INDEX

JTDP PHASE 1: WORKBOOK

FIELD SERVICE ESSENTIALS: TRAVEL & ADMINISTRATION

Field service administration and on-the-job training.

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FIELD SERVICE
ESSENTIALS

FIELD SERVICE ESSENTIALS

This training module was designed to give junior technicians a comprehensive understanding of the essential administrative functions performed daily by experienced service technicians in the field.

Coursework in this module will consist of theoretical and procedural content, practical demonstration and simulated exercises. By the end of this phase, junior technicians will be fully prepared to handle all administrative duties while in the field.

COURSE INFORMATION


ADMINISTRATIVE
BURDEN

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Syllabus

In this phase, Junior Technicians will gain a comprehensive understanding of the essential administrative functions required in the role of a Field Service Technician at INDEX. This phase introduces the foundational concepts of field service administration, with a focus on travel logistics, customer requirements, and all administrative tasks critical to the role. The primary goal is to immerse Junior Technicians in the "field" environment and familiarize them with the various administrative duties they will encounter in real-world scenarios.

The phase will be structured with a clear, standardized format, where each topic is broken down into focused lessons, each designed to achieve specific learning objectives. Each lesson will begin with a lecture that introduces the theoretical and procedural content, followed by practical demonstrations to ensure hands-on understanding. Junior Technicians will also engage in exercises to reinforce the concepts learned. This combination of theory and practice will help ensure a comprehensive understanding of field service administrative tasks.

Upon completion of this phase, Junior Technicians will be proficient in completing an INDEX service report independently, understanding its structure and essential components. They will also be equipped with the knowledge and skills to accurately document their time worked in Paycor, submit an expense report via SAP Concur following INDEX's guidelines, and book travel according to company policies and procedures. Additionally, they will understand how to navigate the different administrative processes, such as submitting and tracking expenses and travel arrangements.

Throughout the phase, Junior Technicians will receive personalized mentorship and feedback, ensuring they are fully supported in honing their administrative skills. Mentors will guide them to achieve the highest standards of administrative excellence and prepare them for success in the field.

By the end of this phase, Junior Technicians will be fully prepared to handle all administrative duties, allowing them to effectively support their work in the field. This phase will equip them with the foundational skills and confidence necessary to move forward in their training and take on more complex field service tasks.

Prerequisites

- INDEX-provided laptop
- Account in Paycor
- Account in SAP Concur
- Account in Field Service Management (FSM)

Applicable Machine Types

All INDEX machines regardless of series

Learning Objectives

Field Service Administration

Service Reports

Understand the purpose and significance of a Service Report within the field service process.

Distinguish between a well-written Service Report and a substandard one based on quality standards.

Identify and understand the essential components that must be included in every Service Report.

Articulate the purpose of Daily Updates and outline the necessary information they should contain.

Apply knowledge by completing a Service Report and Daily Update that meet required standards.

Timesheets

Acknowledge the importance of precise and accurate time tracking for field service work.

Understand the correct process for recording time worked in the system.

Recognize the expectations for time documentation during both training at the INDEX Noblesville location and on-the-job training (OJT) in the field.

Expense Reporting

Locate and understand the Travel Expense Policy for proper reporting.

Grasp the purpose of an Expense Report and the requirements for accurate documentation.

Identify the necessary components that ensure a complete and correct Expense Report.

Demonstrate the ability to effectively create, complete, and submit an Expense Report in compliance with company guidelines.

Booking Travel

Understand and follow the procedures for booking travel in alignment with company policies.

Evaluate multiple travel options and select the most appropriate choices based on company requirements.

Field Service On-the-Job Training (OJT)

Effectively manage the demands of extensive travel, demonstrating the ability to navigate logistical challenges and maintain professionalism in various work environments.

Apply classroom learning to real-world field scenarios, gaining practical experience in the role under supervision and mentorship.

Assessments

Complete a written exam demonstrating a thorough understanding of field service administration responsibilities and processes.

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Safety: First, Last and Always

At INDEX, your safety is our highest priority. While we are committed to creating a safe working environment, it's important to recognize that the nature of machine tool work comes with inherent risks. Caution, awareness, and adherence to safety protocols are essential whether you're on the shop floor in Noblesville or at a customer site in the field.

