



# Service Providers - Allocation agreements setup

Planon Software Suite

Version: L105

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## Contacting us

If you have any comments or questions regarding this document, please send them to: [support@planonsoftware.com](mailto:support@planonsoftware.com).

## Document Conventions

### **Bold**

Names of menus, options, tabs, fields and buttons are displayed in bold type.

### *Italic text*

Application names are displayed in italics.

### CAPITALS

Names of keys are displayed in upper case.

## Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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# Allocation agreements for Service Providers

With the **Allocation agreements** solution you can extend your existing service offering with *flexible assignment of team(s)*. The solution will take the teams' calendar and contractual terms for time into consideration when allocating work outside regular working hours.



The **Team orders** that can be assigned in Planon AppSuite belong to a completely separate process and do not have any relation with this new solution.

Within the **Customer contracts** TSI, you can create *allocation agreements*, where you select 'regular' and 'on-call' teams that will subsequently be allocated 'automatically' to certain scopes of work.

For a regular **Team**, the main goal is finding (and assigning) the appropriate team responsible for the work when a response is required during regular working hours.

For an **On-call team**, the main goal is finding (and assigning) the appropriate team that operates outside regular working hours and ensuring that the appropriate people of that on-call team (based on planning) are notified / informed.

With the right configuration and settings, the regular teams and / or on-call teams will be able to respond adequately within the required time frame and meet the SLAs and contractual obligations.


# Concepts

The following topics describe the concepts that are key to understanding the functionality.


## Allocation agreements and dynamic order allocation

As a service provider, you can provide continuous services to your customers, based on their customer contracts. With Planon's *Dynamic order allocation* you can register dedicated team(s) for these customer contracts, who will be responsible for all or part of the contractually agreed services. The dynamic order allocation mechanism will make sure that the right regular team or on-call team is automatically assigned when the back-office adds a work order for these customer contracts.

**Allocation agreements** are the contractual part of this mechanism. In **Customer contracts**, you can add **Allocation agreements** to link specific service teams to the customers' contractual agreements.

 Allocation agreements for teams do not always have to align fully with the other contractual agreements. For example, a contract may consist of several [service agreements](#) per building, with different sets of terms per building. However, you may still want to link one team to the various service agreements per building, in order to assign a single responsible service team.

Most customer contracts will be generic by nature and only require a link to one specific regular team and one or more on-call team(s). Also see [General allocation agreement](#).

 The following applies with regard to *Planned preventive maintenance* (PPM): if the contract line that is linked to an allocation agreement is of the type **Preventive**, it is not possible to have automatic detection of *on-call teams*, since these teams are only involved in reactive maintenance. For *regular* teams, automatic PPM order allocation is possible. See [Contract lines for customer contracts](#) for more information on the various types of contract lines.

## General allocation agreement

Most customer contracts will be generic by nature and only require one regular service team and one or more on-call team(s). By specifying a **General allocation agreement** on a contract line, you can quickly and efficiently make settings for the generic team services. The general or default allocation agreement applies to the contract line as a whole. The structure of general allocation agreements is very similar to that of the **General terms** on a service agreement.

Characteristics of general allocation agreement:

- A general allocation agreement can be linked to only one contract line and a contract line can be linked to only one general allocation agreement.
- There is a link with one default service team and one or more on-call teams via the selected **Allocation group**.
- There is a link with one set of **'Time to' thresholds**.



If no 'Time to' criteria are specified on the **Terms for time**, the thresholds will be 0.

- One **'Time to' threshold** type (TTR, TTA, TTF or TTC) is marked as the primary 'Time to' criterion.

## Specific allocation agreement

**Specific allocation agreements** are used to define deviations from the general allocation agreement. The general allocation agreement will apply to the majority of team allocations, but to cover the special cases you must define specific allocation agreements.

Characteristics of a specific allocation agreement:

- You can choose from various types when adding a **Specific allocation agreement**. They are listed below in the sequence that Planon uses to detect the appropriate regular team and on-call team upon adding a work order (it is a similar detection mechanism to the one for service agreements). The highest priority is given to agreements at the lowest level (allocation agreements for assets) and the lowest priority to the highest level (allocation agreements for contract lines):
  - Contract lines
  - Location types
  - Service locations
  - Space categories
  - Spaces
  - Asset groups
  - Assets

*Example:*

- A customer contract has links to a **General allocation agreement**, a **'Contract line' allocation agreement** and an **'Asset' allocation agreement**.
- The back-office adds a work order and fills in an asset that is also linked to the **'Asset' allocation agreement**. The team and on-call team from that **'Asset' allocation agreement** are filled in on the order, because that is the type with the highest priority.



- The back-office did not fill in an asset. However, they do fill in a space. The teams linked to the **'Space' allocation agreement** are now filled in on the order.
- The back-office does not enter any asset, space, property or contract line when adding the work order. The teams linked to the **General allocation agreement** are now detected. The **Team** and **On-call team** fields on the order will be populated with these teams.
- Per specific allocation agreement type, one or multiple **Regular teams** can be linked.
- Per specific allocation agreement type, one or more **On-call teams** can be linked.
- **Service agreement service(s)** can be linked to the teams to allocate the appropriate regular and / or on-call team.
- **Trade(s)** can be linked to teams to allocate the appropriate regular and / or on-call team, if no service agreement service is found.
- To prevent multiple regular and or on-call teams being found, make sure (per allocation agreement type) that there is no overlap of linked trades and services between the linked teams.
- Only one **Specific allocation agreement** of the same type can be linked. For example, you cannot add two **'Asset' allocation agreements** to the contract for the same asset.
- A relevant **'Time to' threshold set** can be linked.

## Allocation group

**Allocation groups** provide an easy and efficient way of setting a default allocation agreement that can apply to multiple customers. The efficiency is derived from the fact that most service provider's contracts are generic and have one specific regular team and one or more on-call team(s). In the **Allocation groups** TSI, you can define one or more allocation groups for all generic cases. An allocation group can subsequently be selected on multiple **Default allocation agreements**. It will save you the trouble of having to define the same team allocation data for multiple customers / multiple customer contract lines.

