Jobs in OneView
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Jobs in OneView

For customers who use Jobs in OneView, this document will explain how to create a new job, dispatch the job to a driver, and show examples of how to use the different features of the Jobs options.

Explanation of Jobs

The following information is meant to explain each field that a dispatcher will set for creating a new or recurring job.

Job Template

Section A:

Simple Delivery – this is the name of template chosen for this job creation. Use the dropdown to pick a different template.

Target – This is the landmark that you will choose for this job. Choose the company that you are servicing, the location that your driver will dispatch to, or other appropriate landmark.

Job Name – this number can be changed, it is a digital time stamp, so you will not see the number of other jobs in a sequential order. Change if desired.

Job Description – this description can be changed. The default description is the name of the template. Change if desired.

Assignee – this field allows you to choose a driver to assign this job to. It is optional. Any job not assigned will be held in a general job area. You can assign jobs any time.

Notes - add any notes here that belong with this job. It is common to add contact names or phone numbers, gate codes, or any other information that the driver would need in order to complete the job.
Section B

Work To Do - this area is a text entry field that you can add a description of the work the driver will need to do, or a list of the products and quantities they are delivering/picking up.

Fill Out: - this is the form that the driver will fill out on the tablet as part of this job. The template chosen in Section A will dictate what form this job will include, and what step it will be. Forms will be different for each type of job and if you need a custom form, inform your account manager or sales representative.

Go To: - choose a landmark for the driver to navigate to. The dropdown will include the ability to navigate to the target chosen in Section A or to go to a different location that you set here.

Section C

Due Date: - Set the date and time (delivery window) that this job is due. Check the Recurring box and set the recurring interval. The job will self-generate a new ticket based on the interval you set here. Optional.

Section D

Notify (first) notification any timeframe before the job is due. Choose contacts from OneView to receive this notification and set if they’re going to get a text, and email, or both. Choose the amount of time for advanced notification with the time dropdown.

Notify (second) this notification to the selected contacts, either by email, text, or both, will be sent at the date and time set in section C.
**Section E**

**Create Job And Set To Done** – this button will create the job and complete it all in one step. This job is now complete and will not show up in any queue, unless it is recurring.

**Create Job** – this button will now create this job and add it to the assignee’s queue or into the general jobs area waiting to be assigned.

**Cancel** – this will cancel this ticket and not create this job.

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**How to Set up a Job**

When users are ready to set up jobs for their drivers, they will follow these steps.

1. Click on the Jobs Tab

![Jobs Tab](image)

2. Click on Create Job

![Create Job](image)

3. Choose the Template

![Select Template](image)
Right click on the user in the asset tree that will be assigned to this job, then choose “Delivery” and then the template.

4. The template will appear in your Create Job window. Select the target and choose your landmark selector to find the landmark from your list of saved landmarks.
5. Enter a job name or leave as the system generated number. To make it easier to find or organize jobs later, changing the job name to match your company’s naming scheme would be beneficial.

![Simple Delivery example]

Or

6. Enter a job description or leave it as the name of the template. To make it easier to find or organize jobs later, changing the job description to match your company’s naming scheme would be beneficial.

![Simple Delivery example 2]

Or

7. In the Assignee field, use the select assignee option to select a user from your asset tree, and then this job will fall directly into that assignee’s queue. Leave it blank and the job will be available for you to dispatch at will later.

![Assignee selection example]

8. Enter notes that the driver can see in POV when they look at any step of the job.

![Notes example]
9. Tasks setup will depend on which job template you choose. A basic overview of general tasks is listed below. You may have custom forms or a custom template that will be slightly different.

**Work To Do Tasks:** any work to do tasks allow you to add up to 2500 characters. The task name on the tablet will reflect the first 40 to 50 characters.

![Work To Do Task Example](image)

(Driver’s view in POV on tablet)

**Fill Out:** The form type is part of the template that you chose for this job. There are many types of forms and if you need something custom, work with your account manager or sales representative. You don’t need to do anything with these forms, unless you are creating the job and filling it out, and setting it to “done” now.

- [ ] Fill Out: Delivery Form
- [ ] Fill Out: Roustabout Ticket
- [ ] Fill Out: Water Hauling Load Form
- [ ] Fill Out: Water Hauling Unload Form

**Go To:** This step sets up the navigation for this job. The go to step requires a landmark in OneView. You must set up your landmark before you can assign it to a job.

**Default To Target:** This will use the Target set in step 4 as the location to navigate to.

![Go To Target Example](image)
Select Landmark: This will bring up your landmark selector tool. Either hover over a landmark folder to select the landmark to use for navigation, or use the search feature to find the landmark and check to select.

10. Due Date: Set the due date and time for this job. The time is included for situations where there is a window of time that the delivery is due to the customer. The Recurring check box allows you to set this job to automatically create new jobs based on the timeframe set here. If this job is assigned to a driver, the new recurring jobs will automatically fall in that driver’s queue each time the system creates a new job ticket.
11. **Notification**: There are two types of notifications. The first is to notify whomever is selected in the contacts field **BEFORE** the job is due.

The second is to notify the selected contacts **ON** the due date and time.

