ETAdirect SmartManage Interface Overview

GOLD

Version 8

Course Map
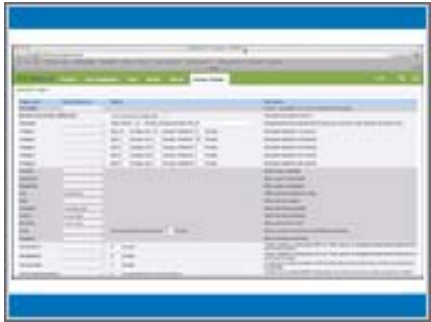
Lesson or Topic	Segment	Word Count	Time Estimate (minutes)
Welcome Video	00000	160 (est.)	1
Course Overview	00010	74	.5
Lesson 1: ETAdirect Resource Tree and Navigation	10010	120	1
Topic 1: Exploring the Resource Tree	11010	655	4
Topic 2: Exploring the Interface	12010	464	3
Topic 3: Setting My Display Options	13010	169	1
Lesson Review	18010	70	.5
Lesson 2: ETAdirect Entity types	20010	95	.5
Topic 1: Resources	21010	133	1
Topic 2: Users	22010	114	1
Topic 3: Activities	23010	123	1
Topic 4: Inventory	24010	118	1
Topic 5: Service Requests	25010	66	.5
Lesson Review	28010	50	.5
Lesson 3: ETAdirect Management Views	30010	74	.5
Topic 1: Time View	31010	446	3
Topic 2: List View	32010	280	2
Topic 3: Map View	33010	482	3
Topic 4: Lower Pane Options	34010	133	1
Lesson Review	38010	71	.5
Assessment	90001	n/a	4
TOTALS	-	3946	30.5
Estimated seat time, including practice & assessment questions:			35-40 minutes

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
00000	**Welcome Video** **Component** Welcome Video **Instructional Event** Gain Attention **Description** Short video to emphasize WIFM	On-camera Talent Script: TBD	**ETAdirect SmartManage Interface Overview**	Synchronized, progressive download MP4 video clip
00001	**Course Splash Screen** **Component** Course Overview **Instructional Event** Gain Attention **Description** Montage and accompanying music	(no script)	**ETAdirect SmartManage Interface Overview**	Reused images

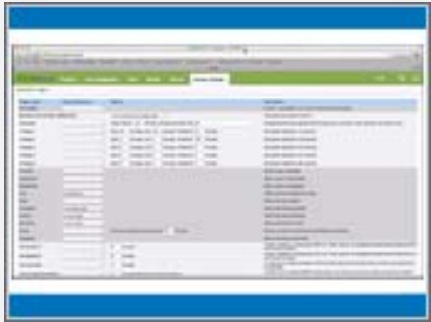| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
00010	**Course Overview** **Component** Course Overview **Instructional Event** Presents the course objectives and WIFM **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** Welcome to the *ETAdirect SmartManage Interface Overview* This course provides an introduction to the layout and general navigation of the ETAdirect SmartManage interface. By the end of this course, you'll be able to... • Navigate the ETAdirect SmartManage interface to find the Mobile Workforce Management information you need. • Describe the primary entities found within the ETAdirect SmartManage interface. • And, view real-time mobile workforce activity within ETAdirect SmartManage. This course takes approximately 35 minutes to complete.	**Course Overview** By the end of this course, you'll be able to... • Navigate ETAdirect SmartManage to find the Mobile Workforce Management information you need. • Describe the primary entities in the ETAdirect SmartManage interface. • View real-time mobile workforce activity within ETAdirect SmartManage.	00010_i1 Collage of photos used in the course

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
10010	**Lesson Intro** **Component** Lesson 1: ETAdirect Resource Tree and Navigation **Instructional Event** Lesson Introduction **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** ETAdirect's SmartManage interface is designed to help you intuitively perform a great number of mobile workforce management tasks. But, in order to do these efficiently, it's important to understand where in the interface to go to find the information that you'd like to work with. For this lesson, let's take a look at some of the different sections that make up the ETAdirect SmartManage interface – and what those sections will allow you to see and do. This lesson covers… • The purpose and structure of the ETAdirect Resource Tree, including groups, buckets and the resources within them • The ETAdirect SmartManage interface menu item options • ETAdirect resource and activity search functions • And, how to set some of your own display preferences.	**ETAdirect Resource Tree and Navigation** In this lesson: • ETAdirect… o Resource Tree o SmartManage interface menu item options o Resource and activity search functions • Setting display preferences	10010_p1 Moblie worker using tablet or laptop with superimposed ETAdirect screen (*See note for 80010_p1 and create these at the same time*) 10010_i2 brief montage of ETAdirect SmartManage screens

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11010	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** The Resource Tree is one of the most important parts of the ETAdirect interface. Some consider it to be the "backbone" of ETAdirect. It shows a hierarchical view of the organization's resources, such as technicians, trucks, tools, and equipment. Resources are organized into what are referred to in ETAdirect as groups and buckets. To view the resources -- or sub-groups or buckets -- within one, you must expand the bucket or group by clicking the plus sign to the left of it. For example, click the plus sign to expand the Florida-USA group.	[Information caption] The Resource Tree shows a hierarchical view of resources, such as technicians, trucks, tools, and equipment. [Prompt caption] Expand the group. [Feedback caption] Click the plus sign (+) to expand FL, USA.	ETAdirect Manage screenshot with Resource Tree partly expanded

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11020	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** When you select a resource, group, or bucket from the Resource Tree, information related to your selection is displayed in the Work Area on the right. The information displayed is based on the ETAdirect <u>menu</u> item you've selected… such as activities. So, the Resource Tree drives "whose" data you'd like to see, and the Menu drives "what" data it will be.	n/a	Demo clicking an individual resource, such as Antonio BARNETTE Highlight the applicable menu item, probably Activities

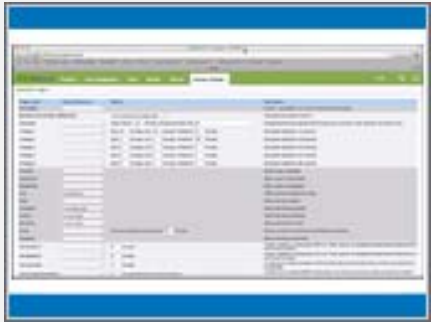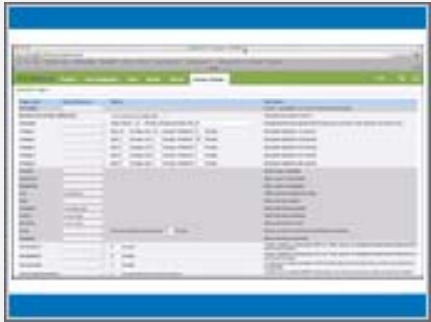| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11030	**Full Screen – Exploratory 1** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** ~~Though we've already alluded to them briefly,~~ lets take a closer look at the three types of items found in the Resource Tree: Groups, Buckets and Resources. Click on each type to learn more about it. Once you're done exploring, click Continue.	**Groups, Buckets & Resources** **Groups** Use groups to sort and organize the other items in the Resource Tree. Groups are typically used to provide a segmentation of an organization in a way that makes it easier for ETAdirect users to find and manage activities and resources. Common examples of groups include, but are not limited to geographic (ie. North, South) or organizational (i.e. department or supervisor's name) differentiations. **Buckets** Buckets provide a couple different operational functions (in addition to segmentation similar to groups) in that they support both routing and quota/capacity management. For routing purposes, buckets serve as repositories for activities from which routing will distribute them among "child" resources. **Resources** Resources typically represent records of the field workforce (technicians, trucks, tools, etc.) who perform the activities and the items that are paired with those people. Resources are often the owners of activities, which are assigned to them based on skills, geographical locations, and their availability to perform them within the associated time windows.	Three types represented by icons and abstract image behind. Content area with text that changes dynamically.