## Allocation planboards

In the **Allocation planboards** TSI, you can create and edit an **On-call team schedule** per on-call team. Next, you can graphically plot the 'on duty' periods for the on-call team members in this schedule.



An on-call team schedule can also be added in the **Teams** TSI, but no actual scheduling of the team's shifts can be done there.

In the **Allocation planboards** TSI you can schedule the on-call duties (shifts) for all team members. Each on-call team member can be scheduled for a selected planning

period, according to the on-call team's set-up. Every shift will include one or more team members in the order of their 'on duty' priority. **Coordinators** are part of the on-call team set-up and do not need to be planned in separately.

After finishing the basic planning in the **Allocation planboards** TSI, you can add **exceptions** per team member to their 'on-call duty'. Basically, an exception is any day or number of hours this person is unavailable for on-call duty and replaced by another team member. You can also apply edits / changes. The finalized planning can be viewed by the team members for upcoming on-call availability or changes.

## Allocation thresholds

To allow an on-call team to respond in time to an SLA, some flexibility can be specified per 'Time to' KPI (see ['Time to' KPIs in allocation agreements](#)). This flexibility is provided by the **Allocation thresholds**. The thresholds define the crossover times between working hours and non-working hours. The thresholds can be applied to the **Start** or **End** of the working periods by entering either positive or a negative number of minutes, to increase or decrease the working hours. By using thresholds, you can manage how orders that are added close to the start or end of the working day should be handled. Once defined, the set of thresholds can be applied to most generic contractual agreements.

Characteristics of **Allocation thresholds**:

- 'Time to' thresholds are set in *minutes*. You can enter either a positive or a negative number of minutes to increase or decrease the period of non-regular working hours. Positive numbers *increase* working hours, negative number *decrease* the working hours. The range is between 120 minutes and -120 minutes.
- Thresholds can be set per TTR, TTA, TTF and TTC criterion, as a prefix or suffix to the period of working hours.

## On-call team

On-call teams can consist of members of regular teams, but also of engineers / technicians who do not belong to a [regular team](#). On-call teams are linked indirectly to regular team(s) via the agreements and are responsible for the execution of an order when this order falls outside the work schedule of the regular team.

## On-call duty and exceptions

Members of a on-call team can be scheduled on the planboard, according to their 'on call' priority. This defines their on-call duty. Per individual team member, you can define *exceptions* to the on-call duty, to specify that a person is not available a particular date / time and will be replaced by another team member for the time of absence. See also: [Scheduling on-call team duty](#) and [Adding exceptions and replacements for on-call duty](#).

## Schedule for on-call team allocation


On the team allocation planboard you define the on-call teams and their respective schedules, including handover days and times). After an on-call team schedule has been defined and saved, *planning periods* with a fixed start and end day and time are displayed on the planboard. Subsequently, you can specify per planning period when the individual team members are actually 'on duty'. It is also possible to enter exceptions to the on-call duties per team member, as required.

 Currently, only weekly planning periods are supported.


Example:

- On-call team = Team A
- Planning period frequency = weekly
- Handover day = Friday
- Handover time = 15:00
- Schedule applicable from 1-1-2021 until 12-31-2021 15:00

This will result in 52 planning periods for on-call team A, each starting and ending on a Friday at 15:00 h (handover day and time). Please note that if the **Start date-time** of the planning period is different to the **Handover day/time**, you will create one planning period that is shorter than a week. This is illustrated by the following image, where the first planning period, outlined in red, is smaller than the subsequent weekly planning periods on the planboard.



Priority	4/29/2021 13:45	4/30/2021 17:00	W18	W19
STBY04, Stand-by team 4	4/29...	4/30 - 5/7	5/7 - 5/14	
1	019, ...	107, Langley, A Allan		001, Mease, A Adrian
2	016, ...	019, Coldwell, C Catherine		016, Petersen, B Brian
3	020, ...	001, Mease, A Adrian		020, Emmerson, M Matt
4	001, ...	020, Emmerson, M Matt		019, Coldwell, C Catherine
5	107, ...	016, Petersen, B Brian		107, Langley, A Allan

 Any cross-over times between an on-call team and a regular service team are defined by the [Allocation thresholds](#) that are specified on the allocation agreement.

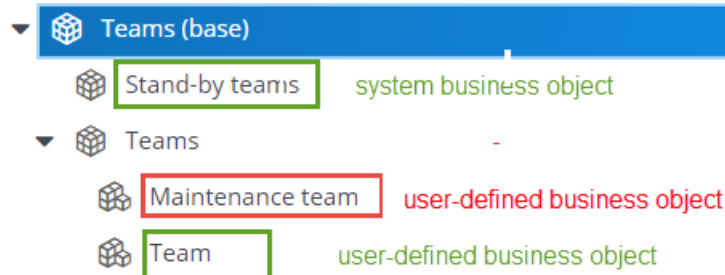
## Team

In general, a **Team** in Planon ProCenter is a group of engineers / technicians that is responsible for the execution and technical completion of an order.

**i** In **Allocation agreements**, *only work orders are in scope* for a service team, since this solution is all about the contractual obligations for reactive work and SLAs with the customer.

The service teams have a regular working schedule, typically based on the working hours defined by the linked **calendar**. Please note that without a calendar, the stand-by team can never be found.

**i** The structure of the **Teams** business object is important for **Allocation agreements** as the solution only uses specific system business objects from the base **Teams** business object, while it specifically rules out the preconfigured **Maintenance teams** from Accelerator. The following image shows the business object structure in Field definer, with the green boxes denoting the relevant business objects for **Allocation agreements**. The red box signifies that the user-defined **Maintenance team** business object should not be used in this solution:



Characteristics of a team:

- Linked to **Trade(s)**, to specify the team's competencies.
- Lists the engineers / technicians (in Planon: **Internal tradesperson**) who belong to this specific team.
- The linked team **Calendar** defines the working hours of the regular team and - as a 'by product' - the non-working hours covered by stand-by teams.

