Infor LN Service User Guide for Territory Planning Workbench

Important Notices

Trademark Acknowledgements

Publication Information

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About this document

This guide provides information about the various concepts and processes such as territory planning, implementing territory planning and recalculating travel time, available for the Territory Planning Workbench.

Objectives

This document is designed to meet the objectives described below. It is assumed that you already have a understanding of Infor LN Service

- **Understand the following concept**
  Territory Planning
- **To perform the following tasks**
  Implementing territory planning
- Recalculating travel time

Document summary

This guide explains the various concepts and processes available in the Territory Planning workbench.

How to read this document

This document is assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to Infor LN Service Online Help.

Please refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document.

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Chapter 1
Territory Planning Workbench

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This chapter provides an overview of the territory planning functionality and the territory planning workbench.

Introduction to Territory Planning Workbench

The territory planning functionality enables you to perform territory and preferred engineer simulations. The objective is to reduce travel time by clustering the interchangeable work in geographical areas.

You can select, using the defined selection criteria, the serialized items that must be serviced (required capacity) in a certain geographical area. The Infor LN calculates the required capacity based on historical and/or known data. To check the available capacity, the user can referred to the existing service engineers, as well as engineers retrieved from the simulation process. This provides more flexibility from the planning prospective. If the calendar and availability type of an engineer is specified, the Infor LN calculates the available capacity. The user can use the simulation results, to modify the preferred engineer for the serialized item and/or the territory.

Positioning

The Territory Planning Workbench is positioned with Service Planning modules. The modules that are part of the Service Planning are Territory Planning, Preventive Maintenance Planning, and Group Planning. The territory engine compares the required capacity for the serials, with the available capacity (the engineers or simulations engineers). The engine calculates the best possible combination of the required capacity for the serialized item and the available capacity. Optionally, an engineer can be made responsible for a territory and the optimal territories can also be calculated.

Launching the Workbench

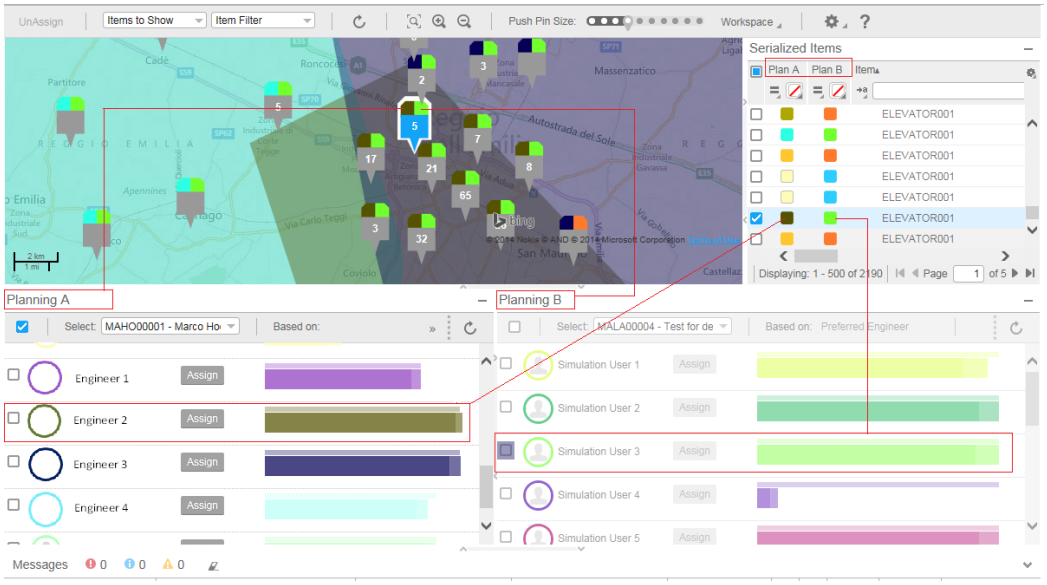
To access workbench, you must select a plan in the Territory and Preferred Engineer Planning (tsspc4100m000) session and select the **Territory Planning Workbench** option. The selected plan is uploaded in the Territory Planning Workbench (tsspc8351m000) session.