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11040	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** The shapes of the icons in the Resource Tree can be used to differentiate groups and buckets from resources. A double silhouette represents either a bucket or a group. Buckets generally have single numbers to the right of them -- indicating the number of activities currently within them -- while groups have none. A single silhouette represents a mobile employee, resource, truck, or equipment. You'll find two numbers to the right of a resource record, the first indicating the number of scheduled activities that are still pending, and the second indicating the total number of scheduled activities for a given day.	[Information caption] **Double silhouette** - a bucket or group [Information caption] **Single silhouette** - a mobile employee, resource, truck, or equipment	ETAdirect Manage screenshot with highlights and displayed text as needed Close up or enlarged: - Double silhouette - Single silhouette of person, truck, tool

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11050	**Full Screen – Exploratory 1** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** The color of the icon reflects the status of the resource's queue or route. Explore the colors and what they represent. Once you're done exploring, click Continue.	**Icon Colors** **Orange**: Resource has a working calendar but has not activated their route yet, indicating that they cannot yet begin work on their activities (in ETAdirect). **Blue**: Route is activated, indicating the resource is working. **Grey**: Route is deactivated, typically indicating the resource's shift has ended. (For example, the resource finished working for the day, deactivated the route, and went home.) It is important to note that resources can only deactivate their route when there are no pending activities left on it.	11050_p1 Abstract image with top gradient white fill (this is to fill the lower area of the screen, which otherwise will appear empty) Color coded icon examples Content area with text that changes dynamically.

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11060	**Full Screen Image & Bullet Text** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** Information presentation **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** The degree to which an icon is filled represents the resource's workload for the day: • One-third filled indicates the resource has a low workload, or none at all. • One-half to two-thirds means the resource has an average workload. • And a solid icon means the resource is at or above the full workload threshold. The specifics for what constitutes the third, half, and full icon fill levels, as well as how they are measured (i.e. number of activities, number of hours, time percent) are configured under Company Settings | Resource Types in ETAdirect.	**Icon Fill Levels** • 1/3 - Low workload or none • 1/2 to 2/3 - Average workload • Solid - At or above full workload threshold NOTE: Specify what constitutes icon fill levels under Company Settings | Resource Types.	Reuse 11050_p1 Icon examples with the three fill levels

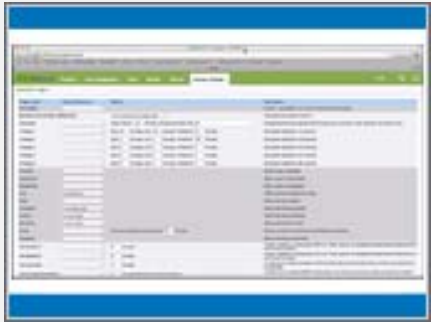| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11065	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** The Resource Tree also contains a filter option that allows you to hide or view resources based on their schedule or queue/route status. This provides a means to populate the Tree with only those resources that you need to view. The filters are turned on or off by clicking on the checkmark areas to the left of these options: • Inactive Resources • Resources with Non-Working Day • Resources with not activated queues • Resources with activated queues • And, Resources with completed --or deactivated -- queues	**n/a**	Demo selecting a filter from the filter dropdown list.

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11070	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** For quick, "at a glance," information about a group, bucket, or resource, hover your cursor over – or click on - its icon to display a hint box. These hint boxes commonly display key information, such as… • Alerts, such as routes not activated in time, activities losing service windows, and technicians that have "stopped reporting" – That is, their ETAs have passed with no status updates. • Configurable data about the resource, group or bucket, such as name and phone number. • Configurable actions, such as Activate Route, Start, Complete activities, etc. You must actually click on the Resource Tree icon in order to view action links within a hint box. • And additional links to show lists of scheduled or non-scheduled activities.	[Semi-transparent text box overlay] **Hint Box** • Alerts (not activated in time; losing service window; stopped reporting) • Configurable data about the resource, group or bucket (name, phone number, etc.) • Configurable actions (Activate Route, Start, Complete activities, etc.) o Click the Resource Tree icon to view action links within a hint box • Additional links to show lists of scheduled or non-scheduled activities	Demo clicking icon and displaying hint box (Either find a hint box with all four examples and highlight each, or fade through multiple examples, or include a semi-transparent text box with bullet points)

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11080	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** You can quickly find a resource by entering the resource name or ID in the Search field just above the Resource Tree. All matching records in the Resource Tree are returned. You can enter a partial word or value. However, the more characters, the more narrow the results.	n/a	ETAdirect Manage screenshot with resource tree collapsed Demo a search for Lynch, entering one letter at a time.

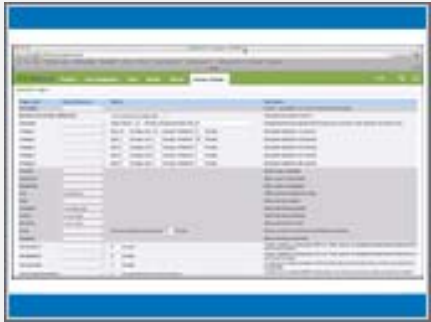| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11090	**Question – Multiple Choice** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	**Question 1 of 2** Which icon represents an activated (working) resource with an average workload? (Select the best option, and then click **Submit**.) A) [Yellow & 1/3 filled bucket or group icon] B) [Grey & 1/2 to 2/3 filled truck icon] C) [Blue & 1/2 to 2/3 filled mobile employee icon] (correct) D) [Yellow & solid filled equipment icon] E) [Blue & filled bucket or group icon] [Incorrect Feedback] Incorrect. The correct answer is C.	See question answer choices for graphic requirements

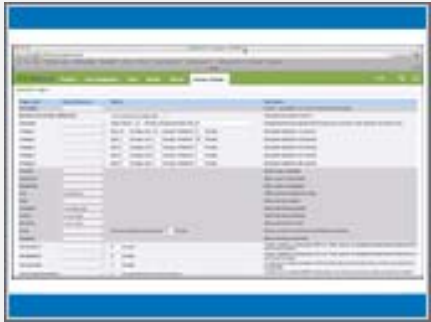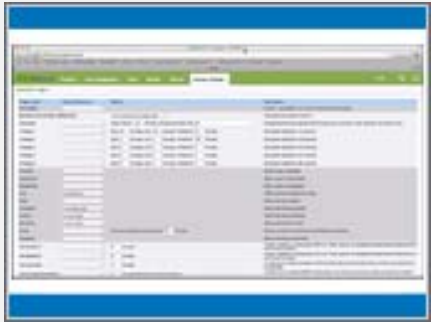| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
11100	**Question – Multiple Choice** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 1: Using the Resource Tree **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	**Question 2 of 2** Which Resource Tree item serves as a repository for activities to be routed from, and is also used to support quota/capacity management? (Select the best option, and then click **Submit**.) A) Group B) Bucket (correct) C) Resource D) Hint Box [Incorrect Feedback] Incorrect. The correct answer is Bucket.	ETAdirect screen with expanded resource tree Show collapsed version of Resource tree as part of correct feedback.

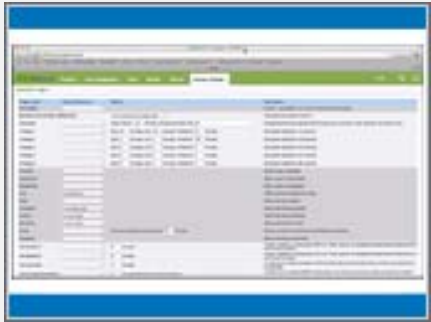| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12010	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** In addition to the Resource Tree and the Work Area, the ETAdirect SmartManage interface includes a set of menu tabs across the top. The menu tabs and the options found within them can be configured in different ways, depending on an organization's needs and user preferences. So the menu tabs on your version may look different than the ones shown here, but they'll still function the same by populating the work area with information relevant to the selection.	[Information caption] Menu tabs populate the work area with information relevant to the selection.	ETAdirect Manage screenshot; highlight row of menu tabs