Below is a list of common safety considerations. This list is not exhaustive but serves as a general guide to help you stay vigilant and reduce risk in your daily activities:

General Safety Guidelines

1. Personal Protective Equipment (PPE):

Always wear appropriate PPE, such as safety glasses, steel-toe boots, gloves, and ear protection, as required by the job or location.

Ensure your PPE is in good condition and fits properly.

2. Work Area Awareness:

Keep your workspace clean and organized to prevent tripping hazards.

Be aware of your surroundings, including the location of emergency exits, fire extinguishers, and first aid kits.

3. Machine Operation:

Follow all lockout/tagout (LOTO) procedures before performing maintenance or troubleshooting on equipment.

Inspect machines for visible damage or issues before use and report any concerns immediately.

4. Hazardous Materials and Chemicals:

Familiarize yourself with Safety Data Sheets (SDS) for any chemicals or coolants you may encounter.

Use proper handling and storage techniques to avoid spills or contamination.

5. Electrical Safety:

Exercise caution when working with or around electrical systems.

Always verify power is off before performing electrical work.

Use insulated tools and follow proper grounding procedures.

Field-Specific Considerations

1. Customer Site Hazards:

Each site may have unique risks, such as uneven flooring, limited lighting, or confined spaces. Conduct a quick assessment upon arrival.

Follow the customer's site-specific safety protocols and communicate with the designated safety officer or point of contact.

Attention should be paid to the floor around the machine as there is likely to be oil residue on the floor from machine operation and could pose a slip hazard.

2. Travel Safety:

Plan your travel routes and accommodations with safety in mind.

Ensure you have emergency contact numbers and are familiar with local emergency services at your destination.

3. Environmental Conditions:

Be prepared for varying conditions, such as extreme temperatures, noise, or dust.

Hydrate regularly and take breaks as needed to avoid fatigue.

Ongoing Safety Practices

Training and Refreshers: Stay up to date on safety training and certifications.

Report Hazards: Immediately report unsafe conditions or incidents to your manager.

Continuous Vigilance: Safety is a shared responsibility. Remain proactive and encourage others to do the same.

This machine contains Voltage dangerous to life. Use caution when working on electrical components.

Slip hazards are present due to oil spillage. Use caution when working near any hydraulic or coolant components to prevent slips that could result in serious injury.

Service Reports: An Essential Skill

Service reports are a critical aspect of a Field Service Technician's role and require consistent practice to master. During your time in the field, you will be expected to complete a service report each week to build and refine this skill.

The definition of a service report can vary from company to company, but all service reports adhere to a fundamental purpose: to document the work completed by field technicians at a customer site. At INDEX, we define a service report as:

"A formal document that outlines the scope of work to be completed and provides a detailed record of every aspect of the Field Service Technician's activities for an assigned job."

In simpler terms, a service report answers the key questions of any task which are?

Service reports serve multiple purposes:

For the Customer: They provide a clear summary of findings, the work performed, any further recommendations (e.g., repairs or parts), and the associated costs.

For INDEX: They serve as a record for financial and technical references, ensuring continuity and accuracy if another technician needs to address related or unrelated issues in the future.

At INDEX, we use **SAP** for financial record-keeping and **Field Service Management (FSM)** software to create and deliver service reports to customers. Training on FSM will be provided by the customer service team. Weekly completion and submission of service reports are required to help you develop the skills necessary to fill them out correctly and efficiently.

These reports are as important to INDEX as they are to the customer. They act as:

1. **Technical Records** – Detailing all work performed, providing continuity for follow-up visits or problem resolution.
2. **Cost Records** – Offering a clear breakdown of services provided and associated charges.

Additionally, if issues persist, service reports provide the customer and service manager with a documented history to aid in discussions and problem resolution.

Finally, a service report is only considered complete when it is:

1. **Accurately Filled Out**
2. **Presented to the Customer**
3. **Signed by the Customer**

By mastering this essential skill, you ensure clear communication, proper documentation, and professional service delivery.

Service report

Client:	RMS Company	**Service order 4186898**	
recipient:	RMS Company	Service notification:	000301647963
	Evergreen Blvd 8600	transaction number:	0010
	US 55433 Minneapolis	Machine no.:	275363
		Techn. object:	-
		Series:	MS22C-8 (7706-04)
Contact person:	Randy Moon (rmmoon@machine.com)	Inst. no. customer:	-
		End of warranty:	11/28/2020
Order no.:	W219100	Respons. person:	Russell Dumis (rdumis@index-usa.com)
		Serv. technician:	Solomon Xiong
FIRE DOOR FOR MIST COLLECTOR			

The top of the report is divided into three major sections: **Customer Information, Service Order, and Scope of Work**. Each section contains important details required for accurate documentation and communication.

