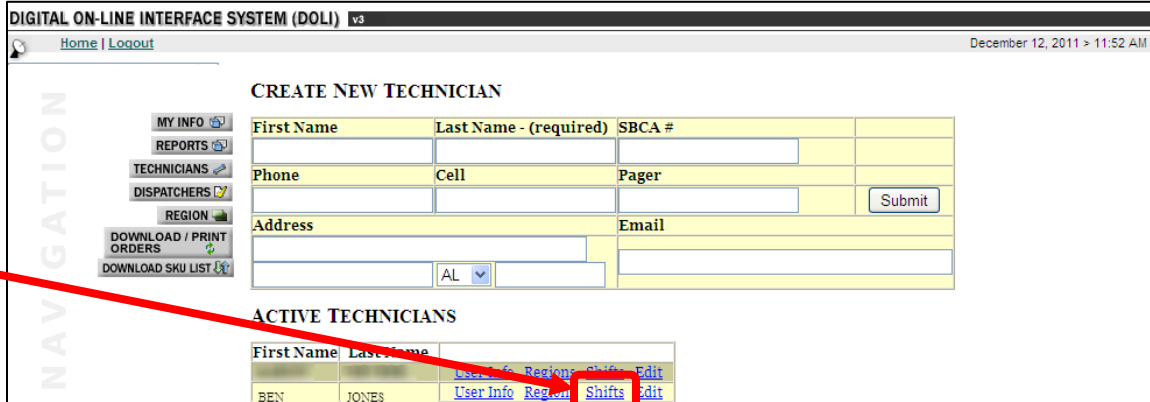
Note: This displays the *Edit Technician Shifts* screen.

Figure 14
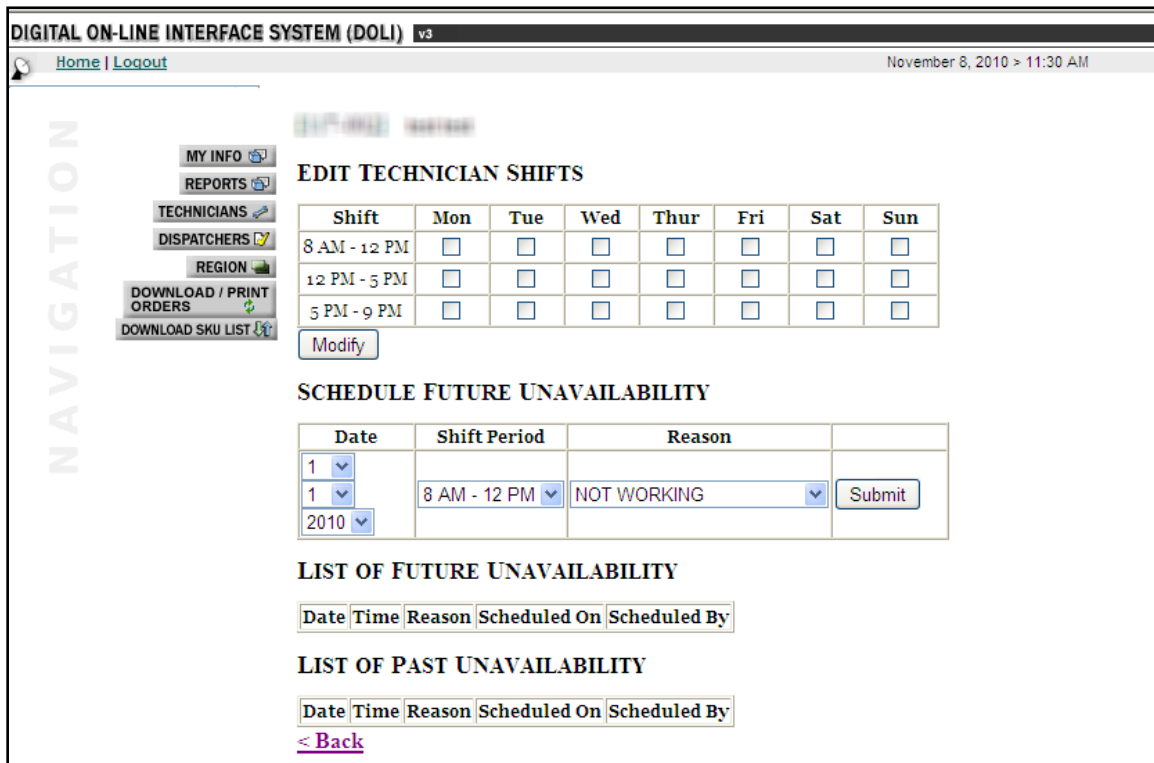
This feature allows you to specify the days of the week and shifts that the technician works.

a. Under **Edit Technician Shifts**, click the checkboxes corresponding to the timeframes that the technician is available to work each day of the week.

b. Click the **Modify** button to save the technician's shifts.

Figure 15

Step VI: Set up technician's future time off (shift exception)

9. Stay on the *Edit Technician Shift*s screen.

10. If you know that the technician will not be available for Installs jobs for specific shifts on specific dates, enter the time off in DOLI under **Schedule Future Unavailability**.

    Note: This feature allows you to notify Installs when a technician will be unavailable to complete Installs jobs.

    > **!** *See the "Shift Exceptions" section of this document for more information.*

    a. Select the **Date, Shift Period, and Reason** from the drop-down lists provided.
    b. Click the **Submit** button to save the Future Unavailability.
    c. Click the **Back** link to return to the *Create New Technician* screen.

    Figure 16
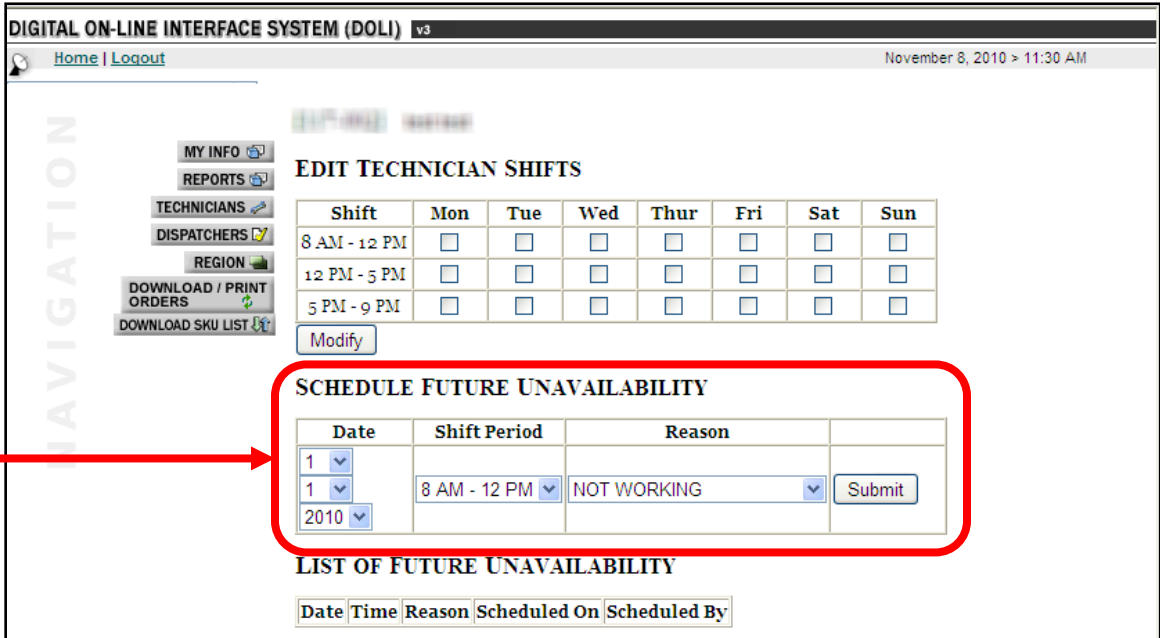
Note: The system will only route work to the technician for the shifts indicated as available.

Step VII: Set up technician's contact information and travel parameters

11. On the *Create New Technician* screen, click the **Edit** link next to the new technician's name.

    Figure 17

Note: This displays the *Edit Technician* screen.

Figure 18

This feature allows you to maintain the technician's contact information, as well as the details about the technician's capacity and travel capabilities for Installs jobs.

a. Under **Edit Technician**, add or update contact information for the technician as necessary.

b. Also under **Edit Technician**, define the area the technician is available to cover.

   Note: DOLI uses the information you enter in the next four fields to determine the most efficient routing of your technician's jobs. It is in your technician's best interest for you to maintain accurate information in the **Starting ZIP Code**, **Ending ZIP Code**, **Efficiency**, and **Maximum Travel Time** fields.

   i. In the **Starting ZIP Code** field, type the ZIP Code from which the technician starts out each day.