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12020	**Full Screen – Exploratory Screenshot** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** Click each menu tab to learn more about it, again keeping in mind that these can be configured differently as needed or preferred. Once you're done exploring, click Continue.	**Segment Title** **Activities** Shows the activities for the resource selected in the Resource Tree. Most dispatcher daily tasks are accomplished in this tab. **Dashboard** Shows a configurable dashboard, which contains graphical displays of report results. **Daily** Displays calendars, which can include shifts/schedules, points, routes, and zones for a resource or group of resources for one week. **Forecasting** Shows a tool used for analyzing historical data and forecasting future workloads for capacity and resource planning. **Quota** Displays features used to set up and manage quota. **Routing** Displays features used to associate routing plans with buckets, and view routing results. **Tools** Several system administration options including the ability to access data and log files. **Resource Settings** Displays features that are associated with resources such as associated users, viewing a resource's attributes work skills, work zones, calendars and locations, and viewing resource-oriented inventory. **Reports** Displays predefined reports that present information about your mobile workforce. <mark>Continued on next screen</mark>	Content area with text that changes dynamically.
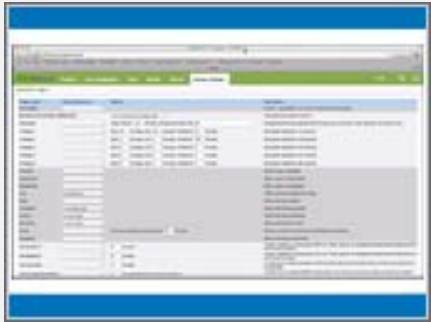
Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
			Company Settings Displays the main configuration areas for ETAdirect. (Some of the screens in this area are only used by TOA Support Representatives to configure the environment.)	

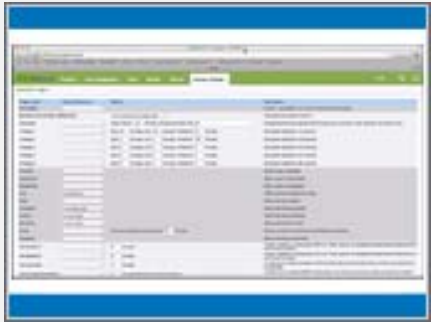| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12030	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Activities represent the work that resources complete over the course of their days. As with the ability to search for resources via the Resource Tree, ETAdirect also has a search function for finding specific activities. To search for an activity, click the magnifying glass in the upper right area of the interface to open the Activity Search box.	[Prompt caption] Click the magnifying glass. [Feedback caption] Click the magnifying glass to open the Activity Search box.	ETAdirect Manage screenshot

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12040	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Now click the wrench icon to see which attributes of an activity you can search by.	[Prompt caption] Click the wrench icon. [Feedback caption] Click the wrench icon to see the search attributes.	ETAdirect Manage screenshot

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12050	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** The checked attributes are the ones that you can enter text to search by. Understand that searchable fields like these must be configured to reflect an organization's business needs. From this same window, you can drag and drop the searchable fields into a preferred priority, and you can also specify the date range that you'd like the search results to pull from.	[Information caption] Searchable fields must be configured to reflect an organization's business needs.	~~Demo drag and drop and entering date range.~~

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12060	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Now click **Back to Search** to return to the Activity Search box.	[Prompt caption] Click **Back to Search**. [Feedback caption] Click **Back to Search** to return to the Activity Search box.	ETAdirect Manage screenshot

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12070	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** From here you would enter text…either a word or number…to look up an activity. You can enter a partial word or value, but here you must enter at least three characters. As you enter more characters, you'll see the results narrow.	[Information caption] Requires at least three characters.	Demo search functionality

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12080	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** ETAdirect drives collaboration, allowing dispatch centers and field staff to share information in real-time. SmartCollaboration is a module that dynamically and automatically connects users, facilitating communication and the exchange of activity and resource information, all via a chat window. Accessed by clicking the "chat icon" in the upper-right area… SmartCollaboration empowers the field to quickly take action and solve issues… such as exchanging inventory, or moving activities within the context of communication, as opposed to as standalone tasks in ETAdirect.	[Information caption] SmartCollaboration dynamically and automatically connects all users based on a variety of contextual parameters, including location, work type, and skill.	Demo clicking the "chat icon"

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
12090	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 2: Exploring the Interface **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Within the ETAdirect SmartManage interface, users also have the ability to set a few preferences as to how it should display specifically to them. To set these ETAdirect preferences… including layout options and password changes… click your user name in the upper-right area to access a dropdown menu. Of course, the user name in this demonstration is different than the one you'll see when you're logged into ETAdirect.	[Information caption] To configure ETAdirect preferences, click your user name to access a dropdown menu.	Demo clicking user name in the upper-right area to access the Login Drop Down menu

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
13010	**Full Screen – Demo or Simulation** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 3: Setting My Display Options **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** The My Display area is related to your specific user experience in ETAdirect… meaning that you can modify some settings that affect how certain elements of the interface will display to you -- and changes to these have no effect on other users. These options provide some key benefits, especially for clients whose business spans multiple time zones… or requires the support of different languages.	[Information caption] Modifying My Display settings has no effect on other users.	ETAdirect Manage interface screenshot with standard settings Highlight My Display Fade in second screenshot with different color theme Fade in third screenshot with different color theme and language Demo accessing My Display Settings

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
13020	**Full Screen – Exploratory 1** **Component** Lesson 1: ETAdirect Resource Tree and Navigation Topic 3: Setting My Display Options **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching) [Alternate option] **Full Screen – Exploratory Screenshot** **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** Shown here are the fields that appear under My Display – some of which are read-only, and others can be modified. Keep in mind that these fields can vary by user profile, so yours may be different than the ones shown here. Click each field to learn more about it. Once you are done exploring, click Continue. [Alternate recording for additional programming option] Shown here are the fields that appear under My Display – some of which are read-only, and others can be modified. Keep in mind that these fields can vary by user profile, so yours may be different than the ones shown here. Place your cursor over each field to learn more about it. Once you're done exploring, click Continue.	**Main Fields in My Display** **Login Information** **User name** - This represents the actual name of the user logged in. It is NOT the login name used to access ETAdirect. **Registered** - The date that this user record was created in ETAdirect. **Last login** – The date and time of this user's last login to ETAdirect. **Last password change** – The date and time of this user's most recent password change. **User Attributes** **Display profile** - The highly-configurable set of screens/contexts within ETAdirect that determine what information should be displayed to the user and how it should be formatted. **Time zone** - Defines the date to be selected when the user logs into ETAdirect. **Language** - This option contains a list of languages supported in ETAdirect for the client. When the user selects a language, all aspects of the interface that have been translated via glossary and property entries will display to the user. **Time format** - Here the user can choose how they prefer to view times - either by the 24-hour clock or 12-hour (AM/PM) clock. These times appear throughout ETAdirect (activity records, Time view/GANTT chart, etc.). **Date format** - This option allows the user to specify how they prefer MDY dates to appear throughout ETAdirect (within hints, messages, dashboard reports, etc.). [Continued next row]	

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
			Long date format - This allows the user to modify the way the long date appears on the calendar bar in ETAdirect. **Week start** - This setting allows the user to specify which day of the week should be the start within the Daily menu view. **Other** **Refresh rate** - This represents the time (in whole number minutes) that information displayed in ETAdirect (List/Map/Time views) should be automatically refreshed. "0" indicates that the auto-refresh is Off. Take care not to set this to too frequent refreshes, as it can impact overall interface performance. **Show placeholder ID** - With this turned on, numerical IDs will appear in front of glossary items, providing a more efficient way of editing verbiage in ETAdirect. **Default export format** - Certain data can be exported from ETAdirect in either .csv, .mxl or .xlsx format. This option permits the user to specify their default export format preference. Regardless of the default selection, the other options are available when performing an export. **Design theme** - This option allows the user to specify the background color of the main menu of ETAdirect - either the standard green, dark grey or white.	