12. When you’re finished, create the job, or create the job and set to done.

**Create Job** – After adding all of the required elements to create the job, click Create Job in the lower right corner. You will see a confirmation message the job has been successfully created.
Create Job and Set to Done – Use this button if you have already completed this job and are adding it to the system for your records. It will ask you when the job was completed, also for your records.

Jobs Display in OneView

Any jobs that have been created in OneView can be displayed a number of different ways. The following is a simple overview of display options.

On the right side of the Jobs page, there is a dropdown option to choose which view you want to use.

Dispatch View

The Dispatch View organizes each job as an interactive block that can be dragged from the left side, where unassigned jobs are stored, over to the user’s queue on the right.
List View

The List View organizes each job as a list. The columns are filter options. Click the column head to reorder the jobs alpha-numerically based on that detail, or use the filter options within any column to sort the jobs.

Click inside the white area at the top of each column to filter by that detail:

One way to add an assignee is to use edit pencil on the right. It will bring up the original job window where you will add an assignee. (There are multiple ways to add/change the assignee.)
Show/Hide Columns

In the list view, at the bottom of the page, use the Show/Hide Columns button to rearrange the order of the columns, hide columns you do not want to see, and show columns you previously hid.

Click and drag columns to re-order. Uncheck any columns you want to remove/hide. Use the Reset button at the bottom right to bring everything back to the default setting, putting them back in original order and showing all columns.
Map View
The Map View organizes jobs on a map on the top of the page. Use the filter to narrow your list of jobs.

Edit User List/Queue
On the right side in the dispatch view you have the ability to edit which assignees appear in this list and the ability to edit the order of jobs assigned to a user.

Assignee Select Actor
Click in the white field in the Assignee header to select which drivers/users appear in the assignee list.

Choose the drivers from your asset tree selector.
Assignee Options

Right click on a user to see options:

- **Sort By Due Date**: sort job in the user’s queue by the due date and time of assigned jobs
- **Sort By Most Eff. Route**: sort the jobs in the user’s queue by the most efficient route for time and miles

Edit Jobs

If you need to edit a job already created in OneView, find it on your list of jobs. **Right click** on the job name and choose **Edit**.

**OR**

Click on the icon in the upper left corner in a job block to open the job window. Then click the Edit Job button in the lower left corner of the job details window.

**OR**

In the list view, use the edit pencil in the far right column to open the original job.
Complete a Job in OneView

If an occasion occurs where you will complete a job in OneView instead of a driver completing the job on the tablet in POV, simply click on the job name from the unassigned jobs, the list of jobs, or driver queue, or right click on the job and choose View. Each task or step of the job is listed on the right. Enter the information necessary to complete each task and save your work. Task types are explained below.

### Time and Date Tasks

For tasks that need a date or time, use the now button if the current time is what you want, or click in the time field to reveal a clickable calendar.
The time field also allows users to type in the date and time. When typing the date, most formats are automatically recognized, whether its 9-12-19, or Sept. 12, 2019, or 9/12/19, and other formats are all recognized by OneView.

After entering a date, you can edit the time from the time selector or click in the date field and enter a time. Military time will be converted to AM/PM automatically.

Save – when the time task has started, you will see a save button. Save your work at any time. The task will not show as done until you click Save.

When a task is done, the gray check icon shows on the left side of the task bar and an edit button on the right.
Fill Out Form
Forms within the job will have multiple fields to fill out. These fields could vary from simple entry, select from a list, add scans, add date/time, and more. Since your company may be using custom created forms, you may or may not see an example of that type of field in this document.

As soon as you start entering data into a form, the task header will show a blue “Mark as Done” button which also appears at the end of the form, and the bottom of the job window will include two buttons: “Save” and “Save & Mark All as Done”.

Forms that have been filled out and saved will appear when a user clicks on the PDF icon on the “fill out” task.
If you click the PDF icon on a job that does not have a completed form, you will see a message that there are no saved forms for this task.

Unsaved Changes
If you have unsaved changes and try to close the job window, a warning message will appear asking if you want to proceed without saving and that any unsaved changes will be lost. You can proceed if you don’t want to save any of the changes, or Cancel and then save your changes. Once all your work is saved, you can close the window with no warning message.
Jobs in OneView

Job Details Window

When you click on a job, you will see a job details window that allows you to complete the job in OneView, edit the job, Clone the job, Delete the job, and view its tasks, schedule, and history.

Job Summary Tab

The left side of the job window includes multiple tabs. The first tab is the Job Summary. This tab includes details about the job with links to the target, assignee, linked assets, the creator of the ticket and route (permissioned). In the summary, you can now use the edit pencil to change the assignee of the job instead of having to edit the original ticket just to change the assignee field.
Map Tab
Use the map tab on the left side of the job window to see the location of the target(s) of this job. If you have any assets near the landmarks, you will see the assets also. This map is interactive, like all maps in OneView. Use the map dropdown to change the type of map, add traffic or labels and all other normal map features like zoom and street view.