   Note: You may enter the technician's home ZIP Code or the ZIP Code of your company's central location. The ZIP Code entered here will help DOLI determine if jobs are within the technician's coverage area. Installs recommends that you use the address/ZIP Code of the technician's daily starting location. For example:

   - If the technician comes to your office every day before rolling to jobs, enter the office's ZIP Code.

   - If the technician starts each day at a warehouse, enter the warehouse ZIP Code.

   - If the technician rolls to jobs directly from his/her home each day, enter the technician's home ZIP Code.

   ii. In the **Ending ZIP Code**, type the ZIP Code in which the technician ends each day.

   Note: For most efficient routing, you should enter the same ZIP Code in the **Starting ZIP Code** and **Ending ZIP Code** fields, unless otherwise instructed by Installs.

iii. In the **Efficiency** field, type the **Efficiency** value that reflects the technician's ability to complete jobs within the standard duration.

Note: DOLI uses the value you enter in the **Efficiency** field to determine how much time a technician has available to complete a job. The following scale should be used to determine what value to enter in the **Efficiency** field:

Efficiency Value	Efficiency Percentage
0	0%
1	30%
2	50%
3	70%
4	90%
5	100%
7	110%
9	120%
11	130%
13	140%
15	150%
17	160%
19	170%
21	180%
23	190%
25	200%
…and so on	

The scale above is used in conjunction with the standard duration assigned to Installs SKUs. Each Installs SKU is assigned a standard duration, which is the amount of time it should take an average-speed, average-skilled technician to complete the job.

Using this scale, a technician who has an **Efficiency** value of 5 is 100% efficient, meaning that s/he completes most jobs within the standard duration assigned to the job (it takes the tech about two hours to complete two-hour jobs). A technician who has an **Efficiency** value of 2 is 50% efficient, meaning that it takes the technician two times the standard duration to complete jobs (it takes the tech four hours to complete two-hour jobs).

The **Efficiency** value is manually determined and maintained by the installer; it is not calculated by Installs or by DOLI. It is important that the installer maintain each technician's **Efficiency** value, adjusting it as technicians become more or less time-efficient on jobs. As previously mentioned, DOLI uses the value in the **Efficiency** field to determine if a technician has enough time available to complete a job that needs to be assigned. Consider the following scenario:

> *You assigned an **Efficiency** value of 2 to inexperienced technician Ben Jones when he started with your company a year ago. Over time, Ben has become quite effective and is able to complete most jobs within the standard duration, but you have not updated his **Efficiency** rating in DOLI; it is still set to 2.*

Because Ben's **Efficiency** value is still set at 2, DOLI "believes" that it still takes Ben two times the standard duration to complete jobs; DOLI "thinks" it takes Ben 4 hours to complete jobs that should be completed in 2 hours. Therefore, Ben may not be considered available for jobs because DOLI "thinks" he will not be able to complete them in time to make it to his next assignments.

By updating Ben's **Efficiency** value to one that more accurately reflects his ability to complete jobs near or within the standard duration, you may make Ben available to DOLI for more jobs. This does not mean that Ben will receive more work, but it does mean that DOLI may present Ben as available more often.

Bottom line: An inaccurate **Efficiency** value can cause technicians to lose out on opportunities for jobs.

iv. From the **Maximum Travel Time** drop-down list, select the maximum amount of time the technician is willing or able to drive from his/her starting ZIP Code to complete a job **WITHOUT** a trip charge.

v. Click the **Submit Edit Technician** button to save the changes.

Figure 19

Step VIII: Set up technician's Job Skills and Client Skills

12. Stay on the *Edit Technician* screen.

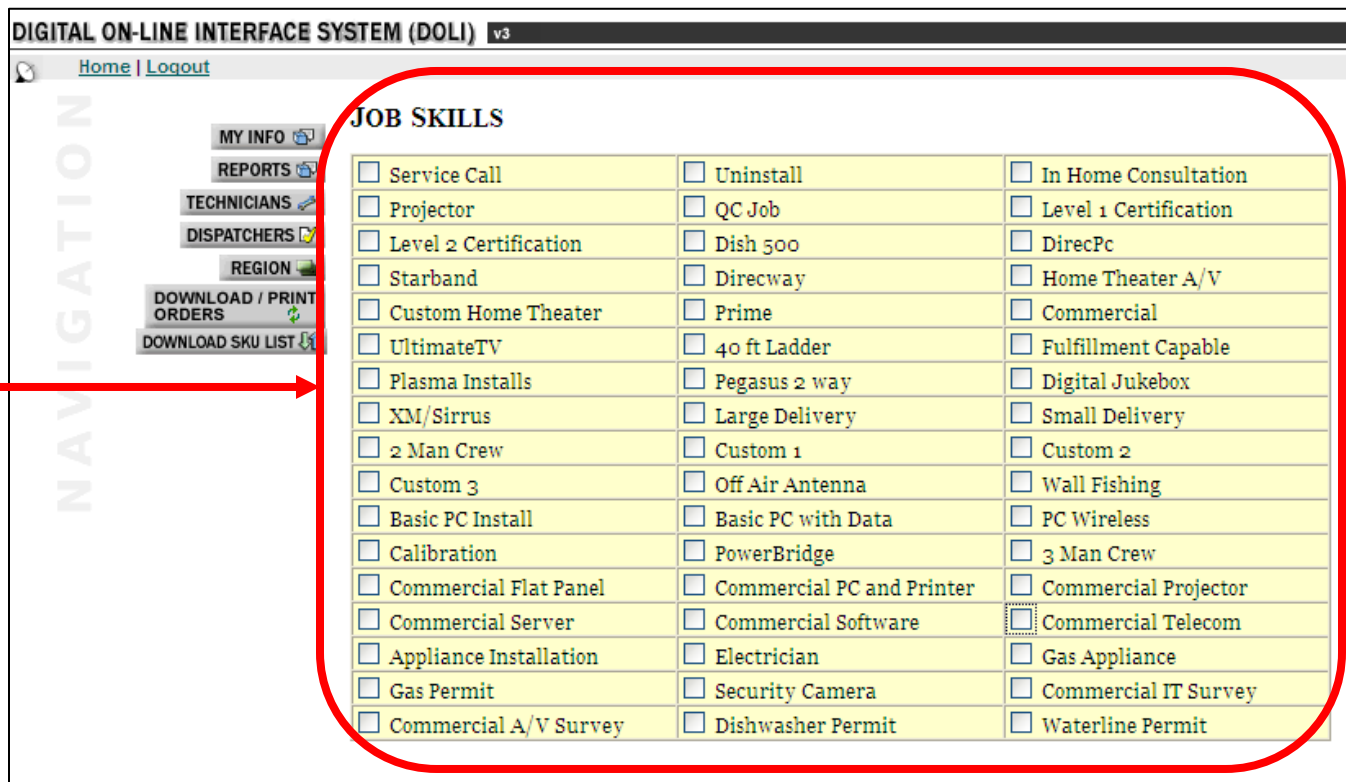13. Under **Job Skills**, click the checkbox corresponding to each Job Skill the technician possesses.

> ! *See the "Appendix I: Job Skills Definitions" section of this document for more information.*

14. Under **Client Skills**, click the checkbox corresponding to each Client Skill the technician possesses.

    Note: The majority of Installs' clients fall under the "Generic Third Party" client skill. If a client has specific requirements regarding the way jobs are assigned to installers, additional skills may be displayed; if you see a specific Client Skill, your company has been set up by Installs to do work for that client. Check all Client Skills displayed on each technician to maximize their opportunities for work assignments.

15. Click the **Submit Job and Client Skills** button to save the changes.

Figure 20

Note: It is important to keep Job Skill and Client Skill sets accurate and current, as the system will only route work to technicians who possess the proper skill sets to complete the job.

Updating an Existing Technician Account in DOLI

1. To edit an existing active or inactive technician, perform the following steps:

   a. On the *Create New Technician* screen, click the link next to the technician's name that corresponds to the type of change you want to make.

   Figure 21

   i. To update the technician's username, password, or Active status, click the **User Info** link.

   > *See the "Making a Technician Inactive" section of this document for more information before setting a technician's Active status to "No."*

   ii. To update the technician's coverage region(s), click the **Regions** link.

   iii. To update the schedule the technician works or to schedule future unavailability for a technician, click the **Shifts** link.

   iv. To update the technician's contact information, Job Skills, or Client Skills, click the **Edit** link.

   b. Make the necessary changes on the screen you selected.

   c. Click the **Modify** or **Submit** button on the selected screen.

   Note: Screens that have multiple sections may have multiple **Modify** or **Submit** buttons. Be sure to click the button that corresponds to the action you are performing.

Making a Technician Inactive

When technicians leave your company, or when you decide that they will no longer work on Installs jobs, you must update their status in DOLI to reflect that they are no longer active Installs technicians. Until you mark the technician as inactive, DOLI will continue to assign jobs to the technician. To avoid missed appointments, you must change the technician's active status in DOLI as soon as you are aware of it.