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
13030	**Question – Multiple Choice** **Component** Lesson 1: ETAdirect Resource Tree and Navigation **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	Which ETAdirect Menu Tab displays features that are associated with resources, such as associated users, viewing a resource's attributes, work skills, work zones, calendars and locations, and viewing resource-oriented inventory? (Select the best option, and then click Submit.) A) Activities B) Daily C) Routing D) Dashboard E) Resource Settings (correct) [Incorrect Feedback] Incorrect. The Resource Settings tab displays features that are associated with resources.	
13040	**Question – Hotspot** **Component** Lesson 1: ETAdirect Resource Tree and Navigation **Instructional Event** Practice question **Description** Learner answers the question by clicking the correct area of the screen	(no script)	**Question 2 of 2** Open the Activity Search feature on the screen shown below. (Click the correct area of the screen.) [Incorrect Feedback] Incorrect. The Activity Search feature is accessed by clicking the magnifying glass in the upper-right area.	ETAdirect screen

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)

18010	**Lesson Conclusion**
	
	Component
	Lesson 3: ETAdirect Resource Tree and Navigation
	
	Instructional Event
	Key concept review
	
	Description
	Recap of key points & topics
		Narrator:
		
		The ETAdirect SmartManage interface was designed with managers and dispatchers in mind, in order to continuously and efficiently track and manage all field personnel, individually and collectively.
		
		This lesson covered…
		
		• The purpose and structure of the ETAdirect Resource Tree, including groups, buckets and the resources within them.
		
		• The ETAdirect SmartManage interface menu item options
		
		• ETAdirect resource and activity search functions
		
		• And, how to set some of your own display preferences.
			Lesson Review:
			ETAdirect Resource tree and Navigation
			
			In this lesson, you learned about…
			
			• ETAdirect…
			
			   o Resource Tree
			
			   o SmartManage interface menu item options
			
			   o Resource and activity search functions
			
			• Setting display preferences
				80010_p1
				Moblie worker using tablet or laptop with superimposed ETAdirect screen (**Original graphic**; *do not reuse 10010_p1*)
				
				Re-use 10010_i2

20010	**Lesson Intro**
	
	Component
	Lesson 2: ETAdirect Entity Types
	
	Instructional Event
	Lesson Introduction
	
	Description
	Images synchronized with text bullets and voiceover audio
		Narrator:
		
		What do resources, users, activities and inventory have in common? They're all mobile workforce entities that you'll find in ETAdirect.
		
		ETAdirect provides not only the means to manage these entities, but also the ability to configure them in ways to support various business rules or requirements.
		
		This lesson introduces you to these four entities and some of their characteristics, which allow for a wide range of use and interaction within the system.
		
		While this is meant as an overview of these concepts, follow-on courses will go into much greater depth regarding specific configurations of each entity type.
		
		Also in this lesson, we'll cover Service Requests, which are flexible actions initiated <u>by</u> users, that also support special requests <u>from</u> users.
			ETAdirect Entity Types
			
			In this lesson:
			
			• ETAdirect Entity Types:
			
			   o Resources
			
			   o Users
			
			   o Activities
			
			   o Inventory
			
			• Service Requests
				20010_i1
				4-part collage build with 1 text labeled image for each entity
				- Resource
				- User
				- Activity
				- Inventory
				
				(*No need to try to represent service requests at this point.*)

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
21010	**Three-quarter Screen Image & Bullet Text** **Component** Lesson 2: ETAdirect Entity Types Topic 1: Resources **Instructional Event** Information presentation **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** The first entity we'll cover is a Resource – typically one that provides services on behalf of the company. You might hear a resource also commonly referred to as a "field worker" or a "technician"…just as a couple examples. A resource is usually an individual, but it can also be a piece of equipment, or a vehicle.	**Entity Type: Resource** • Entities that provide services on behalf of the company • Usually an individual, but also equipment or a vehicle	21010_i1 (modified 20010) Three-part collage of person (largest part), and equipment and vehicle (smaller parts)

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
21020	**Full Screen – Exploratory Rollover** **Component** Lesson 2: ETAdirect Entity Types Topic 1: Resources **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** Some examples of the functions and characteristics associated with resources within ETAdirect include… • Resource Types • Locations • Work Zones • Work Skills • Calendars • Inventory • And Teamwork The idea here -- and for the other entity descriptions in this lesson -- is to familiarize you with some of the ways that resources can be defined or differentiated in ETAdirect, and the terminology associated with each. Place your cursor over each function or characteristic to learn more about it. Once you're done exploring, click Continue.	**Functions or Characteristics Associated with Resources** **Resource Types** Features and settings allow for cost and functionality differences between different types of resources (e.g., contractors vs. in-house, for example). **Locations** Resolved (i.e., geo-coded) locations for where resources start or end their days can be entered, resulting in increased routing efficiency. **Work Zones** These define the areas within which a resource is allowed or available for work during a specific or ongoing period of time. **Work Skills** These define the abilities or certifications that resources have that either qualify or disqualify them from being assigned certain activities. **Calendars** These are used to set and manage the days and timeframes within which resources are available for work. **Inventory** This option is used to specify the equipment that a resource has possession of, either to install at a job site or that they have removed from a job site. **Teamwork** This option supports the case where more than one resource is required to perform certain activities.	Rollover text reveal for each term

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)

22010	**Three-quarter Screen Image & Bullet Text**
	
	Component
	Lesson 2: ETAdirect Entity Types
	Topic 2: Users
	
	Instructional Event
	Information presentation
	
	Description
	Images synchronized with text bullets and voiceover audio
		Narrator:
		
		The next entity type – a User – represents an individual or system that requires access – in the form of a login and password – to ETAdirect.
		
		Common users can include…
		
		• Dispatchers
		
		• System administrators
		
		• Routing managers
		
		• And Technicians – who, by the way, are also typically linked to a resource record
		
		In addition, there are non-human users, such as a SOAP user – which fulfills authentication requirements for transferring data between systems.
			Entity Type: Users
			
			• An individual or software / system that accesses ETAdirect:
			
			   o Dispatchers
			
			   o System administrators
			
			   o Routing managers
			
			   o Technicians (also linked to a resource record)
			
			• Non-human users, such as a SOAP (Simple Object Access Protocol) user
				22010_i1 (modified 20010) Collage showing 2-3 dispatcher or system admins and an abstract representation of SOAP, such as data transfer

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
22020	**Full Screen – Exploratory Rollover** **Component** Lesson 2: ETAdirect Entity Types Topic 2: Users **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** Examples of functions and characteristics associated with users within ETAdirect include… • Profiles and Permissions • Display Profiles • Login Polices • Self Assignment • Time and Language Preferences • SmartCollaboration User Groups and Helpdesks • API Configuration • And Links to Resources Place your cursor over each function or characteristic to learn more about it. Once you're done exploring, click Continue.	**Functions or Characteristics Associated with Users** **Profiles/Permissions** These define the roles that can be assigned to users – what the user is allowed to see and do within ETAdirect. **Display Profiles** A set of ETAdirect screens that can be configured in ways that make sense to certain users, defining the fields that should be visible and editable to the user. **Login Policies** Corporate login security standards can be defined in ETAdirect; LDAP is an option as well. **Self Assignment** This option permits a user to select certain available activities and assign them to his or her own route. **Time/Language Preferences** These options permit users to view information in ETAdirect in their native language and time zone. **SmartCollaboration User Groups and Helpdesks** These are user-oriented features that enable more efficient management, communication and support within the SmartCollaboration module. **API Configuration** (new in 4.5) This represents a section of ETAdirect for managing user profiles and permissions specifically associated with API (web services) authentication and processing. **Links to Resources** For users that also have resource records – the ability to log in (user) and perform actions on assigned activities (resource)	Rollover text reveal for each term

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
23010	**Three-quarter Screen Image & Bullet Text** **Component** Lesson 2: ETAdirect Entity Types Topic 3: Activities **Instructional Event** Information presentation **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** The next entity type to discuss is an Activity. An activity is a task – such as a work order, job, or ticket – that is worked on and eventually completed by a resource. Activities are commonly routed to resources – either automatically by ETAdirect, or manually by a user – based on a number of configured variables. Activities are measured in time increments, ultimately feeding into a statistics engine, which in turn produces Performance Pattern Profiles. A portion of these Performance Pattern Profiles are then used to provide estimations for future activity durations.	**Entity Type: Activities** • Tasks completed by a resource (work order, job, ticket, etc.) • Commonly routed to resources based on a number of configured variables • Measured in time increments: o Fed into Performance Pattern Profiles (statistics used to provide estimations of future activity durations)	23010_i1 (modified 20010) Feature an activity being performed