Layout

Use the workbench to perform territory and preferred engineer simulations, taking into account the various constraints such as reference points, service engineer location, center of gravity, serialized item and so on.

When the workbench is accessed, all the data related to the serialized item, preferred engineer, reference points is populated.

The workbench includes these sections:



- Serialized Items : This section list provides the list of serialized items for which service activities have to be performed. The items can be listed individually or collectively for both the Planning A or Planning B.
- Graph : This section provides the graphical view of the resource capacity (territory/preferred engineer).
- Map : This section provides the pictorial/geographical representation of the serialized items, preferred engineers, reference points and so on, using various icons.
- Planning A and Planning B : This sections are used to view and compare the plans. The planning can be performed based on the territory or preferred engineer. The information in the graph is based on the option selected in the 'Based on' field.
- Message Section : This section displays error / warning / information messages.

Chapter 2
Territory Planning Toolbar and Map Icons

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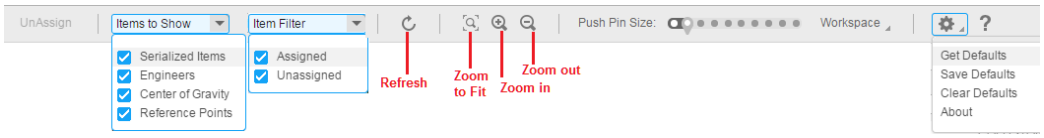
This chapter provides a detailed description of the various toolbar options and the icons that helps the user to navigate the workbench easily.

Workbench Navigation

Toolbar

The following option are available:



- Unassign : You can use this option to un-assign an engineer from the selected serialized item.
- Items to show: This displays a list of map layers. When you select/unselect an item, the item hides/displays the respective layer on the map. By default, all the layers are selected.
- Item Filter: This value can be set to Assigned and/or Unassigned. By default both Assigned and Unassigned are selected. When the user unselects an item, for example Assigned, only the unassigned items are visible on the workbench (on map and also on Grid).
- Refresh: Refreshes the data for the selected territory plan(s).
- Zoom To Fit: This option allows you to increase the map size to the optimum level, so that all the serial items on the map are visible.
- Zoom in, Zoom out : This option is used to zoom in and zoom out the map.
- Pushpins size: This is used to increase and decrease the size of the pushpins on the map.
- Workspace Menu: This includes various menus relating to the UI layout of the workbench.
- Settings and Help: The settings menu includes options related to default settings and layout settings.

Territory Planning Icons

The following icons are used in the territory planning workbench.

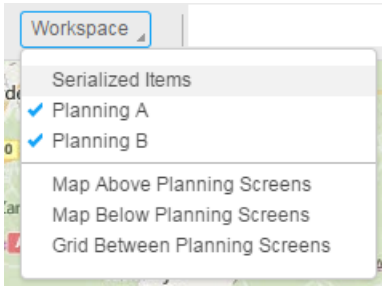
Icon	Explanation
	This icon represents the location of the engineer (if specified in territory planning). All the serialized items assigned to the engineer are in the same colour and the icon must have the color of the serialized items that are assigned to the engineer. **Note** This icon also displays the picture of the engineer, if available. You can add a picture using the drag-and-drop option.
	This icon represents the reference point that is specified for the engineer. This reference point must have the same color as that of the engineer assigned.
	This icon represents the center of gravity of the items that belong to the same territory.
	This icon indicates a serialized item ■ The amber colour part indicates that the item is linked to a territory planning specified in the Plan A and is assigned to either a territory or a preferred engineer. ■ The blue colour indicates that the item is linked to a territory planning specified in the Plan B and is assigned to either a territory or a preferred engineer.
	This icon represents the serialized item specified in the Plan A of the work bench. The serialized item is not linked to a preferred engineer or territory in Plan B.
	This icon represents the serialized item, with only one territory planning is selected either in the Plan A or in the Plan B.