You must complete this multi-step process to mark technicians as inactivate when they leave your company or when they are removed from Installs work. You must complete the steps in the order they are presented.

Step I: Check DOLI for jobs scheduled to technician in the future

1. On the DOLI homepage, click the **My Account** button.

   Figure 22
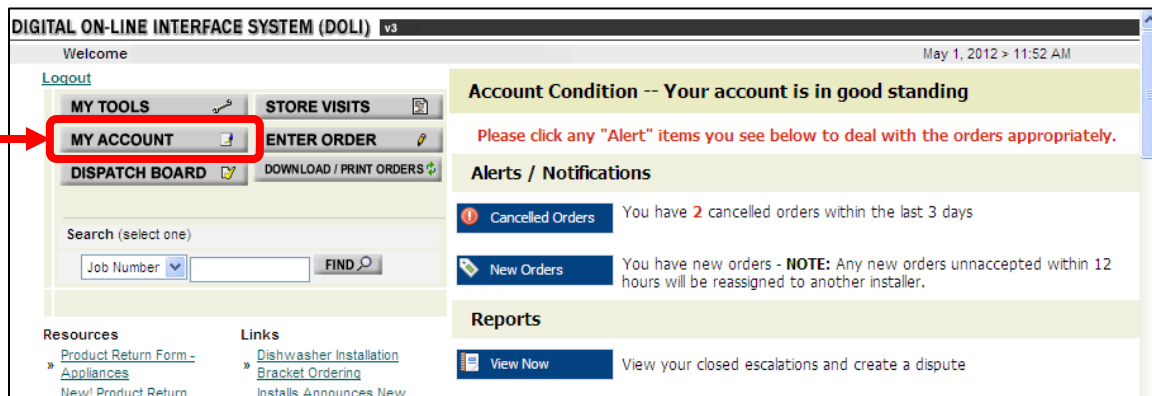
   Note: This displays the *My Orders* screen.

   Figure 23
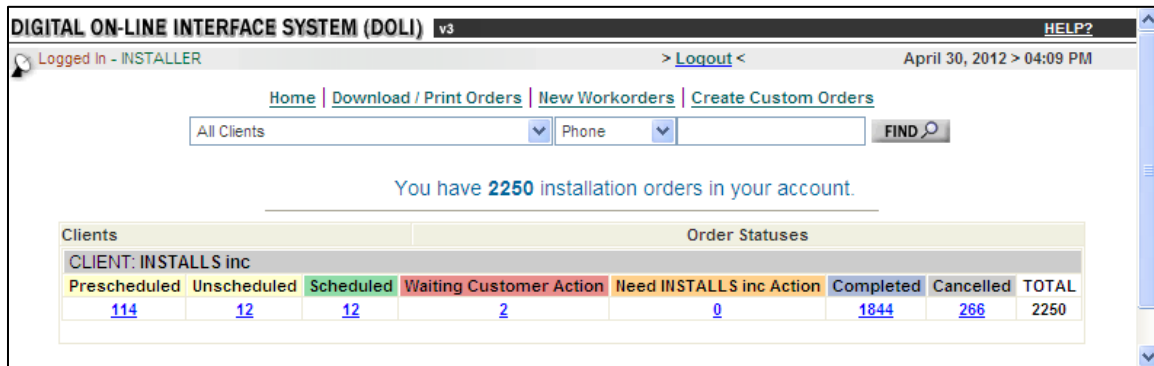
   The hyperlinked number that appears below each color-coded status indicates the number of orders currently in that status. In the example above, there are 12 orders in the status of **Scheduled**.

2. Click the hyperlinked number that appears below the **Scheduled** status.

   Note: This displays the *Status* screen.

Figure 24
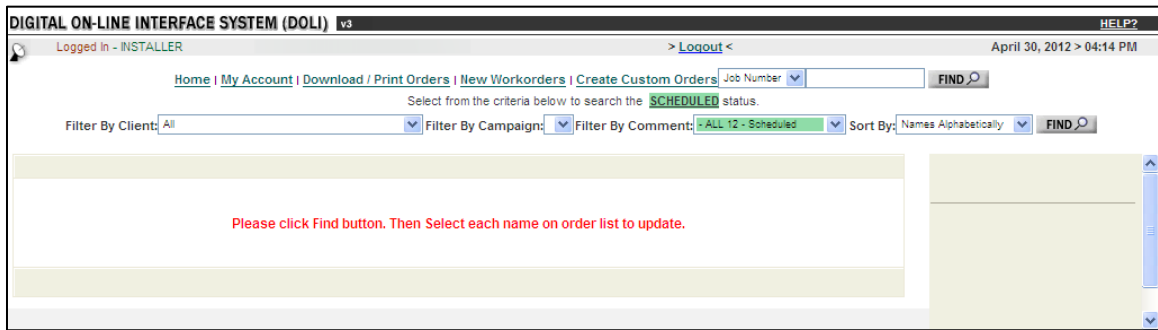
3. Leave all filters at their default settings.
4. Click the **Find** button.

   Note: This displays a list of Scheduled orders on the right side of the *Status* screen.

5. Click the **View Call Sheet** button above the search results.

Figure 25
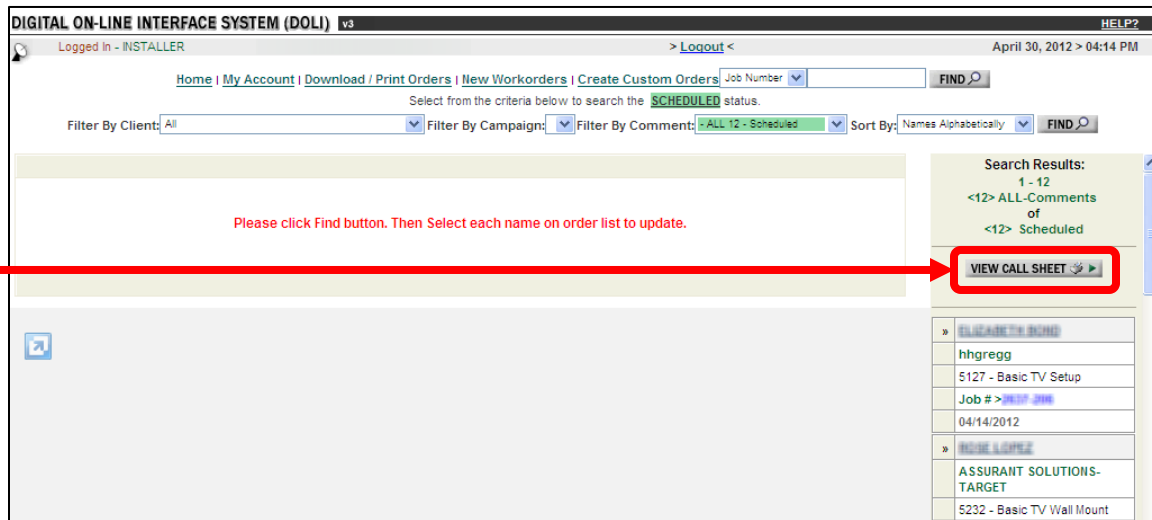
Note: This opens the call sheet for all orders currently scheduled to your company in DOLI in a new window. The technician currently scheduled to complete the job is listed at the bottom of each job record.

Figure 26
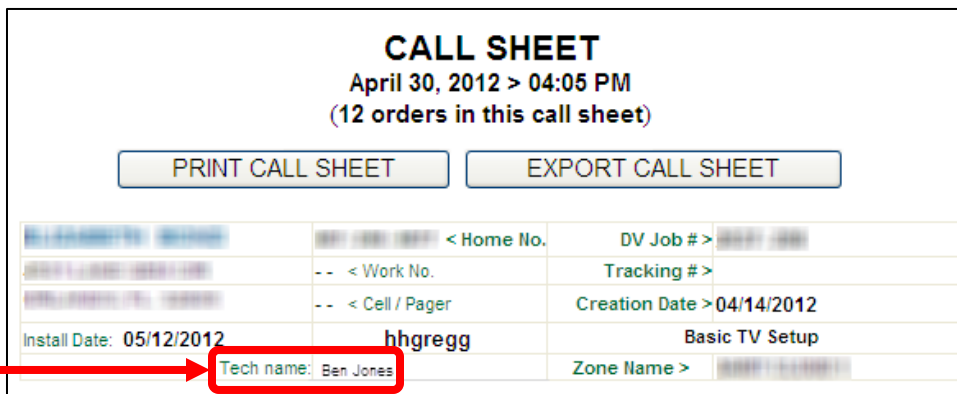
6. Review the Call Sheet to determine if any orders are currently scheduled to the technician you wish to make inactive.

Step II: Reassign jobs on inactive technician's schedule to a different technician

IMPORTANT NOTES BEFORE PROCEEDING:

- If there are jobs currently scheduled to the technician you are changing to inactive, you must reschedule the jobs to a new technician for the **same dates and arrival windows**.

