



## Assigning a work order to a technician

### Office Administrator:

This is how you can assign a technician to a work order from the workspace screen

From the work order screen, you will need to locate the **Allocated Technician** box

Work Order # 53726655

Site 5360 5360 - Calhoun, GA

Select Action

Alternate Labor Charge Control		
Technician	Status	Action
+ < Add Technician		

Summary	Potential Duplicates	History	Notices	Contract	Related Calls & Notifications	Links	Site Attributes	Docs
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Equipment Details - No Warranty	Assigned Contractor																							
Dispenser/Tank/Line, Fuel Dispenser Dispenser Barcode: 14023010 Serial = EN142238 Model = E300 - NN1 In-Service Date: 02/17/2008 Warranty Expiration Date: 02/18/2011	<a href="#">Murphy USA Test Provider</a> 200 Peach Street El Dorado, AR 71730 Phone: Fax: E-mail: thomas.wust@murphyusa.com	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="font-weight: bold;">Status</td><td>Assigned</td></tr> <tr><td style="font-weight: bold;">Problem Description</td><td></td></tr> <tr><td style="font-weight: bold;">Problem Type</td><td>Broken Pin</td></tr> <tr><td style="font-weight: bold;">Floor Level</td><td></td></tr> <tr><td style="font-weight: bold;">Department</td><td>Parking Lot</td></tr> <tr><td style="font-weight: bold;">Location Details</td><td>Pump 1 / 2</td></tr> <tr><td style="font-weight: bold;">Not To Exceed (NTE)</td><td>\$750.00</td></tr> <tr><td style="font-weight: bold;">ETA</td><td>09/11/2019 09:30</td></tr> <tr><td style="font-weight: bold;">Priority</td><td>No Dispatch Call</td></tr> <tr><td style="font-weight: bold;">Flagged Condition #</td><td></td></tr> <tr><td style="font-weight: bold;">Access Code</td><td>BB072T3T</td></tr> </table>	Status	Assigned	Problem Description		Problem Type	Broken Pin	Floor Level		Department	Parking Lot	Location Details	Pump 1 / 2	Not To Exceed (NTE)	\$750.00	ETA	09/11/2019 09:30	Priority	No Dispatch Call	Flagged Condition #		Access Code	BB072T3T
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NO CONTRACT																								

Capitalized Work Order	Allocated Technician
No	Currently: No Technician Allocated
Account Code	Select Technician
800638	Allocate Selected Technician
Task Number	

SLA Details			
	Due Date Time	Applied Hours	Actual Date Time
Accept			
Response			
Partial Fix			
Fix			

You will click the **Select Technician** dropdown and choose the technician that you want to assign to this work order.

Allocated Technician	Priority
Currently: No Technician Allocated	
Select Technician	Flagged
Select Technician	
Murphy USA Test Provider Pin User (Do not Modify)	
Test Tech 1	
Thomas Wust	

Once you click **Allocate Selected Technician** and you will see the currently selected technician and 2 new options.

Allocated Technician	Allocated Technician
Currently: No Technician Allocated	Currently: Test Tech 1
Test Tech 1	Select Technician
Allocate Selected Technician	Deallocate <span style="margin-left: 20px;">Reallocate</span>



**Deallocate:** removes the technician assigned to the work order

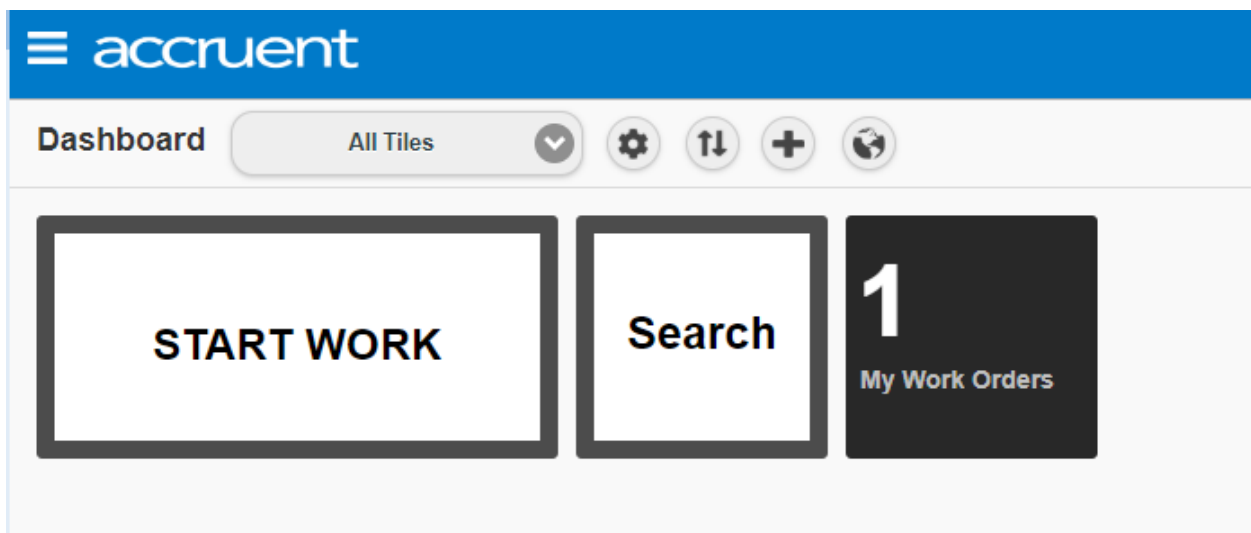
**Reallocate:** allows you to reassign the work order to another technician.