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
23020	**Full Screen – Exploratory Rollover** **Component** Lesson 2: ETAdirect Entity Types Topic 3: Activities **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** Examples of some of the functions and characteristics associated with activities within ETAdirect include… • Activity Types • Inventory • Linked Activities • Work Skills / Conditions • Work Zones • Ordered / Not-Ordered Activities • Scheduled / Non-Scheduled Activities • Time Slots, Service Windows, SLAs • Repeating Activities • Mass Activities • Prework • And SmartCollaboration Place your cursor over each function or characteristic to learn more about it. Once you're done exploring, click Continue. [Alternate recording for additional programming option] Examples of functions and characteristics associated with activities within ETAdirect include those shown here. Place your cursor over each function or characteristic to learn more about it. Once you're done exploring, click Continue.	**Functions or Characteristics Associated with Activities** **Activity Types** Features and settings that determine how ETAdirect will process each different type of activity. **Inventory** This option represents equipment that is at the job site/residence, or equipment that has been de-installed. **Linked Activities** Relationships between activities based on date, timing or resource assignments can be established; these relationships help determine how and when they will be routed by ETAdirect. **Work Skills/Conditions** Based on attributes of activities, these define the skills/abilities/certifications required to perform the work. **Work Zones** These define the areas within which the job site or residence of the activities are. **Ordered/Not-Ordered Activities** These options allow for the specification of whether activities must be done in a particular sequence or not. **Scheduled/Non-Scheduled Activities** These options allow for the specification of whether activities must be done on a given day or not. **Time Slots, Service Windows, SLAs** These represent windows within which the activity must be started (SW) or completed (SLA). **Repeating Activities** This option is commonly used for efficiently creating recurring activities (ex. team meetings, breaks, etc.). *(Continued next row)*	Rollover text reveal for each term

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
			Mass Activities This option is commonly used for efficiently creating activities that are applicable for multiple resources (ex. meetings, trainings, etc.) **Prework** This option can account for a resource's time spent preparing for a specific activity, regardless of the order of the activity on a route (ex. running jumpers in the morning prior to working at the job site). **SmartCollaboration** Via the feature that permits chat-like communication between users, activities can be dropped into the window, and if accepted by the recipient, can automatically be moved.	

24010	**Three-quarter Screen Image & Bullet Text**
	
	Component
	Lesson 2: ETAdirect Entity Types
	Topic 4: Inventory
	
	Instructional Event
	Information presentation
	
	Description
	Images synchronized with text bullets and voiceover audio
		Narrator:
		
		The fourth entity type, inventory, refers to equipment – serial numbered or not – that is associated with an activity or a resource, and is either installed or de-installed when performing an activity.
		
		ETAdirect tracks the actions associated with inventory. It can also route activities based on required and available inventory.
		
		However, ETAdirect is <u>not</u> a system of record for inventory. Details about the inventory-related actions are typically sent back to the client system for maintenance.
			Entity Type: Inventory
			
			• Equipment associated with an activity or a resource
			
			• May or may not be serial numbered
			
			• Installed or de-installed when performing an activity
			
			• ETAdirect…
			  o Tracks the actions associated with inventory
			  o Can route activities based on required and available inventory
			
			NOTE: ETAdirect is <u>not</u> a system of record for inventory.
				24010_i1 (modified 20010) Feature equipment being installed

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
24020	**Full Screen – Exploratory Rollover** **Component** Lesson 2: ETAdirect Entity Types Topic 4: Inventory **Instructional Event** Exploratory **Description** Learner-driven, text only exploratory (non-branching)	**Narrator:** Examples of functions and characteristics associated with inventory within ETAdirect include… • Inventory Types • Associated with Activities • Associated with Resources • Support of Actions • SmartCollaboration • Required Inventory • Routing by Inventory Place your cursor over each function or characteristic to learn more about it. Once you're done exploring, click Continue.	**Functions or Characteristics Associated with Inventory** **Inventory Types** Features and settings that determine how ETAdirect will process inventory. **Associated with Activities** This option represents equipment that is at the job site/residence, or equipment that has been de-installed. **Associated with Resources** This option is used to specify the equipment that a resource has possession of, either to install at a job site or that they've removed from a job site. **Support of Actions** Functions that can be performed on inventory – such as install, de-install, move, and exchange – typically resulting in the client system of record being updated appropriately. **SmartCollaboration** Via the chat-like communication feature in ETAdirect, inventory can be shared and moved between resources. **Required Inventory** This feature is used to define the inventory needed to successfully perform the work. **Routing by Inventory** ETAdirect routing can make activity assignment decisions based on certain equipment being required to perform a specific activity.	Rollover text reveal for each term

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
25010	**Three-quarter Screen Image & Bullet Text** **Component** Lesson 2: ETAdirect Entity Types Topic 5: Service Requests **Instructional Event** Information presentation **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** In addition to the four entity types, ETAdirect allows for Service Requests, which are flexible actions initiated by and supporting special requests from users. Service requests can be used in conjunction with activities, inventory, and resources. They're configured via the manual message trigger, where actionable information is sent to another system for support. Some examples of service requests include line tests, upsell opportunities, and send forms.	**Service Requests** • Flexible actions initiated by and supporting special requests from users • Can be used in conjunction with activities, inventory and resources • Tied into manual message trigger (Outbound) • Examples: line tests, upsell opportunities, send forms	worker using a mobile device, as that is where SRs are typically originated.
25020	**Question – Multiple Choice** **Component** Lesson 2: ETAdirect Entity Types **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	**Question 1 of 2** Which entity type typically provides services on behalf of the company, is often an individual, but can also be a piece of equipment, or a vehicle? (Select the best option, and then click **Submit**.) A) Resource (correct) B) User C) Activity D) Inventory [Incorrect Feedback] Incorrect. The correct answer is Resource.	

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
25030	**Question – Multiple Choice** **Component** Lesson 2: ETAdirect Entity Types **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	**Question 2of 2** Which entity type is a task completed by a resource, such as a work order, job, or ticket? (Select the best option, and then click **Submit**.) A) Resource B) User C) Activity (correct) D) Inventory [Incorrect Feedback] Incorrect. The correct answer is Activity.	

28010	**Lesson Conclusion**
	
	Component
	Lesson 3: ETAdirect Resource Tree and Navigation
	
	Instructional Event
	Key concept review
	
	Description
	Recap of key points & topics
		Narrator:
		
		Resources, users, activities, and inventory are entities that play key roles in mobile workforce operations.
		
		This lesson introduced you to these entities, and provided some examples of how they can be used and managed within ETAdirect. As previously mentioned, additional courses will dive deeper into the specific configuration aspects of each entity.
		
		This lesson also introduced you to service requests.
			Lesson Review:
			ETAdirect Resource tree and Navigation
			
			In this lesson, you learned about
			
			- ETAdirect entities:
			  o Resources
			  o Users
			  o Activities
			  o Inventory
			- Service Requests
				28010_p1 Collage of the four entities.