Note

The guide lines for images are as follows:

- The employee image that is uploaded must have a 500x500 dimension
- Resolution must be 300 dpi and above. A Lesser Dpi can scatter the image.
- The images can have these extensions: .jpg, .gif, or .png.

Workspace Menu



The Serialized items, Planning A and Planning B are the various sections in the workbench. The toggle menu and the docking control, allows you to minimize or maximize these sections.

The other options are the default layouts for the workbench. For example, when you select the Map Above Planning Screen option, the map is placed above the planning A and B section and the serialized items grid is placed on the right side of the map. You can further customize this view by arranging the section using the drag and drop options of the docking control. The user can save the new setting using the Save Settings option in the Settings Menu . The same view is available every time you access the workbench.

Multi-Screen scenario and Default views

The Workspace menu provides three default views. With the help of these views, users can build their settings. For example, if you want to have a multi-screen environment and the map must be placed on one monitor and the rest of the planning screens on a second monitor, you must:

- Select a default view.
- Customize the view as per your requirement
- Save the view using the Save Settings option.
- Next time when you open the workbench, the last saved view is available.
- You can resizes the browser and stretches it to the width such that one portion appears on monitor 1 and the second one appears on monitor 2.

Chapter 3
Personalization

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This chapter provides a brief description of the various settings available for the user.

User Settings

- Get Defaults : Use this option to view the default setting.
- Save Default : You can create your own view by clicking on the sections available in the session. Use this option to save your default setting. The same view is available every time you access the workbench.
- Clear Default : You can use this option to clear the default setting. After you clear the setting, the Infor LN, default view is displayed when you access the workbench

Chapter 4
Resource Planning and Impact Analysis

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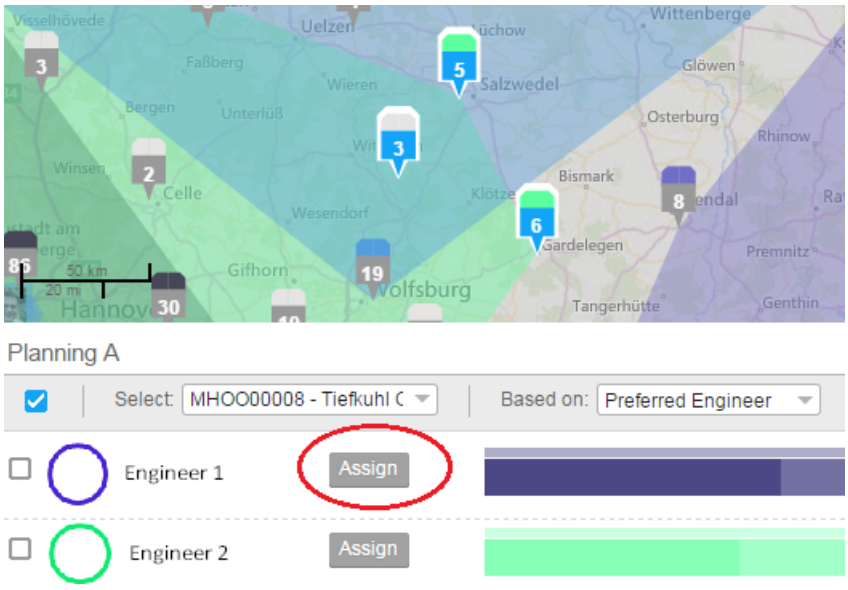
This chapter explains resource utilization that can be analysed using this workbench.