**i** a relevant **On-call team** must be defined for working schedules outside the regular office hours.

## 'Time to' KPIs in allocation agreements

As a service provider you are contractually obliged to meet the SLAs that you agreed with your customer. These are based on 'Time to' criteria, which are the KPIs (key performance indicators) for a service agreement.

The following 'Time to' KPIs can be used when working with allocation agreements:

- Time respond (TTR) - The time required to react to an assigned order.
- Time to attend (TTA) - The time required for an engineer / technician to be on site to investigate / fix the problem.

- Time to fix (TTF) - The time required to provide a solution. This solution can be temporary or permanent.
- Time to complete (TTC) - The time within which the order should be completed.

The deciding factor for allocating a stand-by team / team member to a work order is the 'Time to' criterion that is marked as the *primary* criterion. Stand-by teams are responsible for meeting the first criterion if non-regular working hours apply.

If the 'primary' time to is not found on the work order, the 'Time to' criteria that follow it are applied (in this order): TTA > TTF > TTC, until a value is found.

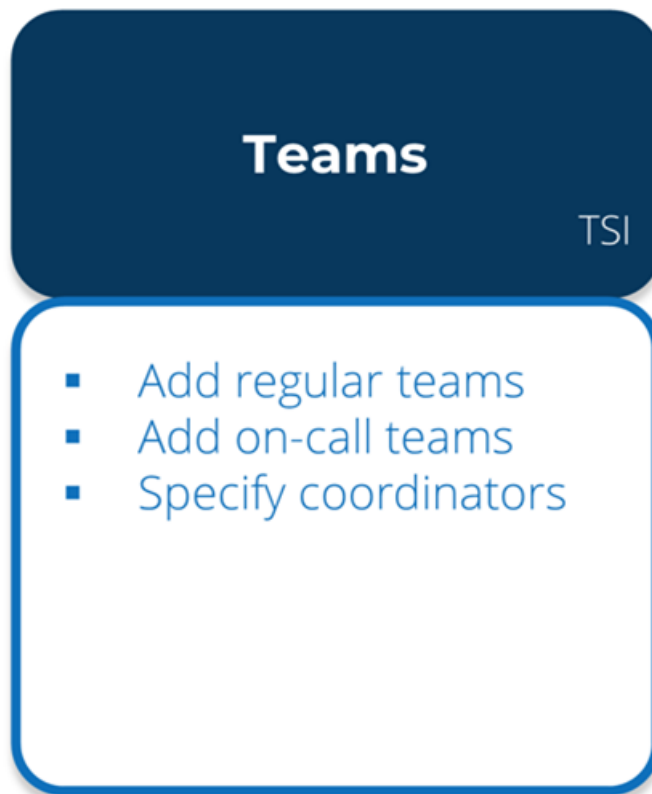
# Working with...

This section describes the various functions available.

## Configuration stages for Allocation Agreements

The configuration of team allocation agreements can be done in three separate stages.

Define Teams (regular and on-call)



Configure the Team allocation planboard

## Team allocation planboard

TSI

- Define schedules
- Select on-call teams
- Define planning periods
- Define team duty
- Define exceptions per team duty

Define allocation agreements on the customer contract

## Customer contracts > Allocation agreements TSI

- Add Allocation agreement on contract line
- Link teams
- Link on-call teams
- Add allocation thresholds

### Tasks for the team planner / team coordinator

If you, as team planner, want to configure *Dynamic order allocation* for teams and on-call teams, the following configuration tasks are relevant for you.

- [Adding a regular team](#)
- [Adding an on-call team and defining a schedule](#)
- [Scheduling on-call team duty](#)
- [Adding exceptions and replacements for on-call duty](#)
- [Copying and pasting on the allocation planboard](#)
- [Adding allocation thresholds](#)

#### Adding a regular team

In Planon ProCenter , you can add a 'regular' service team in two places:

- the **Teams** TSI
- the **Team allocation planboard** TSI

In this example you add the team in the **Teams** TSI.





The **Teams** TSI is an extended version of the existing **Maintenance teams** TSI, which does not support on-call teams. The two TSIs can be used alongside one another in the same environment.

### Procedure

1. On the navigation panel, go to Teams.
2. At the Teams selection level, click Add Team on the action panel.
3. Fill in a Code and Description.
4. In the Calendar field, select the relevant calendar for the team.



For more information on configuring calendars refer to *System settings > Calendars*.

5. On the action panel, click Save.
6. On the action panel, select the Link trades action.

#### **The Link trades dialog opens.**

7. In the dialog, select the trades you want to link to the regular team.

**The linked trades are used as criterion to find the right on-call team on an order.**

8. Click OK to confirm and close the dialog.
9. Go to the Team members selection level.
10. On the action panel, click Add role players - personnel.
11. On the data panel enter a Code, Description, Start date and (optional) End date for the team member.
12. In the Role and Person fields, link the relevant role and person to the team member record.
13. Click Save.
14. Add more 'regular' team members to the team as required.

## Adding an on-call team and defining a schedule

In Planon ProCenter , you can add an on-call team in two places:

- the **Teams** TSI
- the **Team allocation planboard** TSI

In this example you add the team and a schedule via the **Team allocation planboard** TSI.  
See also: [Allocation planboards](#).



This TSI is exclusive to the **Service Providers solution mode**.

### Procedure

1. On the navigation panel, go to Team allocation planboard.

**If no on-call teams are defined yet, the On-call teams dialog opens. If on-call teams already exist, click the **Select team ...** menu at the top right of the plan board, followed by the **Edit on-call teams** button.**

2. On the action panel of On-call teams dialog select Add on-call team.
3. Enter a unique Code and Description for the new on-call team.
4. In the Coordinator field, select the person who will be ultimately responsible for picking up the work of the on-call team.
5. In the No. of persons per shift field, enter the appropriate number of people that can be scheduled per shift.