- If you do not have a technician available for the scheduled arrival window, **do NOT move the appointment to another date/time**; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

- If you see the **Re-book** link on the order on the Dispatch Board, then the order has been dispatched. Proceed to the "Perform the following steps to reassign a job that has <u>already been dispatched</u>" section of this procedure.

  OR

- If you do not see the **Re-book** link on the order on the Dispatch Board, then the order has not been dispatched. Skip ahead to the "Perform the following steps to reassign a job that has <u>not yet been dispatched</u>" section of this procedure.

Perform the following steps to reassign a job that has <u>already been dispatched</u>.

7. On the *Status* screen, click the **Home** link.

Figure 27

Note: This returns you to the DOLI homepage.

8. On the DOLI homepage, click the **Dispatch Board** button.

Figure 28
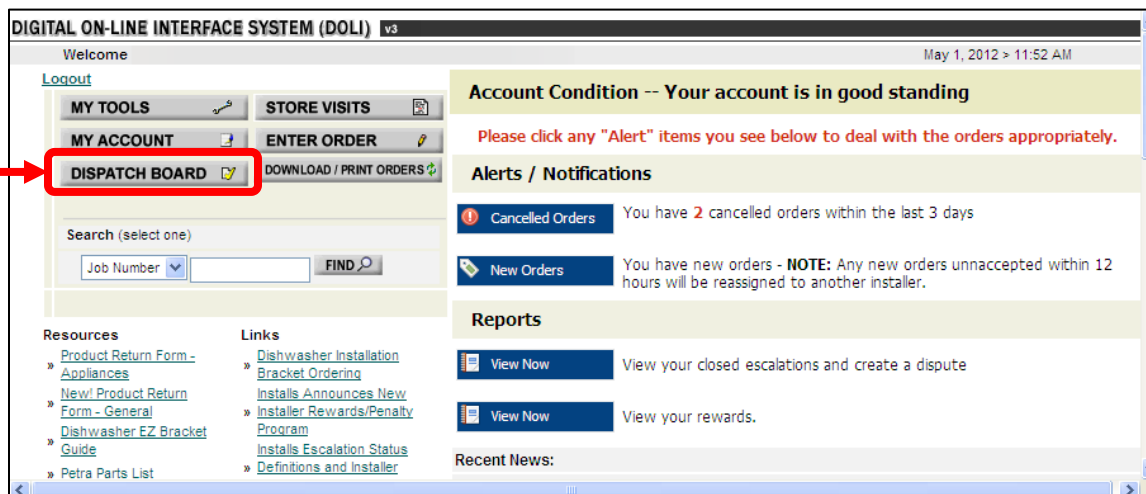
Note: This opens the dispatch board in a new window. If the dispatch board does not open, check your pop-up blocker settings.

Figure 29

9. Locate the first job you wish to reassign.

    Note: If you do not have a technician available for the scheduled arrival window, **do NOT move the appointment to another date/time**; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

10. If the job has already been dispatched, you will see a **Re-book** link on the order:

    Figure 30

11. Click the **Re-book** link on the order on the Dispatch Board.

    Note: This displays a confirmation dialog box.

Figure 31

12. Click the **OK** button on the confirmation dialog box.

> **Note:** This hides the order from the Dispatch Board. The jobs assigned to the rest of your technicians for this day are displayed. Find a different technician with the same date and arrival window timeslot available.

13. Click the **Book** link in the **SAME** arrival window timeslot on the **SAME** date under the new technician.
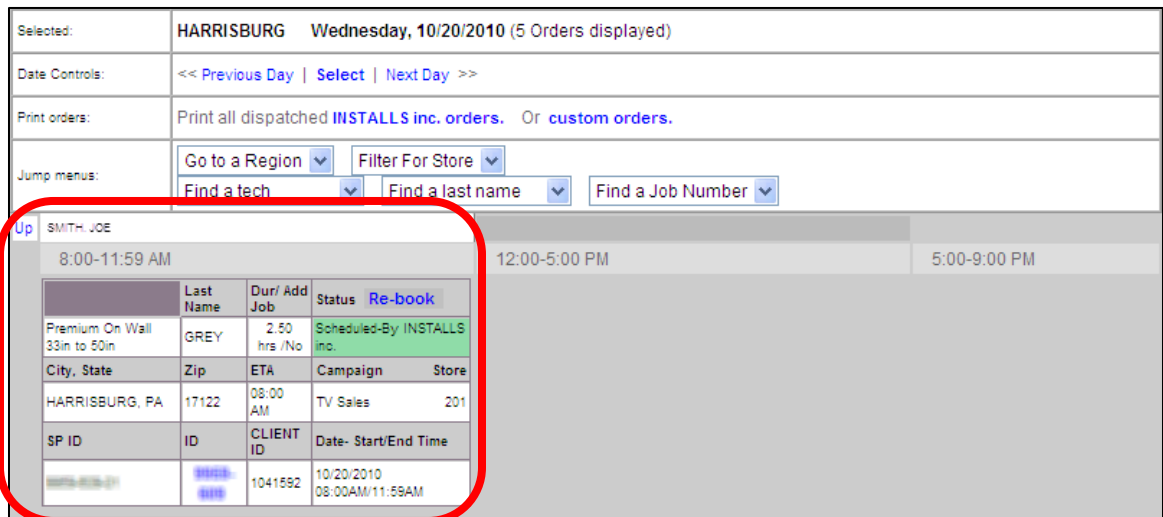
> **Note:** If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.
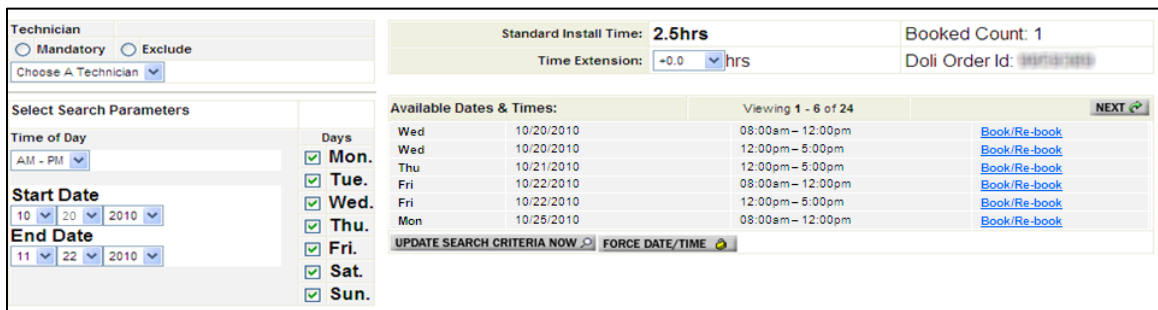
Figure 32
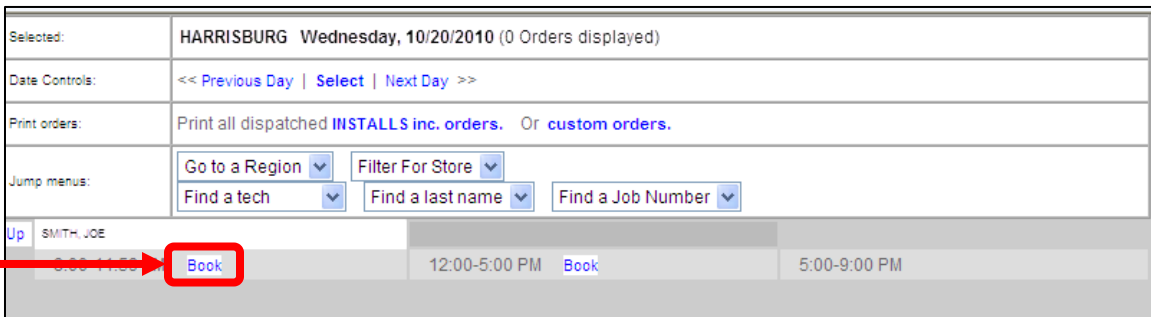
> **Note**: This places the order in the selected timeslot under the new technician. The job is now reassigned to the new technician.