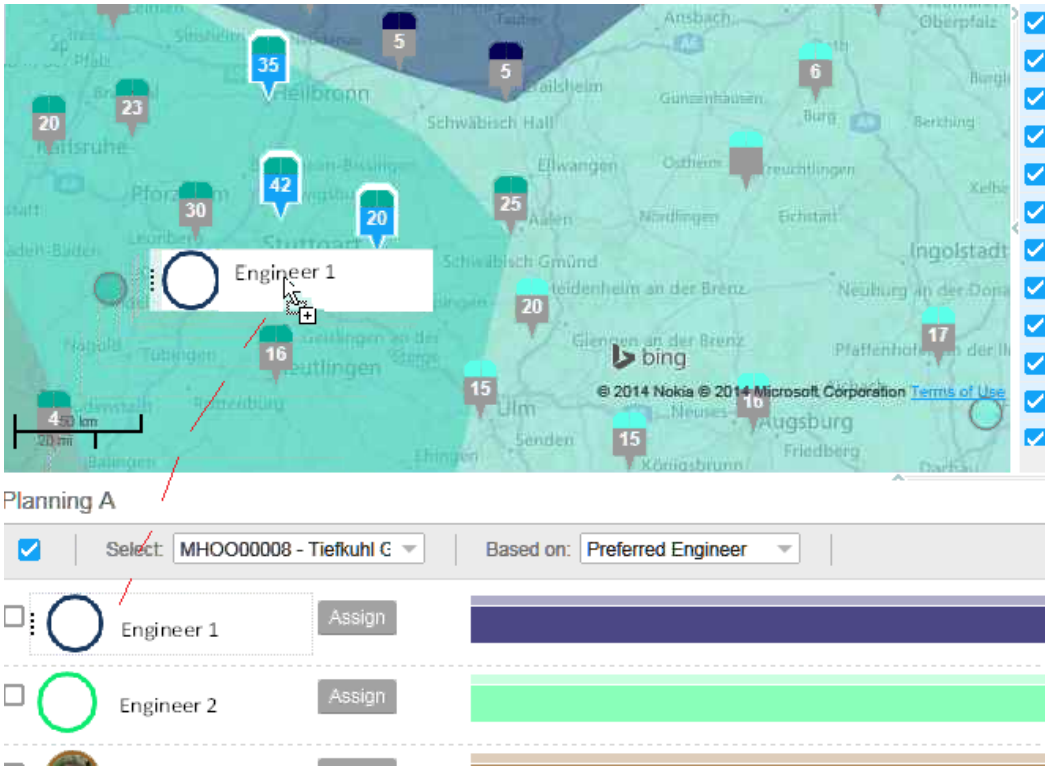
Assign/Unassign Resource and Impact Analysis

Assign Resource

User can assign a resource to a single item or a group of serialized items. The user must select the serials to be assigned to an engineer, from either the map or from the grid and assign the serials using:

- Assign Button - The user can click the Assign option provided for each resource in the resource chart.
- 

- Drag Drop - The user can drag and drop the employee from the resource chart on to the map.

- 

Unassign Resource

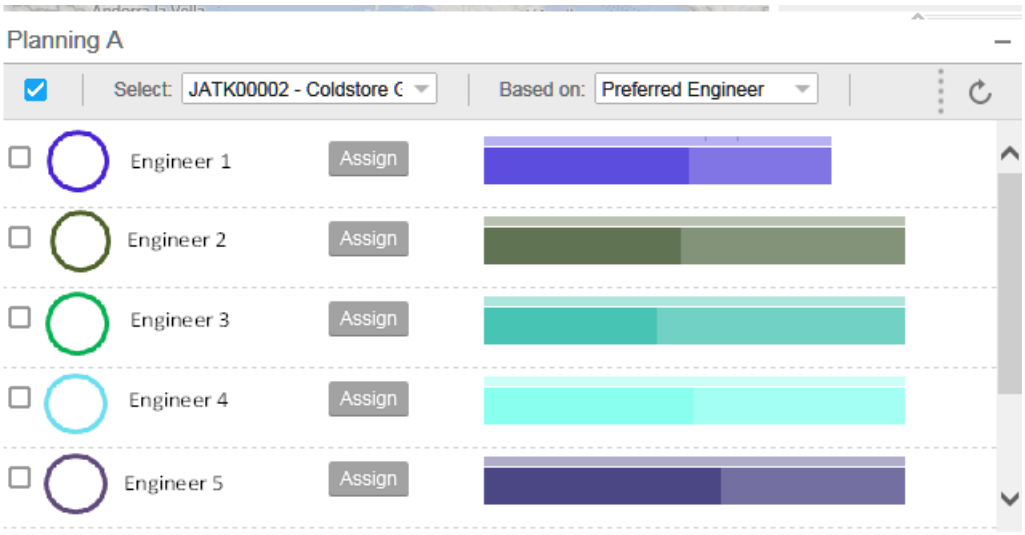
- You can use this option to un-assign an engineer from the selected serialized item. This unassign button on the toolbar is enabled:
  - When a serialized item(s) which is already assigned to an engineer is selected .
  - When the selection does not contain items from both Plan A and Plan B

Note

The Assign/unassign option is used only for the serials that belong to an active territory planning.