**The maximum is 8.**

6. On the action panel, click Define on-call team schedule to define a new schedule or to edit an existing one.
7. At General select one of the following options:
  - **Start schedule from** - this is the default option if no previous schedule exists.
  - **Replace schedule from** - this option becomes available if a schedule already exists. The current date is selected by default, but you can edit it. The existing schedule is ended on the date a new schedule starts. Any linked **Planning periods, On-call team duty** and **'On duty' exceptions** are shortened or deleted, based on the **End date-time** of the existing schedule.
  - **Replace whole schedule** - this option also becomes available if a schedule already exists.



Selecting this option will completely delete the existing schedule of the on-call team! It might only be useful in cases that require such a drastic schedule replacement.

**At Planning period frequency, the Weekly option is selected by default; this option can currently not be edited.**

8. At Handover period, select the week day and the time when the handover should take place between the on-call team and the regular team.



If the **Start date-time** of the schedule deviates from the **Handover day/time**, you will create one planning period that is shorter than a week. See [Schedule for on-call team allocation](#).

9. Click OK.
10. On the action panel, click Link on-call team members.

**If this link, or any of the other links mentioned in this procedure is not available on the action panel, your system administrator can add it in the **Layouts TSI**. See [Layouts](#).**

11. In the Personnel dialog, at Set date and modification type, select Add links.
12. Select a start date for the link(s) and, optionally, an end date.

**This makes these links 'reference date aware'.**

13. Click OK.
14. At Select personnel, link the relevant on-call team members and click Close.
15. On the action panel, click Link trades.
16. In the Link trades dialog, select the relevant trades for this on-call team.

**The linked trades are used as criterion to find the right on-call team on an order.**

17. On the action panel, click Save and Close.

**If there are multiple teams that do not need access to each other's schedules, you can, at this point, further restrict access to an on-call team's schedule. This extra authorization per user group or user is optional. If no user groups or users are linked to an on-call team schedule, the standard authorization applies.**

18. On the action panel, click **Link user groups** and / or click **Link users** to link specific user group(s) and / or users to the on-call team and click **OK**. The schedule of a selected on-call team will only be visible to logged-in user groups / users.

**The on-call team is now configured and can be linked to an allocation agreement. If no previous schedule exists, an 'empty' team schedule has now been created. You must still add on-call duties on the planboard per individual on-call team member, along with any exceptions due to leave of absence / unavailability.**



To speed up data entry, you can select an existing scheduled period and then copy and paste it to the required position on the planboard. See **Copying and pasting on the allocation planboard** for more information.

## Scheduling on-call team duty

Preparation: You have created an on-call team and a schedule as described in: [Adding an on-call team and defining a schedule](#).

Procedure

1. Go to the Team allocation planboard TSI.
2. In the top right corner of your screen, click the Select team ... button.
3. Select the on-call team for which you want to schedule *on-call duty*.
4. On the planboard, hover over the top row in an empty planning period and left-click.

**The on-call team members are listed in order of their priority.**

5. Select the team member you want to schedule as first on call.

**This person is scheduled as first on call in this planning period.**

6. Repeat this action for the second and third row, and so on, until you have scheduled all on-call team members.
7. Repeat the procedure for any other planning periods, as required.

**You can now proceed with adding any exceptions and replacements to the scheduled on-call duties.**



To speed up data entry, you can select an existing on-call duty record and then copy and paste it to the required position on the planboard. See [Copying and pasting on the allocation planboard](#) for more information.

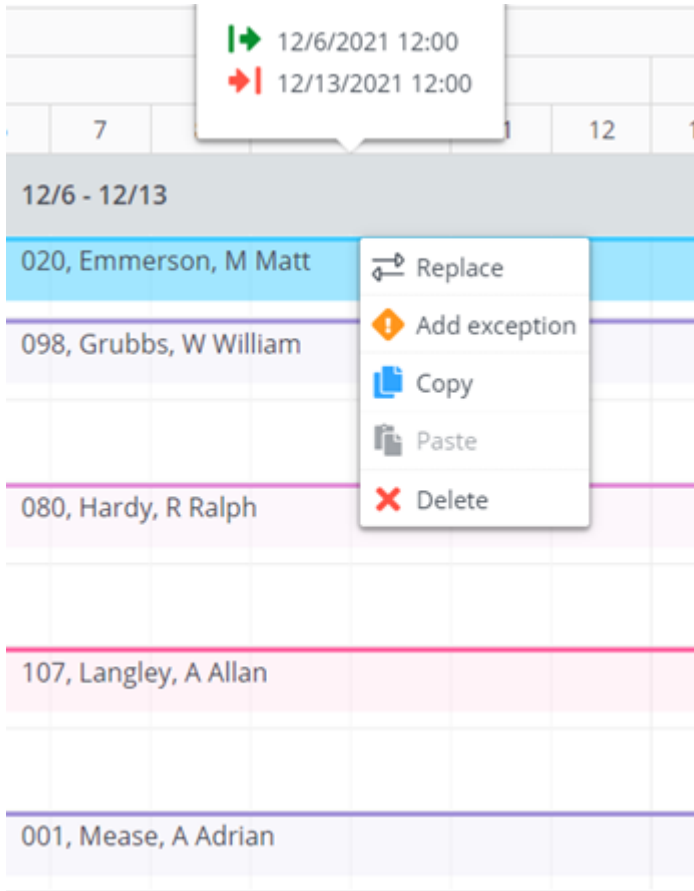
## Copying and pasting on the allocation planboard

On the team allocation planboard, you can copy and paste existing scheduled periods or on-call team duties to save you the trouble of repetitively entering data.

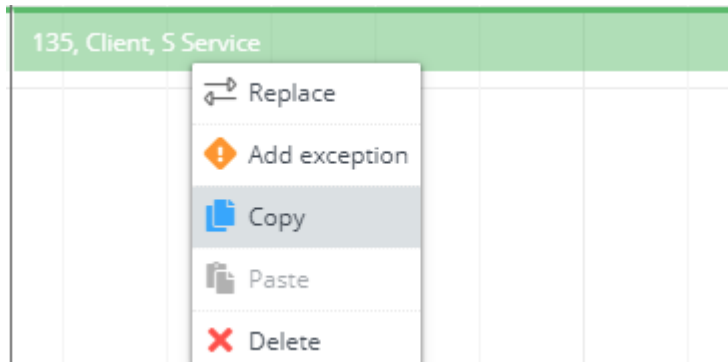
### Procedure

1. Go to the Service Providers' team allocation planboard.
2. Right-click on the scheduled period's *header* to select and copy a scheduled period, ...
3. ... or right-click on the on-call duty *record* to select and copy a single duty record.