When the office administrator assigns the technician, this will allow the tech to find it quickly on the dashboard either through a dashboard button or filtering when starting or searching for work orders.

**Technician:**

This is how a technician can find work orders assigned to them and start, pause, and job complete the work order.

When a technician logs into Verisae, they will be routed directly to the **Dashboard**. It is recommended that technicians have at least a **Search** and a **My Work Orders** dashboard buttons. This will make searching for your open work orders much easier.



If you do not have either of these buttons, you can create them but clicking the + to bring up the dashboard button creator

If you click the My Work Orders(or created) button it will take you to a list of all work orders assigned to you

Dashboard  
MY WORK ORDERS

Columns... Filter... Viewing 1-1 of 1

Work Order #	Status	Site Name	Site Description	Site Type	Space Type	Space Type	Parent Organization	Location	Provider	Problem Type	Priority	Date Created	Category	Sub Category	Asset Number	Created By	Role	Reported By	Flag	Escalation Reason	ETA	Appri Due
53726655	Assigned	5360	5360 - Calhoun, GA	5360			10636	Parking Lot	Murphy USA Test Provider	Broken Pin	No Dispatch Call	09/11/2019 08:31	Dispenser/Tank/Line	Fuel Dispenser	14023010	NCC Agent	Murphy USA Agent	thomas			09/11/2019 08:30	

Excel Document Export Viewing 1-1 of 1

There are a few options here to help you

**Columns...:** this will allow you to choose what columns are displayed

**Filter...:** this will let you filter your work orders



If you click the **Search** button on your **Dashboard** you will get the **Search** field. When it opens, it may be on the **Asset** search field, make sure that you click on the **Work Order** tab.

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SEARCH  
Select search type using tabs, enter search criteria below and hit search

Asset Work Order

Client

WO Number

Asset Tag#

Fixture No.

Category

Subcategory

WO Status

Priority

WO Type

Site Name

Site Description

Provider

Technician

Search Clear Form Cancel

Once you find the work order, you will now need to add the technician(s) to the work order to start the check in and out process. When the office administrator assigns it, it is for them to know who they assigned it to and for you to be able to find it. The technician must still add themselves to the work order.

You will need to hit the **Add Technician** button in the work order

My Work Orders

← WORK ORDER SUMMARY

#53726655 BROKEN PIN

Summary History

Work Order Status Assigned

Select Action

Workflow

Technician Detail

Technician	Status	Action	Complete
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Add Technician

Parts Detail

Travel Time

Info

When you hit **Add Technician** you will get the Add Technician dialog box



**Add Technician**

Technician

Click the **Technician** dropdown and choose the technician working on site

**Add Technician**

Technician

- Murphy USA Test Provider Pin User (Do not Modify)
- Test Tech 1**
- Thomas Wust

Click **Save**

You will now see the **Technician, Name, Status, Action, and Complete** headings

**Workflow**

**Technician Detail**

Technician	Status	Action	Complete
Test Tech 1	IDLE	<input type="button" value="Start Work"/> <input type="button" value="Pause Work"/>	<input type="button" value="Job Complete"/>

**Parts Detail**

**Travel Time**

**Start Work:** Starts the work you were dispatched for

**Pause Work:** Pauses your current work, there is a dropdown of reasons why you are pausing the work

**Job Complete:** When you are finished with the work you will mark it as Job Complete

When you click **Start Work**, a confirmation dialog box pops up, click **Save**

**Confirm - Test Tech 1**

Confirm Start Job

Note: According to your device, you are currently off-site.