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
30010	**Lesson Intro** **Component** <mark>Lesson 3: ETAdirect Management Views</mark> **Instructional Event** Lesson Introduction **Description** Images synchronized with text bullets and voiceover audio	**Narrator:** ETAdirect provides complete visibility into field operations as they unfold in real time – for the workforce as a whole, or for teams or individuals. Multiple views within the ETAdirect SmartManage interface allow you to identify – at a glance – where resources are, what their routes look like, and the current statuses of their assigned activities. In this lesson, we'll explore three ways to view this information: • Time View • List View • And Map View	**ETAdirect Management Views** In this lesson: • Time View • List View • Map View	30010_a1 Collage that builds with photos of field operations (individuals and teams) 30010_i2-4 Miniature ETAdirect screen shots of each view – builds in layers

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
31010	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 1: Time View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Time View provides an instant picture of the day in real time – of all routes at once, if a bucket or groups is selected from the Resource Tree. Think of it as an "Air Traffic Control" view of the field – a view commonly preferred by dispatchers and managers. Time View displays the activities for the resource, group, or bucket selected in the Resource Tree via progressive timelines in a Gantt chart, where the activities are represented as blocks of time. Each activity is color coded based on its current status.	[Semi-transparent text box overlay] **Time View** • Provides an instant picture of the day. • Displays the activities for the selected resource, group, or bucket. • Shows progressive timelines in a Gantt chart. • Activities represented as blocks of time, and color-coded by their statuses.	ETAdirect Manage screenshot with Time View Work Area Highlights per script

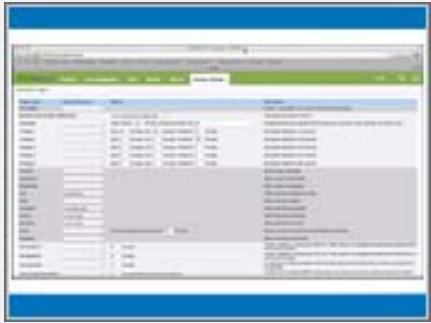| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
31020	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 1: Time View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** ~~In Time View…~~ • The Time Scale shows the distribution of time and activities over the hours of the workday. • The red vertical dotted line represents the Current Time. You can move your cursor along the time scale to identify specific times that an activity started or ended. • Notice the orange triangles at the beginning of each shift. These represent the actual times that the resources activated their routes. Once routes are deactivated, inverse triangles representing those times appear to the right of the routes. • The size of an activity block represents the estimated time it will take the technician to perform the work based on his or her Performance Pattern Profile. • The color of the activity block indicates the status of the work. • Grey blocks at the beginning and end of each route represent Off Time based on the hours set in the resource's calendar. • And numbers to the far right of the rows are indicators of the number of Not Ordered and Non-scheduled activities assigned to the resource.	n/a	ETAdirect Manage screenshot with Time View Work Area Highlights and demos per script

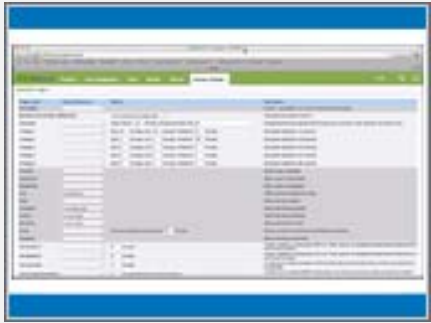| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
31030	**Full Screen Demo** **Component** Lesson 3: ETAdirect Management Views Topic 1: Time View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	The View button offers some additional functionality to further enhance a user's experience in Time view. You'll find a list of data-driven filters under the View button. Filters allow you to hone what displays in the Work Area based on attributes of the activities or resources that are important to you. Also, if you've selected a group or bucket from the Resource Tree, you'll likely want to check the Apply Hierarchically checkbox to see all child records on the Gantt chart.		Demos and highlights per script

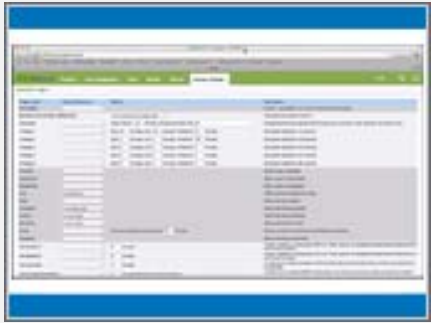| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
31040	**Full Screen Demo** **Component** Lesson 3: ETAdirect Management Views Topic 1: Time View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	The Show Not Working checkbox allows one to see ALL resources, including those not currently scheduled for work on the selected day. For those clients using SmartLocation, the Show Resource Trace checkbox enables another line under the resource's route that is used to indicate compliance with his or her expected route. Colors other than blue indicate unexpected idle time along the route, or deviation from the expected activity location.		Demos and highlights per script Possibly overlay a screen capture or partial screen to illustrate the "… line under the resource's route that is used to indicate compliance with their expected route"

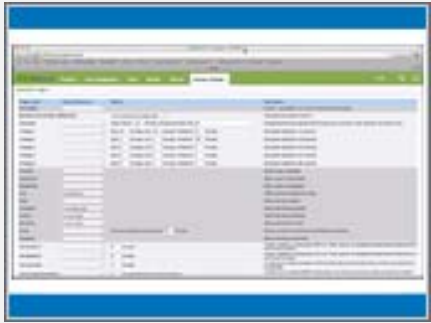| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
31050	**Full Screen Demo** **Component** Lesson 3: ETAdirect Management Views Topic 1: Time View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	Finally, you can use the slider under the View button to zoom in and out of Time View. Clicking Fit centers the activities in the chart. To open an activity from Time View, simply double-click it.		Demos and highlights per script

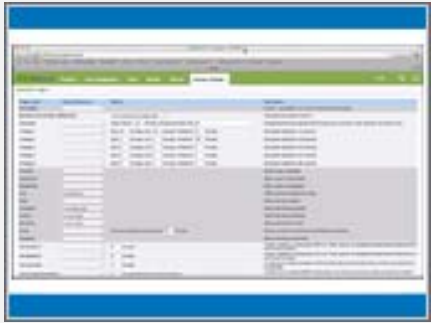| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
31060	**Question – Multiple Choice** ![Knowledge Check screenshot] **Component** Lesson 3: ETAdirect Management Views Topic 1: Time View **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	What makes Time View ideal for Dispatchers and Managers? (Select the best option, and then click **Submit**.) A) It can display multiple routes in one view, depending on what is selected from the Resource Tree. (correct) B) It only shows a detailed view of one route at a time. C) It provides a quick view of a resource's schedule for the day, the week, and the month. D) It makes it easy to see the most ideal driving directions that a resource should follow. [Incorrect Feedback] Incorrect. Dispatchers and Managers often use Time View because it can display multiple routes in one view -- their entire field workforce, updated in real time.	

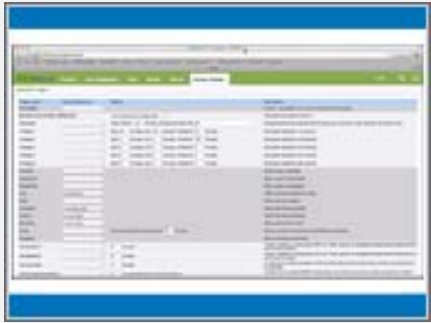| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
32010	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 2: List View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** List View is a by-resource, chronological list of the specified day's activities based on the estimated start times. It displays all of the activities for the selected resource, group or bucket, including those that are not ordered. The data columns that display in List View are configurable as per a company's requirements, and commonly display high-level critical attributes of the activities, such as estimated start and end times, activity types, and custom information. Similar to Time View, if you've selected a group or bucket from the Resource Tree in List View, you'll likely want to check the Apply Hierarchically checkbox from within the View button to see all child resource records within the list.	[Semi-transparent text box overlay] **List View** • Shows a chronological list of the day's activities • Displays all activities for the selected resource, group or bucket • Provides a look into some of the important attributes of activities.	ETAdirect Manage screenshot with List View Work Area Highlights per script

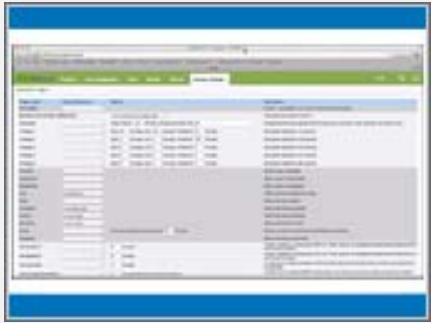| Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
32015	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 2: List View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Another feature of List view is the ability to view either… • Scheduled activities – those with dates • Or non-scheduled ones – those without dates Simply click on the date immediately above the list of activities… and choose the "Non-Scheduled" button to see the non-scheduled activities. Click the "Scheduled" button and the date to get back to the default list of scheduled activities.	n/a	ETAdirect Manage screenshot with List View Work Area Demo per script

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
32020	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 2: List View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** List view columns can also be adjusted by the user. This can be done by clicking on the "wrench" icon to the right of the view, and subsequently turning on or off columns from view, as well as dragging and dropping them into the preferred viewing order. [Activity in lieu of practice question] Let's try it. While in List view, click the wrench icon to display the Grid Preferences.	[Information caption] Customize List View by rearranging and showing or hiding columns. [Prompt caption] Click the wrench icon. [Feedback caption] Click the wrench icon to display Grid Preferences.	ETAdirect Manage screenshot with List View Work Area

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
32030	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 2: List View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** From here you can choose to… • Show or hide columns • Rearrange the order • And disable word wrapping in individual columns For this exercise, hide the Information column.	[Prompt caption] Hide the **Information** column. [Feedback caption] Click the checkbox to deselect the **Information** Column.	