#### Copying a selected scheduled period:



Copying a selected on-call duty record:



4. From the context menu, select Copy.

**The scheduled period / on-call duty record is placed on the clipboard.**

5. Go to the position on the planboard where you want to paste the scheduled period / on-call duty record.

**Use the Select a date, Previous or Next toolbar options to navigate to the targeted period. You can only paste the clipboard's content into the targeted period if there is enough room.**

6. Right-click and select Paste.

Use the **CTRL** and **SHIFT** keys to **multi-select** periods / records for copying and pasting. When multi-copying, empty periods / duty records will not be pasted. When pasting, gaps in the planning will be ignored and filled with the copied records.



You can only select on-call duties in the same period for copying, not across periods.

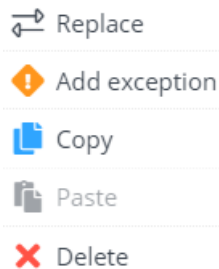
**By pasting the periods / records, you will overwrite any existing data.**

## Adding exceptions and replacements for on-call duty

Preparation: You have created an on-call team and a schedule as described in: [Adding an on-call team and defining a schedule](#). On-call duty has been scheduled for the team members as described in: [Scheduling on-call team duty](#). This procedure explains how you can add **exceptions** ( period of leave / absence) and **replacements** for a scheduled team member.

### Procedure

1. In Allocation planboards TSI, select the appropriate team schedule.
2. Hover over the team member for whom you want to add an exception to the on-call duty.
3. Right-click and select Add exception.



4. In the Edit exception dialog, select a Start and End date-time for the period of absence.

**If you select a very small period of only a few hours, this will be displayed as a tiny red dot on the planboard!**

5. In the Person field, select the team member who will be the replacement for the selected period.

### Edit exception ✕

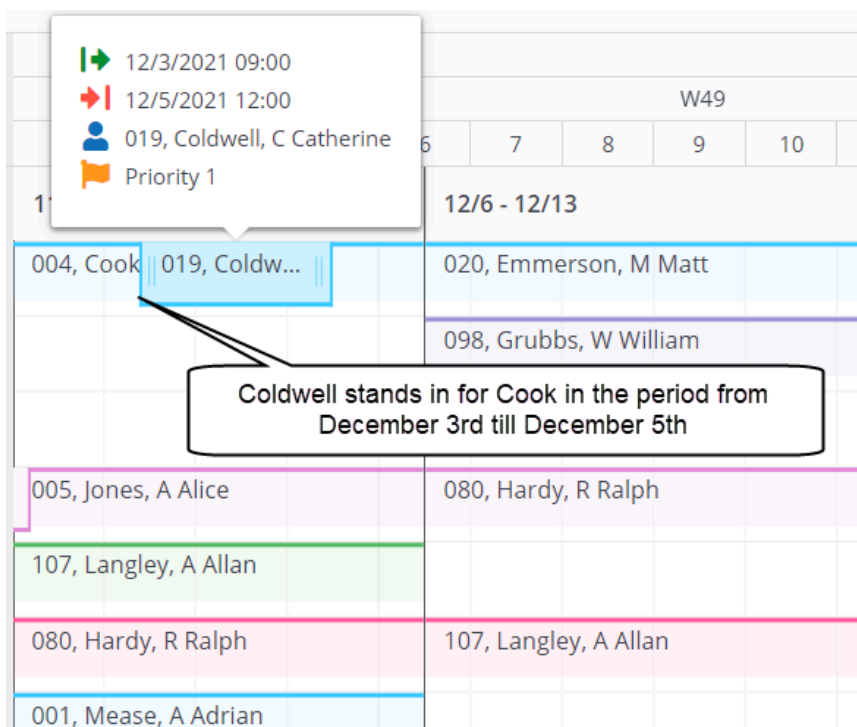
Start

End date-time

Person

6. Click Save.

**The exception is visible on the planboard. Hover over it to reveal the details. To edit or delete an exception, hover over it and right-click.**



7. You can also completely replace a team member for the whole planning period, by hovering over the record, clicking on Replace in the context menu and selecting the suggested alternative.

**The scheduled on-call team duty is applied when the back-office adds work orders for a contract with an allocation agreement that has links to this on-call team. It will detect the appropriate on-call team on the basis of order data that are filled in, as described in [Adding a specific allocation agreement](#).**

## Viewing team member information on the allocation planboard

The bottom panel of the allocation plan board displays information about the on-call team members, such as their availability, and it provides insight into the distribution of on-call duties and priorities across the team. Finally, it helps you identify any conflicts between scheduled on-call duties and a team member's availability, which makes rescheduling the duties and exceptions easier.

### Procedure

1. Go to the Service Providers' team allocation planboard.
2. At the top right corner of your screen, click the Select team ... button.
3. Select the on-call team whose *on-call duties* you want to view.

**The on-call team's allocation planboard is opened. The bottom panel shows information on the individual team members, which corresponds with the planning information on the planboard.**

The screenshot displays a complex interface for team allocation. At the top, there are two weekly grids labeled 'W48' and 'W49'. The 'W48' grid shows dates from 11/29 to 12/6, and 'W49' shows dates from 12/6 to 12/13. A legend on the right indicates dates and times: 12/14/2021 14:00 (green), 12/15/2021 04:00 (red), 098, Grubbs, W William (blue), and Priority 1 (orange). Below the grids, a list of team members is shown with their assigned duties. For example, '004, Cook' is assigned to '019, Coldw...' on 11/29-12/6, and '020, Emmerson, M Matt' is assigned to '12/6 - 12/13'. A bottom panel provides detailed information for selected team members, including '020, Emmerson, M Matt' (Priority 1), '098, Grubbs, W William' (Priority 2), '080, Hardy, R Ralph' (Priority 4), and '084, Jetton, S Sarah' (Priority 1). A dashed arrow points from a 'Priority 1' block in the grid to the 'Priority 1' entry in the bottom panel.