If you are outside of the geofence range, you will get a **Geolocation Error** dialog box. If you click proceed it will finish the **Start Work** process, if you click **Cancel** it will go back to the Confirm Start Job dialog box. (this error will come up on Start Work, Pause Work, Job Complete, and Store Mgr Review)

**Geolocation Error**

Note: According to your device, you are currently off-site. Moving forward will flag this action as being non-compliant with geofencing.

<b>At Site</b>	Off Site
<b>Distance From Site</b>	4969294.619422572 ft
<b>Geofence</b>	1500 ft
<b>Accuracy</b>	+/- 180.44619422572177 ft

Do not show this message again

Once work has started, the **Pause Work** and **Job Complete** options become available

**Workflow**

**Technician Detail**

Technician	Status	Action	Complete
Test Tech 1	WORKING	<input type="button" value="Start Work"/> <input type="button" value="Pause Work"/>	<input type="button" value="Job Complete"/>

**Parts Detail**

**Travel Time**

To pause work, click the **Pause Work** button. This will bring up the Pause Work Dialog box

**Pause Work Order - Test Tech 1**

Pause Reason

Pause Comments

Note: According to your device, you are currently off-site.

You will need to pick the **Pause Reason**, enter **Pause Comments**, and click **Save**



**Estimate submitted for Review:** Used if an estimate has been requested and you are waiting until the estimate has been reviewed

**Estimate Required:** Used to request an estimate, estimate must be completed by Office Administrator

**Parts Needed:** Used when you need to order or pick up parts

**Re-Estimate Requested:** Used when there has been an estimate and another estimate is need

**Work Break:** Used when you need a break, going to lunch, or can't finish the fix that day and need to come back

If you **Pause Work** for any reason, make sure you click **Start Work** again to check back in

To finish the job and check out you will need to click the **Job Complete** button

When you click Job Complete you will get a **Job Complete** dialog box

**Misuse/Abuse:** Use this to let us know if the issue was caused by Misuse or Abuse

**Asset Tag:** If this is blank, you would be able to choose the asset you worked on

**Fault:** This will be what was wrong or worked on

**Action:** This is what was done to resolve the issue



**Complete Comments:** This is the technician comments that need to be specific to how the technician resolved issue.

The technician will need to fill out this out to check out

Once technician has completed job, the work order is now ready for the store manager to sign off

The **Store Mgr Review** dialog box will appear

**Store Mgr Review**

+ **Work Order Detail**

+ **Geolocation Detail**

Satisfied with work completed? Agree Disagree

Level of Satisfaction ★ ★ ★ ★ ★

Review Comments

User Name

Password

SaveNo Reviewer Available

The technician can either hand the mobile device to store manager to fill out the **Store Mgr Review** or click the **No Reviewer Available** button

At this point the work order is either ready for a **Site Review** (this can take up to 3 days to complete) or to be invoiced by the office administration.

**Ability to have Office Administrator assign technician and start, pause or complete job:**

The office administrator can also assign the work order to the technician and check in and out for that technician if they are having issue connecting to Verisae on their mobile device.

They can add them to the **Alternate Labor Charge Control**

Alternate Labor Charge Control		
Technician	Status	Action
<span style="color: #4a7ebb;">+</span> <span style="color: #4a7ebb;">←</span> Add Technician		

Click the **+** to add the technician

Click the **Select Technician** drop down to choose your technician



- Select Technician Idle | Start Work | Pause Job

+ Select Technician  
Murphy USA Test Provider Pin User (Do not Modify)  
Thomas Wust

Start Stop Time

Then you can select **Start Work** and click **Yes** on Confirm Job Start dialog box

**Confirm**

**Confirm Start Job**

Yes No

It will show the status of **Working**

Alternate Labor Charge Control				
Technician		Status	Action	
Test Tech 1		Working	Start Work	Pause Job   Job Complete
+ < Add Technician				
Technician		Start	Stop	Time
1	Test Tech 1	09/11/2019 15:20		
<b>Total time accrued against job.</b>				

You can **Pause Job** and fill out the needed fields

**Service Incomplete Details**

Incomplete Reason

Reason Type

Set Service Incomplete

- Estimate submitted for Review
- Estimated Required
- Parts Needed
- Re-Estimate Requested
- Work Break

You can also **Job Complete** and fill out the needed fields



Confirm	
Confirm Job Complete	
Misuse/Abuse	<input type="text"/>
Asset	14023011 <input type="button" value="🔍"/>
Fault	<input type="text"/>
Action	<input type="text"/>
Technician Comments	<input type="text"/>
<input type="button" value="Complete"/> <input type="button" value="Cancel"/>	

The Office Administrator should only do this **IF** the technician in the field is unable to do it.