Working with Chart

The resource chart provides the user with a snapshot of Available capacity, Workload and travel time information, for each resource.



- Active: This check box indicates that the plan is active. Only one plan can be active, at any given point of time. When a plan is active:
  - The engineers, the center of gravity, reference points and convex hull is displayed on the map, for this plan.
  - The Assign button is enabled for the resources available in the active plan.
  - The Drag drop is enabled for the resources available in the active plan.
- Select: This field displays a list of all the territory plans. Only one plan can be selected at a time.
- Based On: You can set this field to Preferred Engineer or Territory. Based on the selected value, the workbench displays the respective data. This value can only be modified for the active plan and the same value is applicable to the inactive plan in the comparison mode.
- Refresh: The refresh button helps the user in impact analysis. For more information refer to Impact Analysis section.
- Selection: If this checkbox is selected, all the assigned items for this resource are selected on the map and grid. A user can select multiple resources.
- Graph: The graph displays the capacity for the engineer in various sections (displayed with shades of the same color). Tooltip displays the capacity type.

Impact Analysis

The user can perform an impact analysis for an assignment scenario to determine the impact on the capacity of the various engineers, in the plan. To perform this action, the user has to:

- Select the serials to be assigned from Map or grid
- Click on the Refresh button on the Planning section's toolbar.

The impacted capacity is calculated and displayed as selected capacity. If you modify the selection, the chart is reset to original capacity.

Chapter 5
Planning Concepts

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This chapter provides a brief description of the various planning concepts.

Working with Plans

The user can select a territory plan from the 'Select' field on the planning A or planning B. The user can also view the territory plan based on the preferred engineer or territory by setting the value in the 'Based on' field.

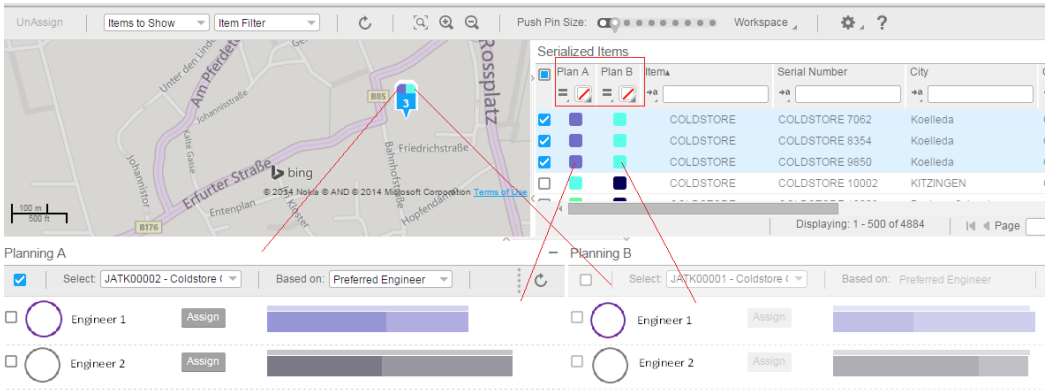
Single Plan

When a single plan is selected, the reference points, serialized item, preferred engineer, location of the engineers related to that Plan, are visible on the Map.