4. At the bottom panel, view the individual team members of the selected on-call team, their priorities and availability, on-call duties and exceptions.

**The information on a team member's availability is derived from the Personnel TSI > Details > Resource activities.**

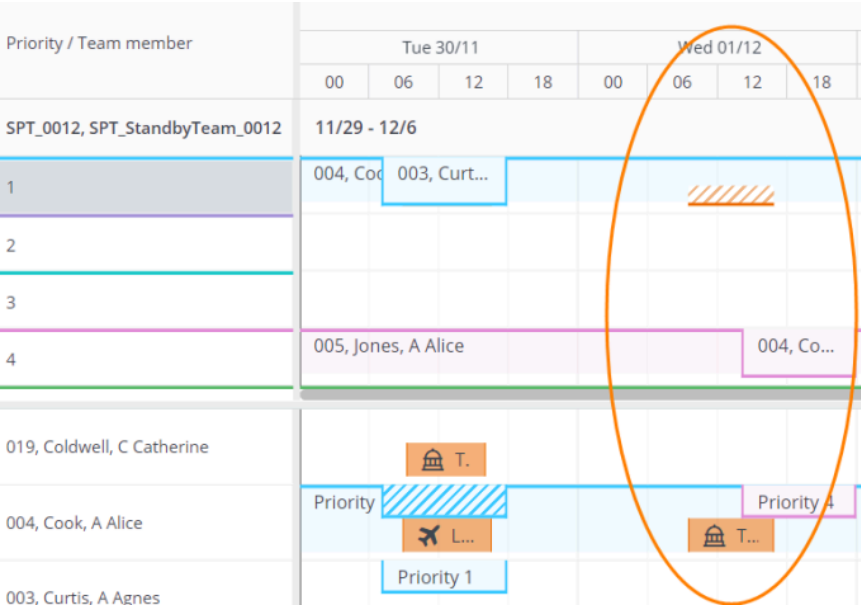


For more information on how to add unavailability records such as *Training* and *Holiday* for a person, see [Resource activities](#).

The following image displays that on December 1st, there is a clash between Alice Cook's *Priority 1* on-call duty on the planboard and her *Training* block in the bottom panel. There is an additional conflict with a *Priority 4* replacement



duty for Alice Jones. Rescheduling of on-call duties and replacements might be required, because of these conflicts.



The following image shows an example without scheduling conflicts. In week 52, William Grubbs' on-call duty with priority 5 has an exception (replacement by Alice Cook). This means that if priority 5 is required at that time, Alice Cook will replace him during the period he is absent.

Priority / Team member	December 2021						
	W52						
	27	28	29	30	31	1	2
SPT_0012, SPT_StandbyTeam_0012	12	12/27 - 1/3					
1	00	020, Emmerson, M Matt					
2	he	019, Coldwe					
3	08	107, Langle					
4	00	080, Hardy,					
5	10	098, Grubbs, W Willia 004, Coo...					
6	08	005, Jones, A Alice					
019, Coldwell, C Catherine	2	Priority 2					
004, Cook, A Alice	1	Priority 5					
003, Curtis, A Agnes							
017, Emery, C Caroline							
020, Emmerson, M Matt		Priority 1					
098, Grubbs, W William		Priority 5					

5. Reschedule any duties and exceptions on the planboard as required.

## Adding an allocation group

An **allocation group** is an 'umbrella concept'. You can define one or more allocation groups to cover the most common situations that involve the dynamic assignment of a service team to a work order, within the corresponding customer contract(s).

1. Go to the Allocation groups TSI.
2. On the action panel, click Add.
3. Enter a relevant Code and Description for the allocation group.
4. In the Team field, select the regular service team that will be responsible in case of generic team allocations.
5. Click Save.
6. On the action panel, click Link on-call team, to link on or more on-call teams.

The allocation group can now be selected on a general allocation agreement, to cover all common team allocations within the associated customer contracts. See [General allocation agreement](#).

## Adding allocation thresholds

### Procedure

1. Go to the Allocation thresholds TSI.
2. On the action panel, click Add.
3. On the data panel, enter a code and description for the new set of allocation thresholds.
4. In the Start time threshold [...] and End time threshold [...] fields, enter the number of minutes by which you want to increase or decrease the working hours of the regular team for that specific 'time to ...' criterion.

See [Allocation threshold fields](#).

5. Click Save.

The Allocation threshold set can now be selected when adding / editing an allocation agreement.

## Tasks for the contract manager

If you, as contract manager, want to configure *Dynamic order allocation* for teams and on-call teams, the following tasks are relevant for you.


- Create a customer contract and add the applicable **Service agreement(s)**.

 See

- Add the appropriate **Terms for time** to the service agreement, to define the SLAs with the customer.

 See

- Add an allocation group that covers the most common, generic team allocations within the associated customer contract(s). See [Adding an allocation group](#).
- Add allocation agreements to the contract. See: [Adding a general allocation agreement](#) and [Adding a specific allocation agreement](#).

 When you copy a contract or contract line, you can choose to copy the linked allocation agreement and its linked data along with the contract / contract line, by selecting the applicable options in the **Copying** dialog. Copies of teams-related or 'on-call teams'-

related allocation agreements will also include the links with trades and service agreement services of these teams.

## Adding a general allocation agreement

Typically, you define an allocation agreement on a contract line of a customer contract. The purpose of this agreement is to determine which linked team is responsible to pick up a work order at a given time: the 'regular' team or the on-call team. The detection mechanism to find the right team is activated from the date-time when the work order was added (**Reported on** field). It is assumed that a default or [General allocation agreement](#) will cover the majority of cases with regard to team allocation.