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
32040	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 2: List View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Now click the wrench icon again to close the Grid Preferences window.	[Prompt caption] Close the Grid Preferences window. [Feedback caption] Click the wrench icon.	

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33010	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** To see a resource's activities plotted on a map, choose Map View. Map view is useful when you want to see the activities in relation to an actual route. It shows the distribution of the activities within the geographical region and can help you picture how the resource will get to each of the activities. Activities for the selected group, bucket or resource appear on the map in the center of the screen and in a list on the right, both of which launch activity hint boxes when clicked. One important thing to understand about Map View is that the map itself is provided by the free Google Maps web service, and activities are plotted on it using coordinates obtained by the Google Geocoding API paid service.	[Semi-transparent text box overlay] **Map View** • Shows the day's activities charted on a map • Illustrates how resources will get to activities. • Includes a list of the activities. NOTE: Maps provided by free Google Maps web service, and coordinates by Google Geocoding API paid service	ETAdirect Manage screenshot with Map View Work Area Highlights per script

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33020	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Clicking the View button while in Map view displays a window with additional filter and view options. Similar to the other views, you can apply a filter to limit the number of activities displayed in the Map view.	n/a	Demo clicking view button in Map View and displaying filter and view options window

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33030	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** When viewing an individual resource in Map View, you can see his or her driving directions, and if using SmartLocation or the GPS API, the resource location on the map, nearby resources, as well as the provider trace. [Activity in lieu of practice question] For example, let's view driving directions. First, select a resource from the Resource Tree. For this exercise, click Billy Holm.	[Prompt caption] Click **Billy HOLM**. [Feedback caption] Click **Billy HOLM** to select this resource from the Resource Tree.	Highlights per script, 1st paragraph

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
~~33040~~	~~**Full Screen – Demo or Simulation**~~ ~~**Component**~~ ~~Lesson 3: ETAdirect Management Views~~ ~~Topic 3: Map View~~ ~~**Instructional Event**~~ ~~System demonstration or interactive simulation~~ ~~**Description**~~ ~~Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio~~	~~**Narrator:**~~ ~~Next, click Map View.~~	~~[Prompt caption]~~ ~~Click **Map View**.~~ ~~[Feedback caption]~~ ~~Click Map View to see Billy HOLM's activities charted on a map and listed chronologically.~~	~~ETAdirect Manage screenshot~~
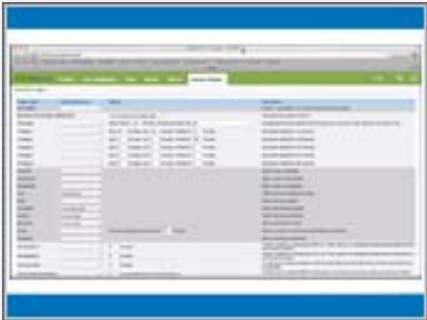
Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33050	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** ~~Now we see Billy's route, and a list of his activities for the day.~~ Next, click the View button.	[Prompt caption] Click **View**. [Feedback caption] Click the **View** button to display additional options.	ETAdirect Manage screenshot
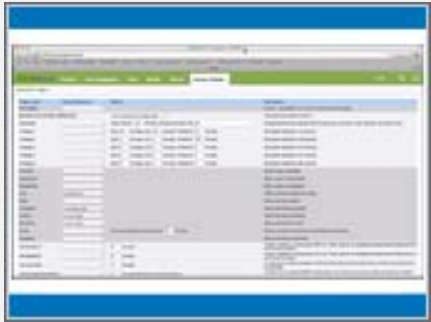
Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33060	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Select the Show Driving Directions checkbox.	[Prompt caption] Select **Show Driving Directions**. [Feedback caption] Click the **Show Driving Directions** checkbox to select it.	ETAdirect Manage screenshot

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33070	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Now apply the change to show driving directions in Map View.	[Prompt caption] Apply the change. [Feedback caption] Click **Apply** to show driving directions in Map View.	ETAdirect Manage screenshot

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33075	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Well done. The system now displays the suggested driving directions for Billy's route.	n/a	ETAdirect Manage screenshot

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33080	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** From the View button, you can also click "Show Resource Trace"… and the map will display dots – commonly referred to as a "breadcrumb trail" – that indicate specific time stamped geo-coordinates of the resource's path. These coordinates can be obtained from the Mobility device itself using telemetry, or they can be sent to ETAdirect via an external GPS system using the GPS API.	n/a	Demo Show Provider Trace

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
33090	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 3: Map View **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Keep these points in mind when using Map View: The default view of the route displayed in the Map View is not a driving route using actual streets, but a direct path from one point to the next. The Map view displays the activities for addresses that Google Geo-Coding can resolve. Resolved addresses are assigned either a letter, or a plus sign. Addresses not found via Google Geo-Coding are identified with either a question mark or a minus sign next to it. Activities with addresses outside of the company boundaries will display as red. Addresses that are still waiting to be resolved are shown with a clock icon. And, start or end locations on a route that are not based on activities – such as a resource's home – are indicated on the map with either a green flag for the starting location or a red pin for the ending location. [CONFIRM THIS INFORMATION]	[Semi-transparent text box overlay] **Map View Key Points** • Routes are displayed by default as direct paths (not driving routes). • Addresses not found in Google are identified with (?) or (-). • Resolved addresses are assigned a letter or (+). • Addresses waiting to be resolved are shown with a clock icon. • Start or end locations not based on activities are indicated with a green flag or a red pin.	ETAdirect Manage screenshot Clock icon