Figure 33

14. Repeat these steps for all dispatched jobs currently assigned to the technician you are making inactive.

Perform the following steps to reassign a job that has <u>not yet been dispatched</u>:

Note: If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

15. Search for the individual order in DOLI.
16. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

Figure 34
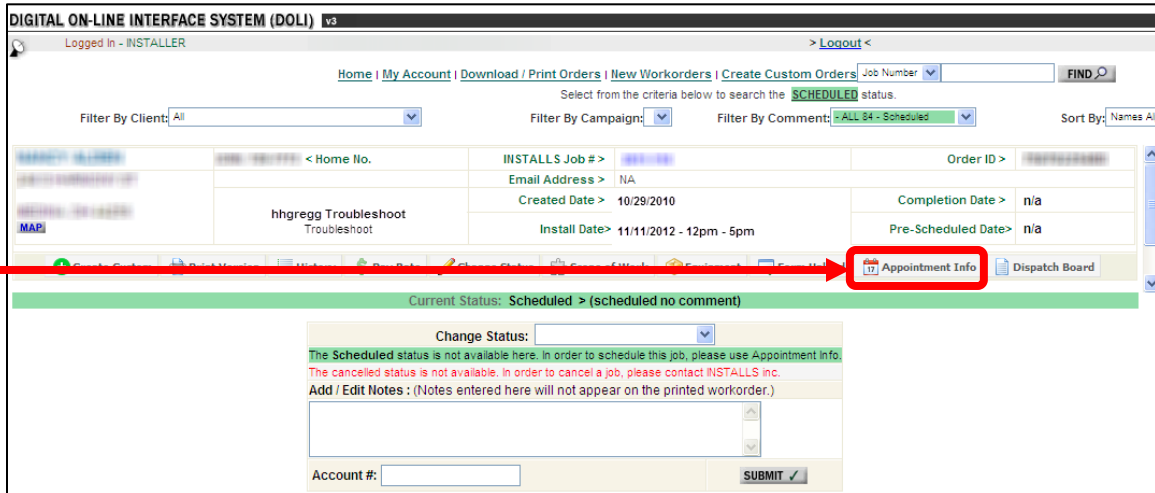
Note: This displays the appointment options in the lower portion of the screen.

Figure 35

17. Toggle the **Technician** radio button to **Mandatory**.
18. From the **Choose a Technician** drop-down menu, select the name of the technician to whom you wish to reassign the job.
19. Click the **UPDATE SEARCH CRITERIA NOW** button.

Figure 36
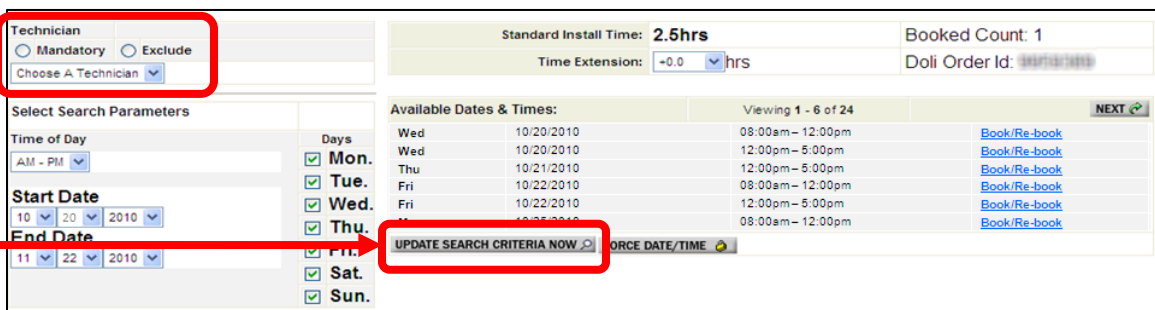
Note: This refreshes the list of Available Dates & Times based on the selected technician.

20. Click the **Book/Rebook** link next to the same date and time the job was originally scheduled.

Figure 37

Note: This displays the appointment confirmation screen.

Figure 38

21. Click the **ACCEPT BOOKING** button on the appointment confirmation screen.

   Note: This reassigns the job to the new tech and displays the order history, indicating that the order has been scheduled to the new technician.
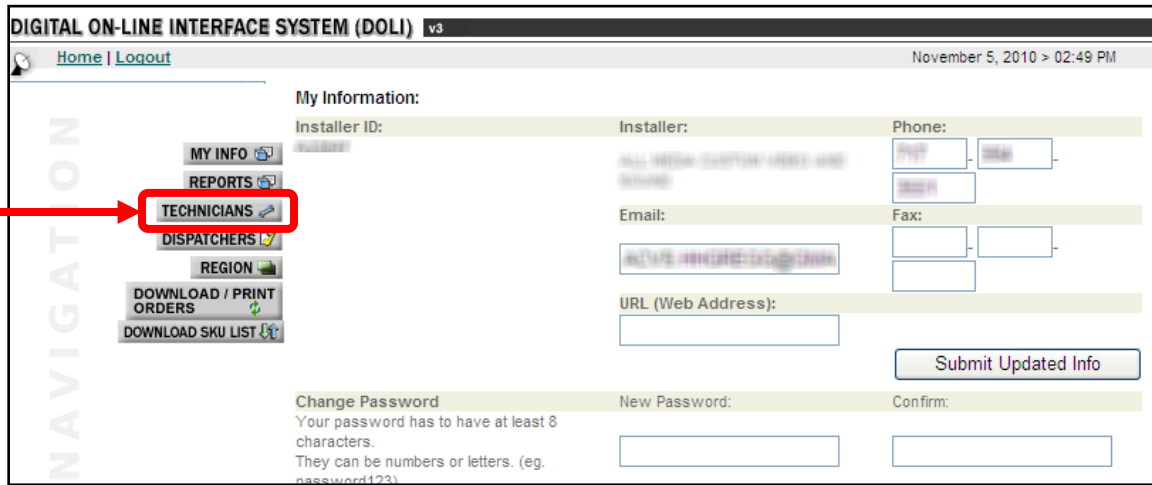
Figure 39

22. Repeat these steps for all non-dispatched jobs currently assigned to the technician you are making inactive.

Step III: Change Technician's Active status to "No"

23. Log in to DOLI using the installer username and password provided to you by the Installs Field Relations team.
24. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.
25. On the *My Information* screen, click the **TECHNICIANS** button.

Figure 40

Note: This displays the *Create New Technician* screen.

26. On the *Create New Technician* screen, click the **User Info** link next to the name of the technician you wish to make inactive.

Figure 41
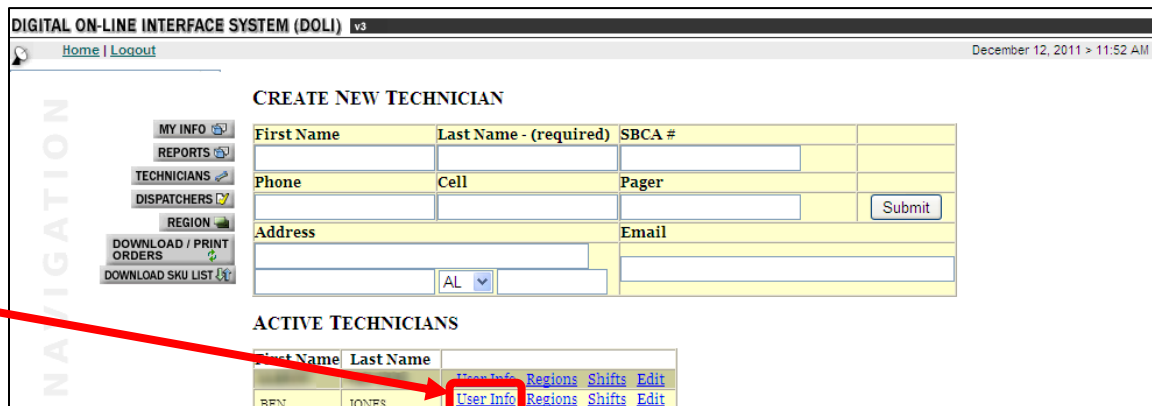
27. Click **No** under **Active** to make the technician inactive.
28. Click the **modify** button to save the changes.
29. Click the **Back** link to return to the *Create New Technician* screen.

Figure 42
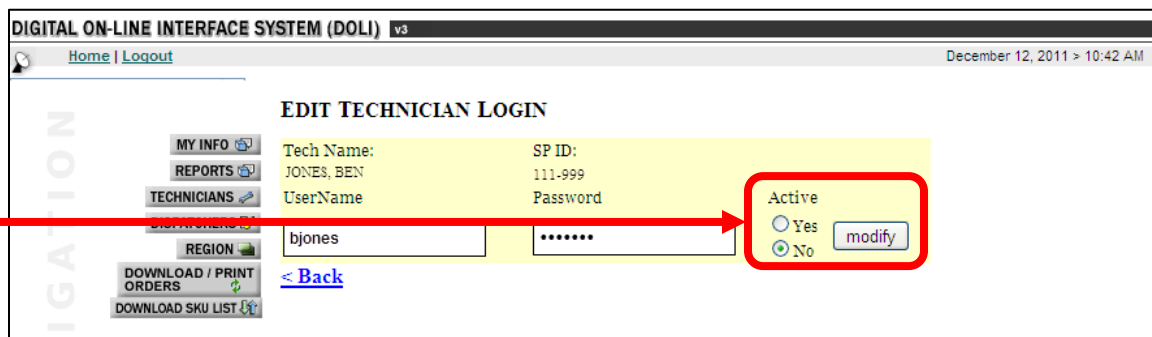
Note: The newly deactivated technician will appear in the *Inactive Technicians* list when you return to the *Create New Technician* screen. You **must** complete this step in order for the technician to stop receiving work from Installs.