### Procedure

1. Go to the Customer contracts TSI.
2. At Customers, select the relevant customer.
3. At Contracts, select the relevant customer contract.
4. At Service contract lines, select the relevant contract line.
5. Go to Contract agreements > Allocation agreements.
6. On the action panel, click Add General allocation agreement.
7. Enter a unique Code and Description for the agreement.
8. In the Contract line field, link a relevant contract line to the agreement.
9. In the Allocation group field, select the relevant allocation group.
10. In the 'Time to' criterion field select the relevant set of criteria by which you want have a team allocated to an order:
  - **TTR** - Time to respond
  - **TTA** - Time to attend
  - **TTF** - Time to fix
  - **TTC** - Time to complete
11. In the Allocation threshold field select the relevant, predefined set of thresholds that determine the crossover times between working hours and non-working hours.

**In the Allocation thresholds TSI you can define sets of allocation thresholds. In a set of Allocation thresholds, you can define start time thresholds and end time thresholds for all 'Time to' criteria. So if, for example, you select TTF in the 'Time to' criterion field, the Start time TTF threshold (in min.) and End time TTF threshold (in min.) will automatically detect the right team or on-call team for any work order added for the same customer contract line. See [Allocation thresholds](#) for more information on defining the thresholds.**

12. Click Save.

For cases that are not covered by the general allocation agreement, you must specify and link specific allocation agreements. See [Specific allocation agreement](#).

## Adding a specific allocation agreement

While it is assumed that a default or [General allocation agreement](#) will cover the majority of cases with regard to team allocation, it may be necessary to define a [Specific allocation agreement](#) for those cases where more precise 'tuning' is required.

The following types of **Specific allocation agreement** are available, listed in the *sequence* in which the appropriate regular and / or on-call team is detected upon adding a work order. That means that the specific allocation agreements use the hierarchy that is indicated below, giving priority to teams (and their associated trades and service agreement services) linked at the lowest level (allocation agreements for assets) over teams that are linked at higher levels.

- Contract line
- Location type
- Service location
- Space category
- Space
- Asset group
- Asset

### Procedure

1. Go to the Customer contracts TSI.
2. At Customers, select the relevant customer.
3. At Contracts, select the relevant customer contract.
4. At Service contract lines, select the relevant contract line.
5. Go to Contract agreements > Allocation agreements.
6. On the action panel, click Add [...] allocation agreement.

**Based on the information listed above, select the appropriate type of allocation agreement.**

7. Enter a unique Code and Description for the specific agreement.
8. In the Contract line field, link a relevant contract line to the agreement.
9. In the Allocation threshold field select a relevant set of thresholds, to define crossover times between the teams' working hours and non-working hours.

**In the Allocation thresholds TSI you can define sets of allocation thresholds. In each set of Allocation thresholds, you can define start time thresholds and end time thresholds for all 'Time to' criteria. So if, for example, you select TTF in the 'Time to' criterion field, the Start time TTF threshold (in min.) and End time TTF threshold (in min.) will automatically detect the right team or on-call team for any work order added to the same customer contract line. See [Allocation thresholds](#) for more information on defining the thresholds.**

10. Click Save.
11. On the action panel, click the relevant link actions:
  - Link property
  - Link team
  - Link on-call team

**The values you have selected in the previous steps are all used to detect the right team / on-call team when the back-office adds work orders that are associated with this customer contract (line).**

## Back-office proceedings

If you, as service desk employee, add a reactive work order while an allocation agreement applies to the customer contract, the following proceedings and mechanisms are relevant for you.

- [Adding an order with automatic detection of a team / on-call team](#)
- [Scenarios for on-call teams taking 'time-to' thresholds into account](#)
- [Finding on-call team members - create and run report](#)

## Adding an order with automatic detection of a team / on-call team

Precondition: Allocation agreements have been configured in your Service Providers environment. The **Service agreement service**, **Trade**, **Team** and **On-call team** fields have been added to the relevant layout(s) of the Work Orders TSI.

See for more information.

With the correct configuration of **Allocation agreements** in your Service Providers environment, the applicable regular team and the on-call team can be detected when you add a **work order** for a customer contract in the Work Orders TSI.

- The **On-call team members** selection step must be added to the Work Orders TSI to display 'on-call' team members to back-office personnel. Application managers can configure this step on the **Order details** level of all relevant Work Orders TSIs.
  - Team detection and allocation can only be applied to the order system types **work orders** and **PPM orders**. Be aware that 'On-call' team detection only applies to work orders and not to PPM orders.

The team detection mechanism in the back-office takes the following 'meta data' into account:

- the **Calendar** that is linked to 'regular' team,
- the **Allocation agreement(s)** linked to the applicable customer's contract line,

- the **Allocation thresholds** that apply to the allocation agreement,
- the on-call team's configuration on the **Team allocation planboard**, including *handover date-times*, the team members' *priority duty exceptions* etc.

In addition, the work order data you fill in (or leave blank), are used for the detection of the correct team / on-call team:

- Date-time you add the work order (= value in the **Original start date-time** field)
- Asset
- Space
- Property
- Contract line
- Customer
- Service agreement service with linked Terms for time
- Trade

## Procedure

1. Create a *work order / PPM order* with the mandatory fields filled in (Number, Order group, Property).
2. In addition, fill in any non-mandatory data; for example Customer and Service agreement service.

**The Trade, Terms for time and Contract line fields will be automatically populated based on this data.**

3. Click Save.

**The Original start date-time is now also populated. Based on this date and the team configuration data, the regular Team and, if applicable, On-call team (not applicable in case of a PPM order) are also detected and populated.**

4. When an on-call team comes into scope for a work order, based on the entered order data, find out which on-call team member(s) must subsequently be contacted.

**See [Scenarios for on-call teams taking 'time-to' thresholds into account](#) for various scenarios in which an on-call team needs to be contacted.**

5. Drill down from the relevant work order to the Order details > On-call team members selection step ...
6. ... or run a user-defined report.