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
34010	**Full Screen – Demo or Simulation** **Component** Lesson 3: ETAdirect Management Views Topic 4: Double Pane Options **Instructional Event** System demonstration or interactive simulation **Description** Animated process demonstration or static screen & prompt for learner action; may include text bullets and voiceover audio	**Narrator:** Another helpful feature in ETAdirect is that the Work Area can be divided into independent upper and lower panes, each one displaying a specific view, date, and Resource Tree selection. To enable the lower pane, click the plus sign, and the current selection appears again in the lower pane by default. Notice though, that there is another instance of the Resource Tree available. From here, you can make your tree selection and choose the view of the activities in the lower pane. This provides an efficient way to compare two different routes or lists, move activities easily between the selections, or view scheduled and non-scheduled activities simultaneously. As an aside, understand that the lower pane also appears when you click on the numbers representing not-ordered and non-scheduled activities from the right columns in Time view.	n/a	ETAdirect Manage screenshot with Map View Work Area Demo opening lower pane and populating with another resource tree selection.
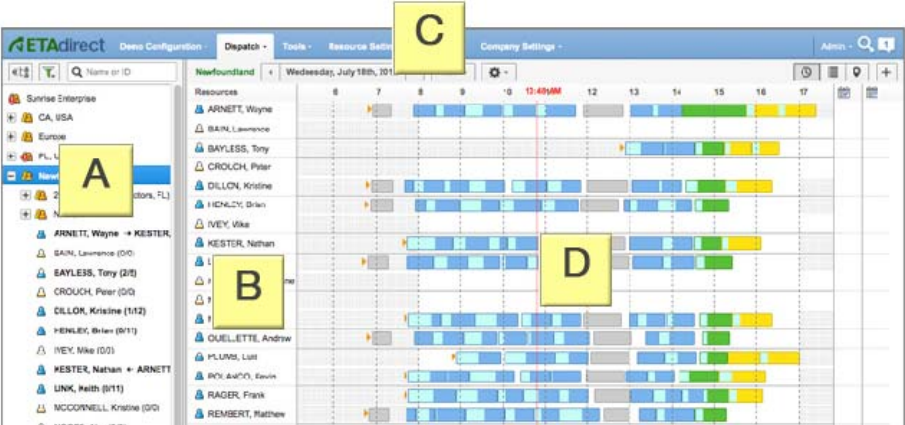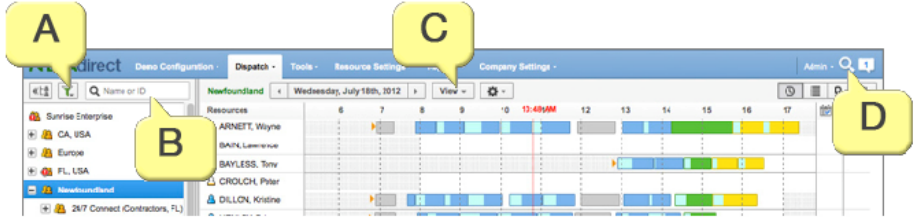
Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
35010	**Question – Multiple Choice** **Component** Lesson 3: ETAdirect Management Views **Instructional Event** Practice question **Description** Multiple choice question (single correct answer or multiple correct answers); can insert graphics as needed	(no script)	Which view shows a by-resource, chronological list of activities for a selected resource, group or bucket, including those that are unordered? (Select the best option, and then click **Submit**.) A) Time View B) List View (correct) C) Map View [Incorrect Feedback] Incorrect. List View displays activities in chronological order, including those that are unordered.	
35020	**Question – True-False** **Component** Lesson 3: ETAdirect Management Views **Instructional Event** Practice question **Description** True-or False question; can insert graphics as needed	(no script)	Time View shows the day's activities charted on a map along with a chronological list of the activities (Select the best answer, and then click SUBMIT.) o True o False (correct) [Incorrect Feedback] Incorrect. Time View provides an instant view of the day in real-time via a Gantt chart.	
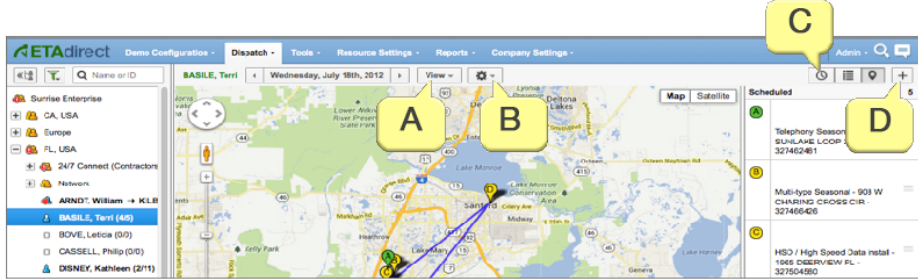
Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
38010	**Lesson Conclusion** **Component** Lesson 3: ETAdirect Management Views **Instructional Event** Key concept review **Description** Recap of key points & topics	**Narrator:** The ETAdirect SmartManage interface's multiple view options let you choose how you prefer to monitor daily progress of your field force – either via the Time view Gantt chart, as a chronological list, or with the activities plotted on a map. This lesson covered some of the features found within those viewing options. …As well as how to use the independent lower pane to view and manage additional resources and their activities.	**Lesson Review:** **ETAdirect Management Views** In this lesson, you learned about… • Time View • List View • Map View • Lower pane options	38010_p1 Manager at computer or dispatcher in office/control room Re-use 30010_i2-4
90001	**Assessment Instructions** **Component** Assessment **Instructional Event** Information presentation **Description** Bullet list of instructions for completing the assessment	(no script)	**Assessment Instructions** • Completing the assessment will help gauge your understanding of the concepts presented in the module. • The assessment includes 14 multiple choice and true-false questions. • You will have one opportunity to answer each question. • A passing score is 85% or higher. • Carefully read the directions for each question. • Click Continue when you are ready to begin.	

Slide #	Design Object/Description	Audio Script	Screen Text	Media Elements List (MEL)
98010	**Assessment Results** **Component** Assessment **Instructional Event** Assessment Results **Description** Summary of assessment results with option to re-take the assessment if failed	(no script)	**Assessment Results** Accuracy: {%}. Correct Questions: {# correct} Total Questions: {total # of questions} Attempts: {#of attempts}	12030_p1 (iStock 10106675)

Assessment Questions

#	Question	Answer Key
1.	Which area of the ETAdirect SmartManage interface is the Resource Tree? (Select the best option, and then click Submit.)	A
2.	In the Resource Tree, resources are organized into ____. (Select all options that apply, and then click Submit.) A) Buckets B) Entities C) Groups D) Inventory	A and C

3.	The large "work area" in ETAdirect displays information based on a combination of menu/sub-menu and Resource Tree selections. (Select the best option, and then click Submit.)
	    a. True
	    b. False
		A

4.	An orange colored resource icon means that the resource's route or queue is activated and the resource is working. (Select the best option, and then click Submit.) A) True B) False	B

5.	Where in ETAdirect can you configure the workload thresholds that determine the resource icon color fill levels? (Select the best option, and then click Submit.)
	    a. Company Settings
		Display
		    b. Company Settings
			Resource Types
			    c. Resource Settings
				Resource & Bucket Info
				    d. Resource Settings
					Resource Tree Configuration	B

#	Question	Answer Key
6.	Which button or field would you click to search for an activity? (Select the best option, and then click Submit.)	D
7.	Where would you click to view a hint box that could contain alerts, information about a resource and their route, and activity-oriented actions? (Select the best option, and then click Submit.) A) On an activity block in Time view B) On the Resource Tree filter button C) On the magnifying glass D) On a resource's icon on the Resource Tree	D
8.	Which ETAdirect feature empowers the field to communicate more efficiently, and also supports the functions of exchanging inventory and moving activities? (Select the best option, and then click Submit.) A) Forecasting B) SmartCollaboration C) Show Resource Trace D) Hint Boxes	B
9.	You can use My Display to modify how certain elements of the ETAdirect SmartManage interface display to you, and the changes have no effect on other users. (Select the best option, and then click Submit.) A) True B) False	A
10.	What is the purpose of the 'Show Placeholder ID' checkbox found under the My Display menu option? (Select the best option, and then click Submit.) a. To assist with changing glossary verbiage b. To activate a user's record c. To assist with creating custom properties d. To change the menu color within ETAdirect	A
11.	Which of the following is NOT a true statement about activities? (Select the best option, and then click Submit.) a. Activities can be linked by timing requirements b. "Ordered" implies that an activity must be done in a particular sequence c. Work skills and their conditions define the qualifications required to perform work on an activity d. All activities must have specific dates on which they need to be performed	D
12.	Display profiles, login policies, self-assignment and time/language preferences are examples of functions or characteristics of which entity type? (Select the best option, and then click Submit.) a. Resources b. Users c. Activities d. Inventory e. Service Requests	B

#	Question	Answer Key

13.	Which of the following is used to define areas within which a resource is available or allowed to work? (Select the best option, and then click Submit.)
	    a. Locations
	    b. Resource Types
	    c. Work Skills
	    d. Work Zones
		D

14.	Although it can track the actions associated with inventory and pass that information along to client systems, ETAdirect itself is <u>not</u> a system of record for inventory. (Select the best option, and then click Submit.) A) True B) False	A

15.	It is possible for ETAdirect routing to make activity assignment decisions based on inventory required to perform a job. (Select the best option, and then click Submit.)
	    a. True
	    b. False
		A

16.	(Select the best option, and then click Submit.) A) Time View B) List View C) Map View	A
17.	Which button divides the Work Area into independent upper and lower panes? (Select the best option, and then click Submit.) 	D

18.	Which of the following is NOT a means of viewing non-scheduled activities? (Select the best option, and then click Submit.)
	    a. A Resource Tree filter option
	    b. A link in the resource hint box
	    c. A number in the far right column of Time View
	    d. A button in the date area of List View
		A

19.	The size of a current (started) or future (pending) activity block in Time View represents an estimation of the predicted duration of that activity. (Select the best option, and then click Submit.)
	    a. True
	    b. False
		A

20.	Which of the following is NOT an option within Map View? (Select the best option, and then click Submit.)
	    a. Show nearby resources
	    b. Show driving directions
	    c. Show current traffic
	    d. Show resource trace
		C