1. Customer Information

Client: ______________________________

Recipient: The person or entity for whom the work is being performed, including the address you need to travel to for the service.

Contact Person: ______________________________

Order Number: ______________________________

2. Service Order

Service Notification: A unique number automatically generated by SAP when a service request is received by Lori or Keith in Noblesville.

Transaction Number: ______________________________

Machine Number: ______________________________

Series: ______________________________

End of Warranty: ______________________________

Response Person: ______________________________

Service Technician: ______________________________

3. Scope of Work

This section outlines the specific issues or tasks you are at the customer site to address. It defines the scope of the service being provided and serves as a guide for the work to be completed.

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Activities

Monday, 9/23/24
0800, MS22-8, 275363

- Matt O. said during the 5th shift, the panel was powering off and that there was a hot fire smell at the bar loader electric cabinet
- I have informed them about the panel only turning off when swinging pass the frontside door and will check the cables after the Synchron alignment
- Fire smell: I checked the machines electric cabinets, bar loader's, chiller's, knoll pumps', and the bar loader's drill; all were good with no burn marks or irregularities
- Completed safety startup and travel to ref., attempted to jog Synchron and Alarm: "761961 Fire Protection Flap, closing not complete" appears every 5 seconds and prevents jogging/cycle/operation

o Found the fire protection flap and looked up the IO sensors, found that the bit values for the fire damper open and close is both 0: Q176.5 and i176.6, the sensor is not detecting wither the flap is open or closed

o Checked the solenoid and cable, noticed that there was no light from the ProfiBus module for the cable, the solenoid had no lights on and was loosely connected, I retighten the solenoid after checking for any damage

o I noticed the sensors that detects if the flap is open or close are not on, after adjusting the mechanical arm, the sensor for "open" turns on and is reflecting in the output of the HMI, adjusted the solenoid to be normally closed like the rest of the MS22 here; alarm is resolved

Machine running time (automatic on) :

Machine running time (automatic on) :
39601

~~**Test run successfully completed**~~

Test run successfully completed

Job is completed

Time Efforts

Date	Time Efforts in Hours	Waiting Time in Hours	from	to	Task
Mo. 09/23/2024	4.33	0	08:00 AM	12:20 PM	work hours
SUM	**4.33**	**0**			
SUM total	**4.33**				

<u>**Confirmation of labor hours and travel time:**</u>

The specified labor hours will be confirmed by us. The calculation of the service work is carried out according to the valid service price list and the service conditions. The work was carried out to our satisfaction and the machine was accepted in working order:

Minneapolis	09/24/2024	
Place	Date	Signature customer: Randy Moon

The bottom half of the Service Report is divided into five major sections, each requiring varying levels of effort and attention from the Field Service Technician.

1. Activities

This section is critical for documenting the events that occurred on-site. Field Service Technicians who maintain a daily log excel at completing a detailed and accurate summary of their activities here. Clear and concise communication in this section sets standout performers apart and ensures effective collaboration with Field Service Management in Noblesville.

2. Machine Running Time

Record the machine's running hours as displayed on the ______________________ at the time the scope of work is completed. This information is essential for tracking machine usage and service intervals.

3. Job Completion Status

In FSM, you will indicate whether the scope of work is complete by checking the appropriate box. Note that not every job can or will be completed on the first visit, so it's important to provide an accurate status update.

4. Time Efforts

In FSM, you will log both travel time and time worked. However, this section of the report only displays the time worked. Ensure that this information is precise and aligns with the efforts documented in the report.

5. Signature Line

Place of Customer: ____

Date and Signature: ____

This is arguably the most important part of the Service Report. Without a customer's signature, the work performed or the time spent on a task can be disputed. This could put INDEX in a challenging position when attempting to bill for services rendered. Always ensure the customer signs the report to finalize the documentation.

By thoroughly and accurately completing each of these sections, you ensure the Service Report is a reliable record of the work performed, benefiting both INDEX and the customer.

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ACTIVITY:

Can you identify the errors in the example below?