**For more information on how to configure and generate a user-defined report with the relevant on-call team members, see [Finding on-call team members - create and run report](#).**

If you fill in the **Trade** instead of the **Service agreement service**, the right team and on-call team can be detected through the link between the trade and the team that has been configured on the applicable allocation agreement.

## Scenarios for on-call teams taking 'time-to' thresholds into account

There are many configuration options for on-call teams, resulting in different scenarios for back-office staff.

The following examples represent some possible scenarios for on-call teams. Some of them take into account threshold configurations for the various 'time-to' criteria.

Be aware of the following:

- If the moment the work order is added (**Reported on field**) is *within* working hours, or
- if the 'time-to' criterion falls within working hours, or
- if there are any working hours in between those two moments,

the work will always be the responsibility of the 'regular' team. Regular working hours are displayed as blue blocks in the examples. An on-call team will not be assigned to the work order in these cases.

The on-call team is only assigned if the moment of adding the work order and the 'time-to' criterion both fall in an uninterrupted, non-working period. These are the orange blocks in the examples.

**i** Although it is unlikely that you will configure thresholds on all 'time-to' criteria for a single on-call team, the following cases give an example of each (TTR, TTA, TTF and TTC) and one example where no thresholds apply.

Case 1 - No thresholds On-call team available for orange blocks



In case 1, there is an on-call team linked to the regular team that is linked to the allocation agreement. There are no 'time-to' thresholds configured. So the handover from regular team to on-call team is clear-cut and there are no transition periods.

Case 2 - Thresholds for TTR: Start = 15 minutes End 30 = minutes On-call team available for orange blocks



In case 2, a threshold is defined for the 'time to respond', with an *additional* transition time of 15 minutes at the start of the regular team's shift and 30 minutes at the end. The regular team is responsible for responding to the issue in the blue time blocks.



Case 3 - Thresholds for TTA: Start = 45 minutes End 45 = minutes On-call team available for orange blocks



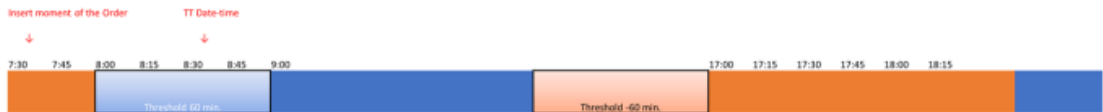
In case 3, a threshold is defined for the 'time to attend', with a transition time of an *additional* 45 minutes at the start of the regular team's shift and 45 minutes at the end. The regular team is responsible for attending to the issue in the blue time blocks.

Case 4 - Thresholds for TTF: Start = -15 minutes End = -30 minutes On-call team available for orange blocks



In case 4, a threshold is defined for the 'time to fix', with a *reduced* transition time for the regular team of 15 minutes at the start of the shift and of 30 minutes at the end. The on-call team is responsible for fixing the issue in the orange time blocks.

Case 5 - Thresholds for TTC: Start = 60 minutes End = -60 minutes No on-call team



In case 5, a threshold is defined for the 'time to complete', with an *additional* transition time for the regular team of 60 minutes at the start of the shift and a reduced transition time of 60 minutes at the end. The regular team is responsible for completing the order in the blue time blocks, while the on-call team is responsible for completing the order in the orange time blocks.

## Finding on-call team members - create and run report

You can find the right on-call team members by selecting the order in the **Orders** TSI, and drilling down to Order details > On-call team members. However, you may also find it convenient to run a report listing the relevant team members and their team coordinator for a work order. In that case, you can define and run a user-report.

The following procedure shows how you can *configure* and *generate* a user-defined report that lists on-call team members by their priority.

### Procedure

1. Go the Work Orders TSI.
2. On the action panel, click Report.
3. In the Reporting dialog, on the action panel, click Add.
4. In the Report definitions and settings dialog, on the Settings panel, enter a Name and (optional) Title for the report.

5. At Options for grouped report, make settings with regard to the report's layout.
6. Make sure that the option Show business objects that refer to the active business object is enabled.
7. At Available fields, select the order fields Number and Description and move them to Selected fields.
8. At Available fields, select the Orders for on-call team members reference field.
9. At Selected fields, click the Add sub-report button.
10. Move the sub-report down to the required position.
11. At Available fields, double-click the On-call team member reference and add relevant fields, such as Code, First name, Surname and Priority.
12. Click OK.
13. In the Reporting dialog, at Print options, set the Print only selected element(s) field to Yes.
14. With a relevant 'on-call team' work order selected, click Preview & print.
15. The report is generated and displays the on-call team members listed by their priority.



The on-call team members' priority data is derived from the data on the allocation planboard, for the applicable planning period (shift). The date the work order is added (the 'insert-date time' displayed in the **Reported on** field) is also crucial in determining the on-call priority.

**The team member with the highest priority (1) can now be contacted. Work down the priority list if the person with the highest priority cannot be reached. If the on-call team has a coordinator, this person is ultimately responsible for complying with the SLA with the customer. Although coordinators are always displayed at the top of the list with priority 0, they should be contacted as a *last resort*, if none of the other team members can be reached.**

# Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

## Allocation threshold fields

---

<b>Field</b>	<b>Description</b>
Code	Enter a code for the set of allocation thresholds.
Name	Enter a relevant name for the set of allocation thresholds.
Start time threshold TTR / TTA / TTF / TTC (in min.)	Enter the number of minutes with which to increase or decrease the start time of the working periods of the regular team if TTR / TTA / TTF or TTC is the selected 'time to' criterion on the allocation agreement. Enter a positive number of minutes to increase and a negative number to decrease. The maximum range from which you can select is between 120 minutes and -120 minutes.
End time threshold TTR / TTA / TTF / TTC (in min.)	Enter the number of minutes with which to increase or decrease the end time of the working periods of the regular team if TTR / TTA / TTF or TTC is the selected 'time to' criterion on the allocation agreement. Enter a positive number of minutes to increase and a negative number to decrease. The maximum range from which you can select is between 120 minutes and -120 minutes.

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