Figure 43

SHIFT EXCEPTIONS (ADDITIONAL DAYS OFF, SICK DAYS, HOLIDAYS)

A shift exception refers to a day off outside of the technician's normally scheduled days off. For example, if a technician generally works Tuesday through Saturday, with Sunday and Monday as his normal days off, and decides to take a vacation day on Thursday, January 12, then Thursday, January 12 is considered a shift exception.

When your technicians need to take days off in addition to their regularly scheduled days off (e.g., vacation days), you **must** update DOLI to ensure that jobs are not assigned to them while they are off. You should enter shift exceptions into DOLI with as much advance notice as possible.

If your company will have limited or no technician coverage due to a holiday observance, you **must** communicate your company/technician availability/unavailability to Installs at the correct territory email address (below) as early as possible to ensure that jobs are not assigned to your technicians during the day(s) off. **This is especially critical during the months of November and December and for installers who are store primaries.**

Territory Email Addresses

| States	Territory Email Address
CT, DE, ME, MA, NH, NJ, NY, PA, RI, VT	T1@installs.com
DC, MD, NC, VA, WV	T2@installs.com
AL, GA, MS, SC, TN	T3@installs.com
FL	T4@installs.com
IN, KY, MI, OH	T5@installs.com
IL, IA, MN, NE, ND, SD, WI	T6@installs.com
AR, CO, KS, LA, MO, NM, OK, TX	T7@installs.com
AK, AZ, CA, HI, ID, MT, NV, OR, UT, WA, WY	T8@installs.com
All Compliance paperwork; general field inquiries	fieldrelations@installs.com

> *See the "Entering a Shift Exception in DOLI" section of this document for more information on setting a technician's day off.*

Entering a Shift Exception in DOLI

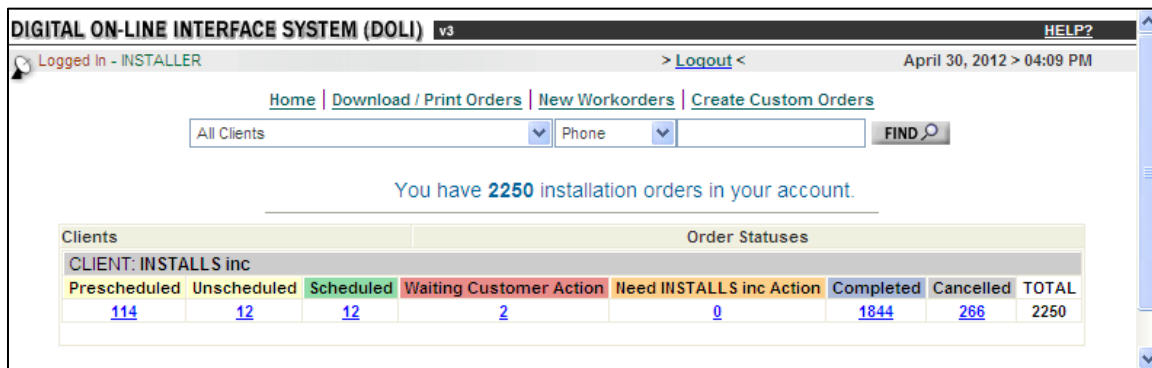### *Step I: Check DOLI for jobs scheduled to technician on the day off date*

1. On the DOLI homepage, click the **My Account** button.

   Figure 44
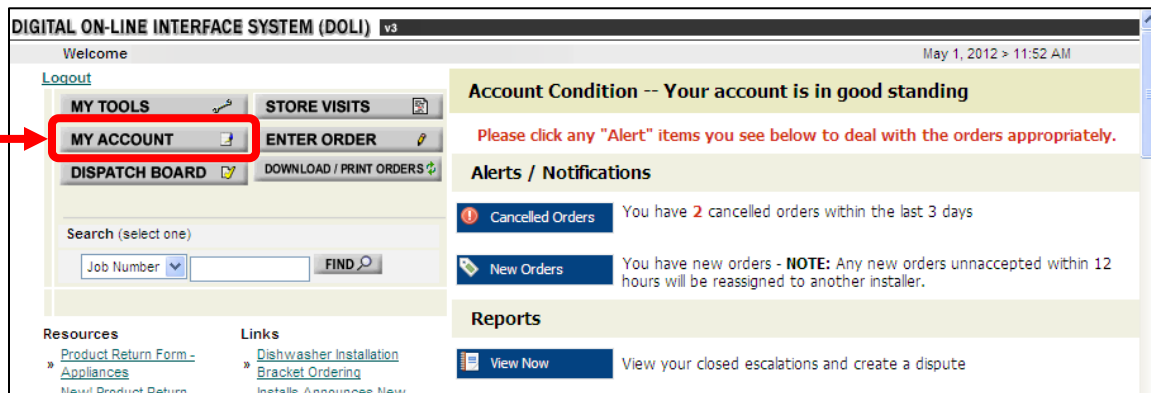
   Note: This displays the *My Orders* screen.
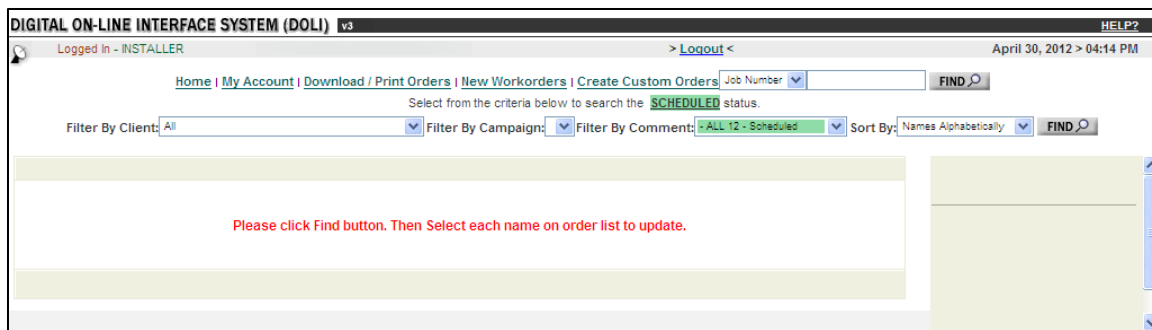
Figure 45

The hyperlinked number that appears below each color-coded status indicates the number of orders currently in that status. In the example above, there are 12 orders in the status of **Scheduled**.

2. Click the hyperlinked number that appears below the **Scheduled** status.

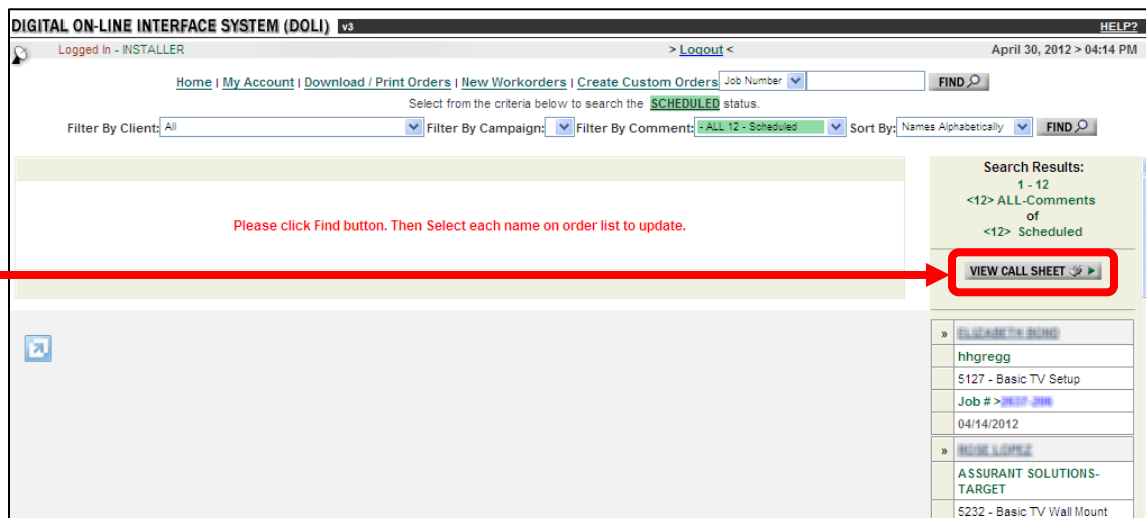**Note:** This displays the *Status* screen.

Figure 46

3. Leave all filters at their default settings.
4. Click the **Find** button.

Note: This displays a list of Scheduled orders on the right side of the *Status* screen.

5. Click the **View Call Sheet** button above the search results.

Figure 47

Note: This opens the call sheet for all orders currently scheduled to your company in DOLI in a new window. The technician currently scheduled to complete the job is listed at the bottom of each job record.