Monday 9/23/24

0800, MS22-8, 275363

-Matt O. said during the 5th shift, the panel was powering off and that there was a hot fire smell at the bar loader electric cabinet

-I have informed them about the panel only turning off when swinging pass the frontside door and will check the cables after the Synchron alignment

-Fire smell: I checked the machines electric cabinets, bar loader's chiller's, knoll pumps', and the bar loader's drill; all were good with no burn marks or irregularities

-Completed safety startup and travel to ref., attempted to jog Synchron and Alarm: "761961 Fire Protection Flap, closing not complete" appears every 5 seconds and prevents jogging/cycle/operation

-Found the fire protection flap and looked up the IO sensor, found that the bit values for the fire damper open and close is both 0; Q176.5 and i176.6, the sensor is not detecting wither the flap is open or closed

-Checked the solenoid and cable, noticed that there was no light from the ProfiBus module for the cable, the solenoid had no lights on and was loosely connected, I retighten the solenoid after checking for any damage

-I noticed the sensors that detects if the flap is open or close are not on, after adjusting the mechanical arm, the sensor for "open" turns on and is reflecting in the output of the HMI, adjusted the solenoid to be normally closed like the rest of the MS22 here; alarm is resolved

Service Reports: A Critical Record of On-Site Activities

Service reports serve as the sole documentation of your activities on-site. As such, they must be complete, clear, and concise to ensure they effectively communicate the necessary information.

1. Complete

A complete service report includes:

- Detailed documentation of all mechanical, electrical, hydraulic, pneumatic, and control-related settings.
- A log of time spent on each problem, including specific days and times.
- A list of parts used, parts needed, or parts ordered.

2. Clear and Concise

- The information in your report must be easily understood by both trained and untrained audiences.
- Avoid overly detailed or expansive descriptions that can confuse readers unfamiliar with CNC repair.
- Focus on key points and avoid explanations of concepts or theories—stick to the essential facts.
- Use list formatting for daily activities to convey activities completed.
- Use paragraphs for anything you want the INDEX management team to read as a priority.

3. Professionalism Matters

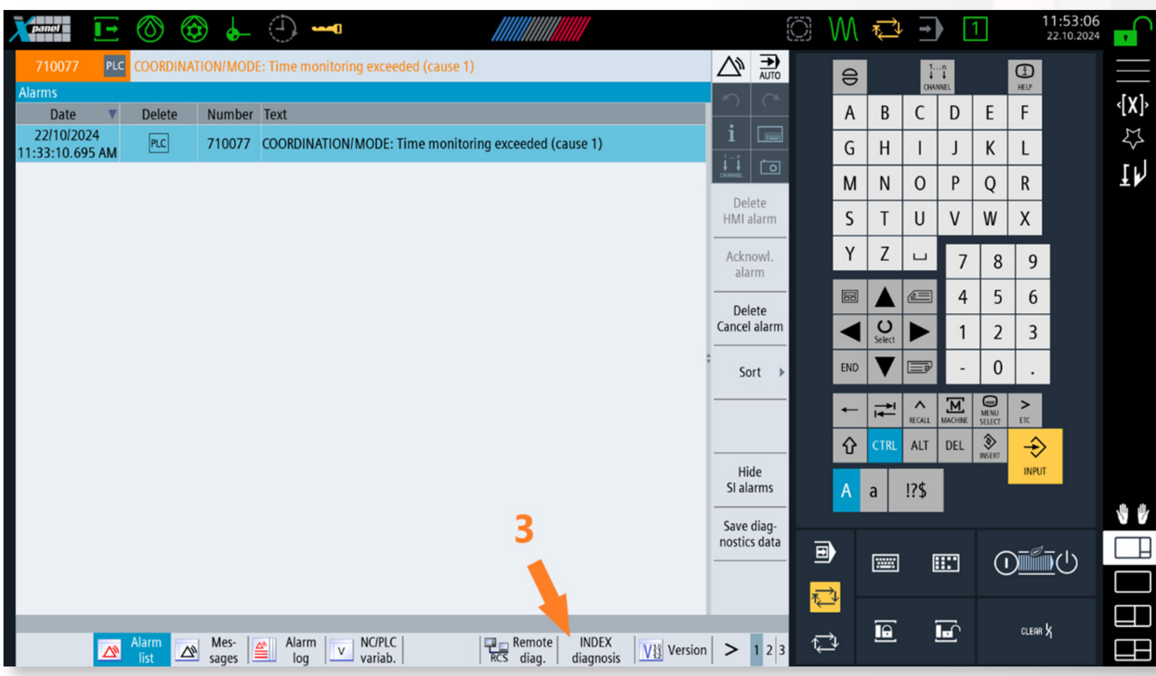
- Service reports are reviewed at _______ level of the INDEX organization. Always maintain a professional tone and ensure the content reflects your expertise and attention to detail.
- By following these guidelines, your service reports will effectively convey the necessary information while maintaining professionalism and clarity.