Comparing Plans

In a comparison scenario where both Plan A and B are selected by the user, the data on the left represents Plan A and right side represents Plan B. There are generally two such representative items:

- Serial items on map
- Serial items on grid

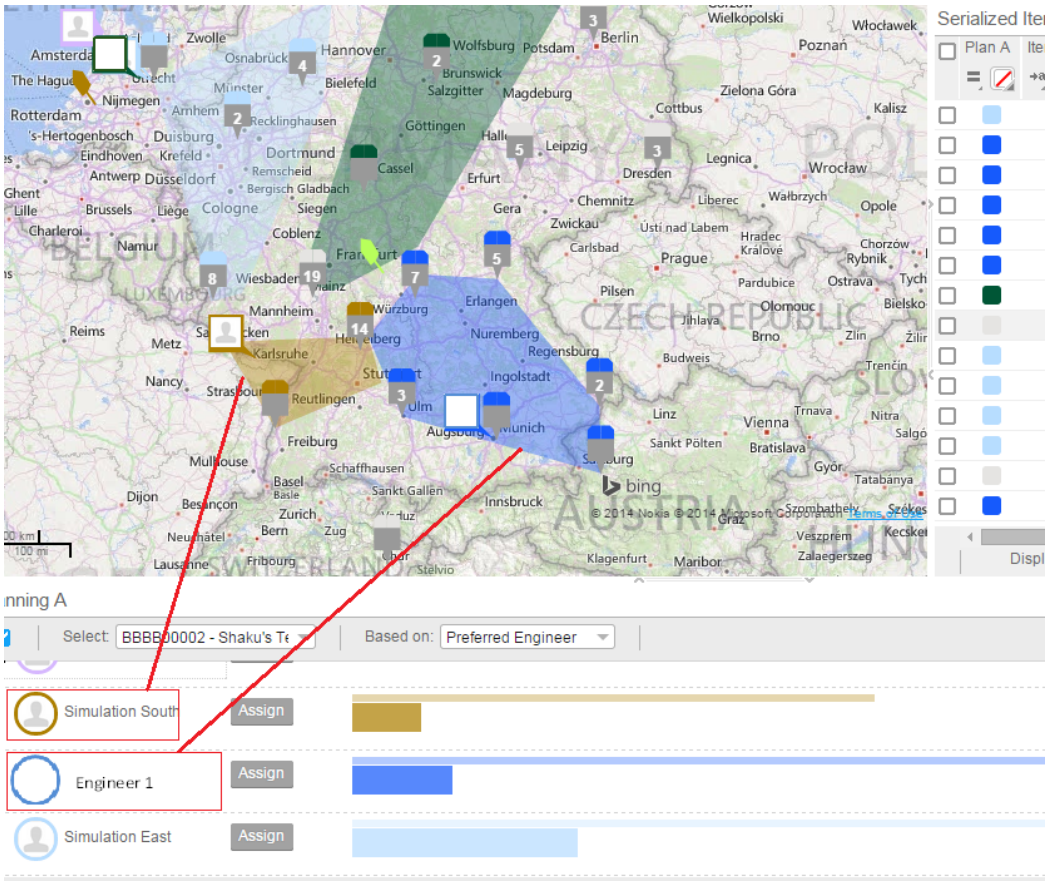


- **Role of colour in Comparing two plans**
  Colours are used predominately to identify the serialized items with an assigned engineer or a territory. All the assigned serialized items are of the same colour as the engineer/territory that the items are assigned to.

  To compare two plans:
  - Select a territory plan from planning A
  - Select a territory plan from planning B
  - Set the plan to active
  - Change the 'Based on' value as required. This changes the 'Based on' value for the other plan.
  - Based on the selected plan, the plan A and B color columns are displayed that denote the color code of the assigned engineer/territory. If the column is Not Applicable, the color column can have a 'No Color' value.

Convex Hull

The Convex hull is a geographically bound, colored area that denotes the region in which an Employee/Territory is assigned with serials. This helps the user to effectively plan and assign/unassign the serials in that area.



Note

The Convex Hull, the Engineers, the Reference points and the Center of gravity that are marked on the map are relating to the ‘Active’ plan. Example, When Plan B is active (the checkbox is selected), the items pertaining to the engineers in Plan B are displayed. When Plan A is activated, the Plan A data is displayed.