Schedule Tab
The details of how this job was scheduled is included on this tab. For dispatch jobs, the due date will be there, and if this job is recurring, you will see the interval of how often this job will reschedule. For maintenance jobs, the schedule also includes each trigger used to schedule the recurring maintenance.
History Tab
This tab shows all of the activity associated with this job. You will see when it was created and by whom, if the job reached any due triggers, if the job was altered or changed, like when a new assignee was added, and if alerts or notifications were sent out.

Job Status
The color blocks indicate the status of the job. Yellow is new, Blue is In Progress, and Gray is Done.
**Edit Job**
Use the Edit Job button to view and edit the original job. *(See Edit Jobs)*

**Clone Job**
Jobs can be duplicated or cloned up to 10 times with the Clone Job button.

Be sure to change the details for each of the cloned jobs to reflect new due dates, targets, assignees an any other details necessary.

**Delete Job**
Use the Delete Job button to delete any job and any subsequent recurring jobs.
Import Jobs
Jobs can be imported through a csv on the Jobs tab. Click the import button and then download the file template.

Use the CSV template to add multiple jobs. Each job added to this spreadsheet should be the same type of job.

- **Name**: name of the job
- **Description**: description of the job
- **Notes**: notes for each job
- **Target**: the landmark that is the target of this job
- **Assignee**: the driver who will be assigned to this job
- **Due Date**: due date of this job
- **Secondary Target**: if the job has a second location, use this field to add that next landmark target. If it does not use a second location, leave it blank.
Select Template

You must select which job template you want the jobs in this spreadsheet to use. You may only select one template per spreadsheet, so if you have more than one type of job, you will use more than one csv.

Routes

If you have the routes feature, you will be able to create and assign routes to your driver(s) that contain multiple jobs within it. There are multiple ways to create a route from any jobs page. The following descriptions will show you how.

A route on the dispatch view looks like a folder with multiple icons inside representing the individual jobs within the route:
Create a Route from Dispatch View
Creating a route on the dispatch view is as easy as a right click on any job.

Right Click to Create Route
If you are on the dispatch view showing the jobs as blocks, you can right click on any block and choose “Create Route.” This will open the Create Route window (see Create Route Window section).

CTRL Click Multiple Jobs to Create Route
By holding the Ctrl button on your keyboard and then clicking on separate jobs, after your final selection, right click and choose the Create Route button to make a route out of the selected jobs. (On a Mac, use the Command button and click on different jobs to select.)

Create Route Button
Use the Create Route button above the filters to create a route.
**Create Route from List View**
Creating a route from the list view is as easy as right clicking on an existing job.

**Right Click to Create Route**
On any job that you want to include in the new route, right click and choose Create Route from the menu.

**Ctrl Click or Shift Click on Multiple Jobs**
Use Ctrl Click to select multiple jobs that are not next to each other, or Shift Click to select multiple jobs that are next to each other. Then use the right click to reveal the ability to create a route from your selections.

**Create Route Button**
Use the Create Route button above the filter at the top of the page.
Create Route on Map View
Creating a route from the map view is as easy as right clicking on an existing job.

Ctrl Click or Shift Click on Multiple Jobs
Use Ctrl Click to select multiple jobs that are not next to each other, or Shift Click to select multiple jobs that are next to each other. Then use the right click to reveal the ability to create a route from your selections.
Create Route on the Map
You can create a route right on the map by using the shift key and dragging a box around the jobs you want to include in the route. All jobs within the drawn area will be included in the route you are creating with this method.

Create Route Button
Use the Create Route button above the filter at the top of the page.

Route Window
After you choose create route, the route window will appear where you can add details about the route.
Route Name
Type the name of your new route in the Route Name field.

Route Start
Click in the Route Start field to reveal a calendar and time picker to choose the date and time that the route should start, like a due date.

Route Assignee
You can choose to assign this route now or later. If you are assigning this route now, click the Assignee field and a selector window will appear where you can choose the driver to assign to this route.
**Route Origin**
The route origin can be important for many reasons. Set a route origin by selecting a landmark as the starting place for this route.

**Create Route Button**
After filling in all the details of your new route, click Create Route.
Add Jobs to Route
If you right clicked, or used Ctrl click to choose multiple jobs to create the route, all of the selected jobs will automatically be linked to the route you just went through the process of naming and creating (see previous steps).

Create Job Button
Within the route window, at the bottom right corner, there is a + Create Job button that would all you to add a completely new job to this route within the window. Just set the fields and hit save.
**Drag and Drop Jobs into Route**

On the dispatch view, you can select any job or multiple jobs and drag and drop them onto a route. This adds the selected jobs to that route.

![Image of drag and drop feature]

**Clone Route**

To make quick copies of any route, you can choose to clone the route up to 10 times. Start with a right click on a route and choose clone, or use the clone button inside the route window.

![Image of clone feature]

**Choose number of copies**

Use the Number of copies dropdown to choose how many duplicates you want to create from this route.

![Image of clone route feature]
Add/Change Route Details
For each new route, change the details like the route name, start date/time, route assignee and job names**.

**Clone Job Names
For Job Names within your cloned route, you have two choices:

Copy – will copy the exact same job names in the new route as the job names in the route you copied from.

Unique – will generate new names for each of the jobs within the route.