Service Reports: Machine Running Time

On your Service Report for Machine Running Time you need to put the time you found on the HMI depending on the Model of Machine your working on be it a Single Spindle or Multi-Spindle. Only the hours is required minutes and seconds are not necessary.

Service Reports: Machine Running Time

SINGLE SPINDLE MACHINE



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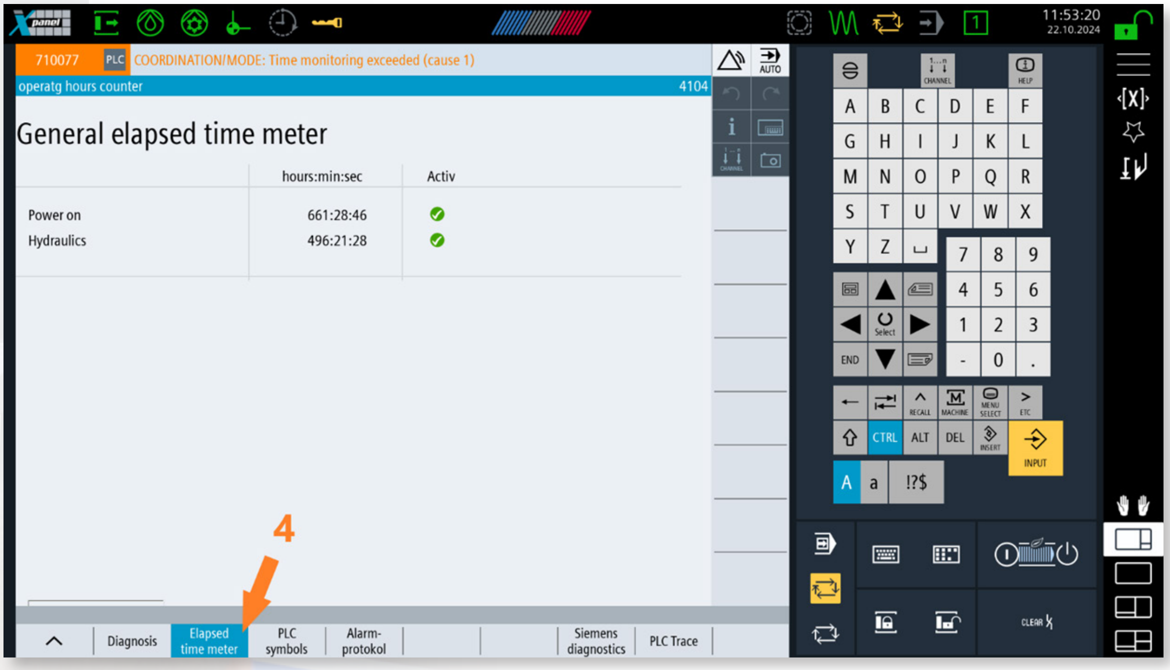