Figure 48

6. Review the call sheet to determine if any orders are currently scheduled to the technician you wish to make inactive.

Step II: Reassign jobs on technician's schedule to a different technician
IMPORTANT NOTES BEFORE PROCEEDING:

- If there are jobs currently scheduled to the technician on the date s/he is taking off, you **must** reschedule the jobs to a new technician for the **same dates and arrival windows**.

- If you do not have a technician available for the scheduled arrival window, **do NOT move the appointment to another date/time**; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

- If you see the **Re-book** link on the order on the Dispatch Board, then the order has been dispatched. Proceed to the "Perform the following steps to reassign a job that has already been dispatched" section of this procedure.

  OR

- If you do not see the **Re-book** link on the order on the Dispatch Board, then the order has not been dispatched. Skip ahead to the "Perform the following steps to reassign a job that has not yet been dispatched" section of this procedure.

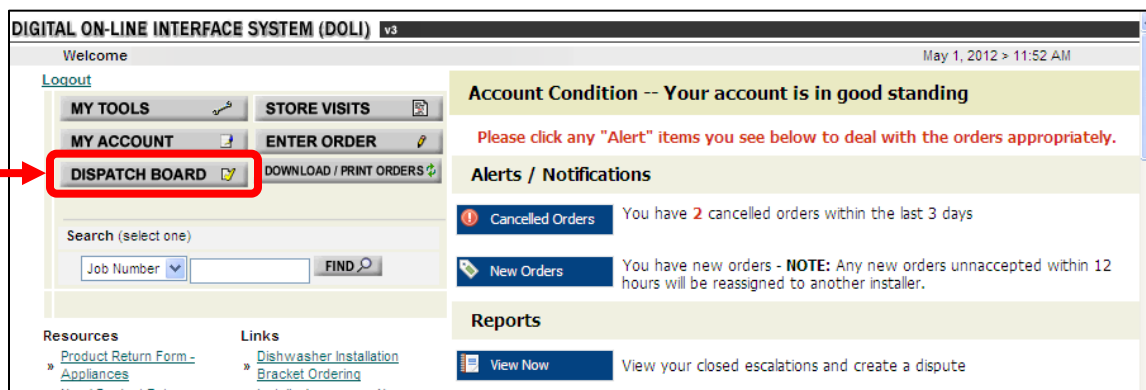**Perform the following steps to reassign a job that has already been dispatched.**

7. On the *Status* screen, click the **Home** link.

Figure 49

Note: This returns you to the DOLI homepage.

8. On the DOLI homepage, click the **Dispatch Board** button.

Figure 50

Note: This opens the dispatch board in a new window. If the dispatch board does not open, check you pop-up blocker settings.

Figure 51

9. Locate the first job you wish to reassign.

    Note: If you do not have a technician available for the scheduled arrival window, **do NOT move the appointment to another date/time**; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

    If the job has already been dispatched, you will see a **Re-book** link on the order:
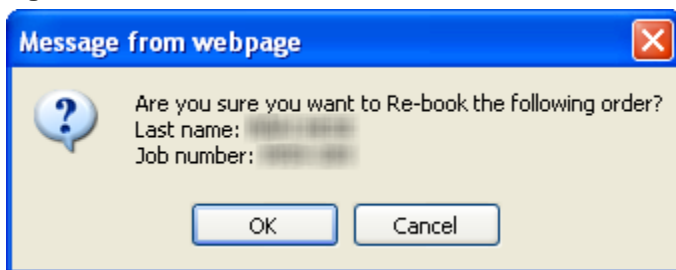
Figure 52

10. Click the **Re-book** link on the order on the Dispatch Board.

    Note: This displays a confirmation dialog box.

Figure 53

11. Click the **OK** button on the confirmation dialog box.

    Note: This hides the order from the Dispatch Board. The jobs assigned to the rest of your technicians for this day are displayed. Find a different technician with the same date and arrival window timeslot available.

12. Click the **Book** link in the **SAME** arrival window timeslot on the **SAME** date under the new technician.

    Note: If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

    Note: If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

Figure 54

Note: This places the order in the selected timeslot under the new technician. The job is now reassigned to the new technician.

Figure 55

13. Repeat these steps for all dispatched jobs currently assigned to the technician who needs a shift exception.

Perform the following steps to reassign a job that has not yet been dispatched:

Note: If you do not have a technician available for the scheduled arrival window, do **NOT** move the appointment to another date/time; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

14. Search for the individual order in DOLI.

15. Click the **APPOINTMENT INFO** button on the Order Tool Bar.

Figure 56

Note: This displays the appointment options in the lower portion of the screen.

Figure 57

16. Toggle the **Technician** radio button to **Mandatory**.

17. From the **Choose a Technician** drop-down menu, select the name of the technician to whom you wish to reassign the job.

18. Click the **UPDATE SEARCH CRITERIA NOW** button.

Figure 58

Note: This refreshes the list of Available Dates & Times based on the selected technician.

19. Click the **Book/Rebook** link next to the same date and time originally scheduled.

    Note: This displays the appointment confirmation screen.

Figure 59

20. Click the **ACCEPT BOOKING** button on the appointment confirmation screen.

    Note: This reassigns the job and displays the order history, indicating that the order has been scheduled to the new technician.

Figure 60

21. Repeat these steps for all non-dispatched jobs currently assigned to the technician who needs a shift exception.

Step III: Schedule technician's day off (shift exception)

22. Log in to DOLI using the installer username and password provided to you by the Installs Field Relations team.
23. On the Main Navigation Bar on the DOLI homepage, click the **MY TOOLS** button.
24. On the *My Information* screen, click the **TECHNICIANS** button.

Figure 61
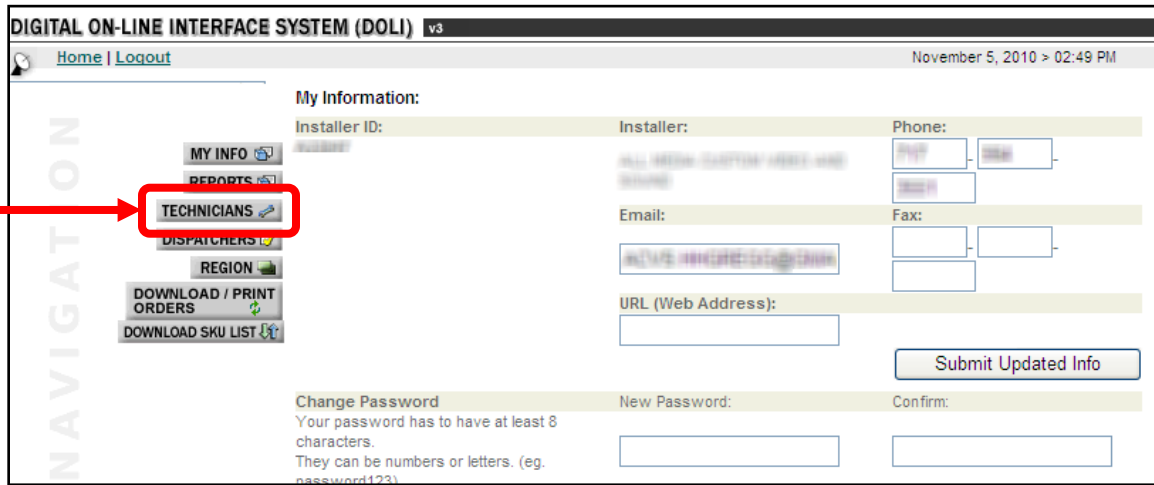
Note: This displays the *Create New Technician* screen.

25. On the *Create New Technician* screen, click the **Shifts** link next to the technician's name.

Figure 62
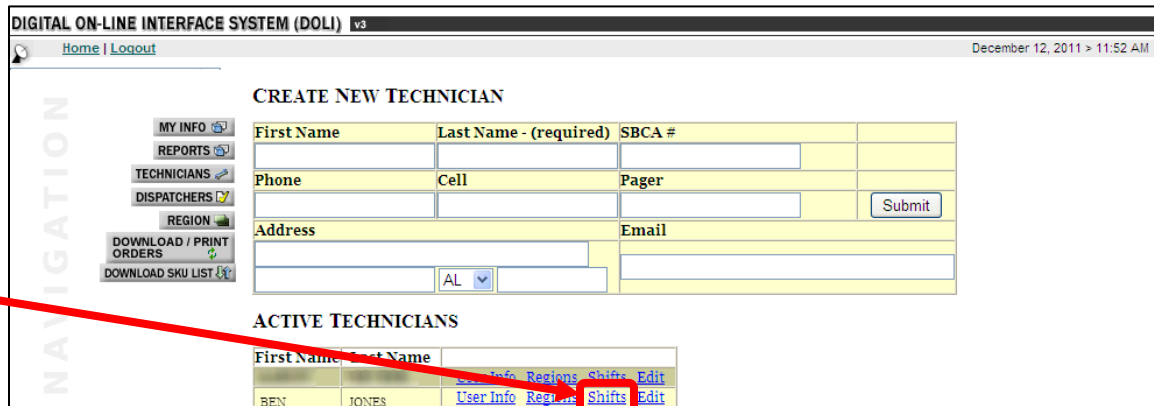
26. Enter the date(s) and shift(s) the technician will be off under **Schedule Future Unavailability**.
    a. Select the **Date, Shift Period, and Reason** from the drop-down lists provided.
    b. Click the **Submit** button to save the Future Unavailability.
       Note: If the technician will be off for more than one day/shift, repeat the two previous steps for each date/shift the technician will be off.
    c. Click the **Back** link to return to the *Create New Technician* screen.

Figure 63

Note: The system will only route work to the technician for the shifts indicated as available.

SUMMARY

- Installs performs background checks on every technician an installer wants use for Installs work.

- **Do NOT set up DOLI accounts for technicians who have failed, or have not had, an Installs background check.**

- Installs will not be able to assign work to your technicians until you enter them into the DOLI system; set them up as soon as they pass the Installs background.

- Every technician working on Installs jobs needs a DOLI username and password.

- Your technicians will not see the same DOLI screens you see.

- When there is any change in the information you entered into DOLI about your technicians, you **MUST** update the technician's profile in DOLI to ensure that jobs and communications are properly routed to him/her.

- DOLI uses the information you enter in the next four fields to determine the most efficient routing of your technician's jobs. It is in your technician's best interest for you to maintain accurate Starting ZIP Code, Ending ZIP Code, Efficiency, and Maximum Travel Time information on each technician's DOLI profile.

- It is important to keep Job Skill and Client Skill sets accurate and current, as the system will only route work to technicians who possess the proper skill sets to complete the job.

- When technicians leave your company, or when you decide that they will no longer work on Installs jobs, you must update their status in DOLI to reflect that they are no longer active Installs technicians. Until you mark the technician as inactive, DOLI will continue to assign jobs to the technician.

- Before deactivating a technician or setting up a shift exception, you must check DOLI for any jobs scheduled to the technician in the future. If there are, you must reassign the jobs to a new technician for the **SAME dates and arrival windows**.

- If you do not have a technician available for the scheduled arrival window, **do NOT move the appointment to another date/time**; you **MUST** call Installs at 1-888-490-4321 to reschedule the appointment so we can reset the appointment with the customer.

APPENDIX I: JOB SKILLS DEFINITIONS

Job Skill	Definition	Job Types Skill Applies to
Service Call	Technician is capable of performing follow-up work on a previous installation	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Projector	Technician is capable of installing projectors; ceiling-mounted projectors, free-standing screens, mounted projection screens, concealed projection screens	Audio Visual (Residential)
Level 2 Certification	No longer used	No longer used
Starband	No longer used	No longer used
Custom Home Theater	Technician is capable of providing customized Home Theater (Residential) solutions; wire concealment, cutting into walls for wiring or speaker/surround sound installation	Home Theater (Residential)
UltimateTV	No longer used	No longer used
Plasma Installs	Technician is capable of performing on-wall TV mounts	Home Theater (Residential)
XM/Sirius	Technician is capable of performing satellite radio installations; antennae, head units, speakers	Audio Visual (Commercial)
2 Man Crew	Technician is available for jobs that require two installers at once	• Appliance (Residential) • Home Theater (Residential)
Custom 3	No longer used	No longer used
Basic PC Install	Technician is capable of performing basic PC set-ups; setting up hardware/peripherals, email, wired internet connection, installing software (including security software)	Personal Computer (Residential)
Calibration	Technician is capable of performing basic TV calibrations; DVD calibrations, Spyder 3 calibrations	Home Theater (Residential)
Commercial Flat Panel	Technician is capable of installing flat panel TVs in commercial settings (offices, restaurants, hospitals, etc.)	Audio Visual (Commercial)
Commercial Server	Technician is capable of installing servers in commercial setting; installing server hardware, installing server software, configuring server software, repairing server software	Personal Computer (Commercial)

Job Skill	Definition	Job Types Skill Applies to
Appliance Installation	Technician is capable of performing basic electric (non-gas) appliance installations; microwaves, disposals, dishwashers, electric dryers, washing machines, refrigerators, electric ranges, electric ovens	Appliance (Residential)
Gas Permit	Technician meets all local requirements for performing installations that require a gas permit to be issued to the customer	Appliance (Residential)
Commercial A/V Survey	Technician is capable of performing site surveys for commercial AV installations	Audio Visual (Commercial)
Fitness Equipment Assembly	Technician is capable of picking up, delivering, and assembling home fitness equipment. Requires proper vehicle (cargo van, box van, box truck, or covered trailer) and the "Large Delivery" Job Skill.	• Fitness Delivery and Set-up
Uninstall	Technician is capable of de-installing previously installed equipment	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
QC Job	Technician is capable of performing checks on the quality of other installers' installation and reporting results to Installs; at client's request	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Dish 500	No longer used	No longer used
Direcway	No longer used	No longer used
Prime	No longer used	No longer used
40 ft. Ladder	Technician has access to a 40 ft. extension ladder	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Pegasus 2 way	No longer used	No longer used
Large Delivery	Technician is capable of performing delivery of equipment; has cargo van, box truck, enclosed trailer, transport ("Sprinter") van	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Custom 1	No longer used	No longer used
Off Air Antenna	Technician is capable of installing antennae for over-the-air TV signals; indoor or outdoor	Home Theater (Residential)

Job Skill	Definition	Job Types Skill Applies to
Basic PC with Data	Technician is capable of performing basic PC set-ups; setting up hardware/peripherals, parts replacement, email, wired internet connection, software installation (including security software), data migration, data back-up, virus and spyware removal	Personal Computer (Residential)
PowerBridge	Technician has completed PowerBridge training course and passed PowerBridge exam on Installs elearning website	Home Theater (Residential)
Commercial PC and Printer	Technician is capable of performing basic PC set-ups at a commercial site; setting up hardware/peripherals, email, wired internet connection	Personal Computer (Commercial)
Commercial Software	Technician is capable installing software at a commercial site	Personal Computer (Commercial)
Electrician	Technician is a licensed electrician	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Security Camera	Technician is capable of installing CCTV security camera systems; DVR set-up, remote IP access	• Audio Visual (Residential) • Audio Visual (Commercial)
In Home Consultation	Technician is capable of performing a consultation in the customer's home to determine product needs and installment feasibility	• Appliance (Residential) • Home Theater (Residential)
Dishwasher Permit	Technician has met any local regulatory requirements for installing dishwashers and is capable of obtaining permits for dishwasher installations.	• Appliance (Residential) • Commercial
Flat Panel TV Repair	Technician is capable of flat panel TV diagnostic and part replacement jobs.	Flat Panel TV Repair
Level 1 Certification	No longer used	No longer used
DirecPc	No longer used	No longer used
Home Theater A/V	Technician is capable of performing basic home theater installations; on-stand TV set-up, basic sound system set-up, no concealment	Home Theater (Residential)
Commercial	Technician is capable of performing commercial installations; AV, PC, IT, Security	Commercial
Fulfillment Capable	Technician is capable of storing product for future installations	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Digital Jukebox	No longer used	No longer used

Job Skill	Definition	Job Types Skill Applies to
Small Delivery	Technician is capable of delivering small products; TVs under 32", PCs, components	• Appliance (Residential) • Home Theater (Residential) • Personal Computer (Residential) • Commercial
Custom 2	No longer used	No longer used
Wall Fishing	Technician is capable of running cable in walls; cable TV, satellite, whole-house wiring, commercial cabling	• Home Theater (Residential) • Commercial
PC Wireless	Technician is capable of setting up wireless networking; wireless networks, routers, basic network security	• Personal Computer (Residential) • Personal Computer (Commercial)
3 Man Crew	Technician is available for jobs that require three installers at once	• Appliance (Residential) • Home Theater (Residential)
Commercial Projector	Technician is capable of installing projectors; ceiling-mounted projectors, free-standing screens, mounted projection screens, concealed projection screens in a commercial setting	Audio Visual (Commercial)
Commercial Telecom	Technician is capable of installing commercial phone systems; call routing, voice-over IP	Commercial
Gas Appliance	Technician is capable of performing gas appliance installations	Appliance (Residential)
Commercial IT Survey	Technician is capable of performing an IT site survey in the customer's commercial setting to determine product needs and installment feasibility; tech has advanced IT skills	Information Technology (Commercial)
Waterline Permit	Technician has met any local regulatory requirements for installing waterlines and is capable of obtaining permits for waterline installations.	• Appliance (Residential) • Commercial
Major Appliance Repair	Technician is capable of major appliance diagnostic and part replacement jobs	Major Appliance Repair