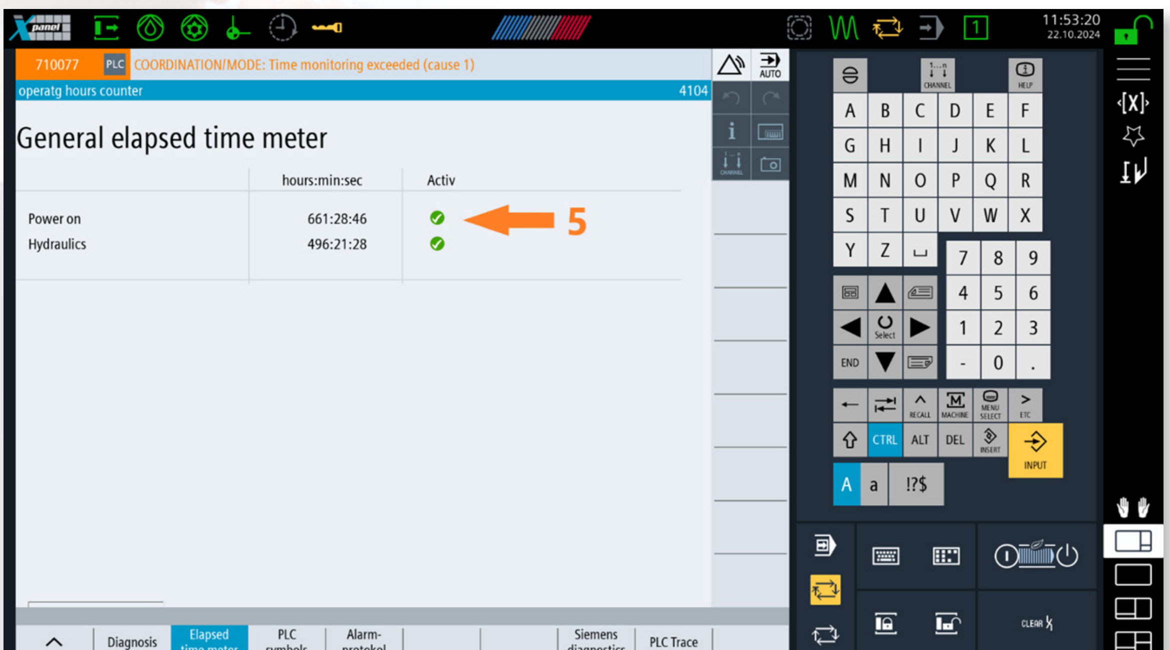

1. Press MENU SELECT
2. Press DIAGNOSTICS
3. Press INDEX DIAGNOSIS
4. Press ELAPSED TIME METER
5. Press RECORD POWER ON

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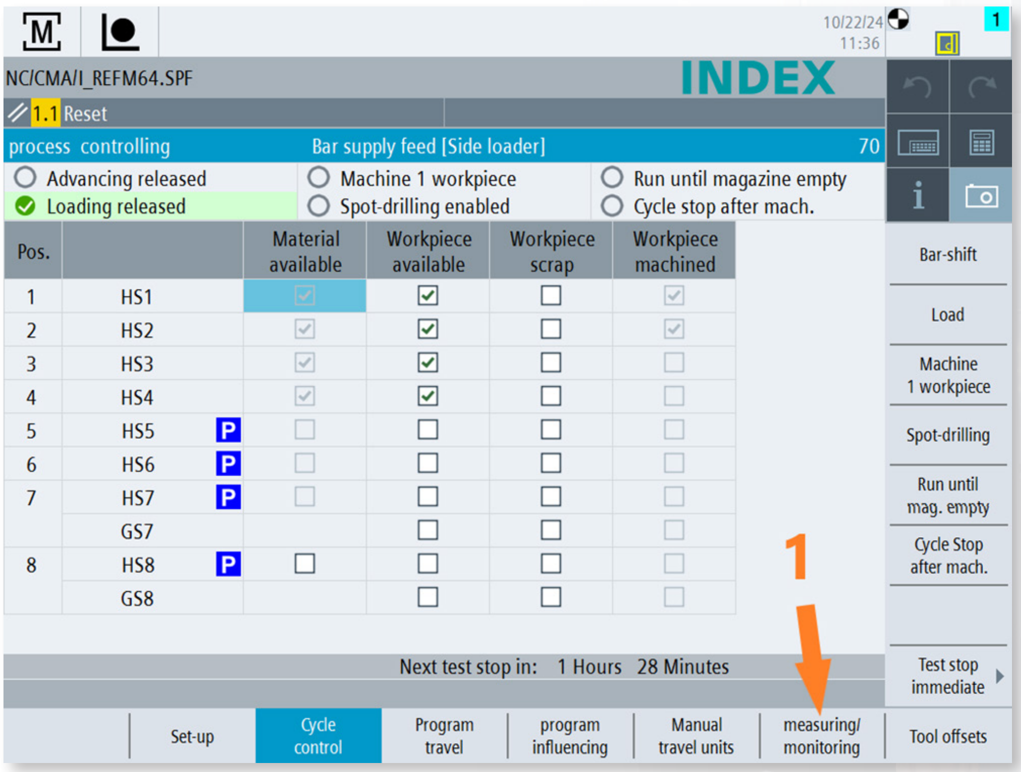
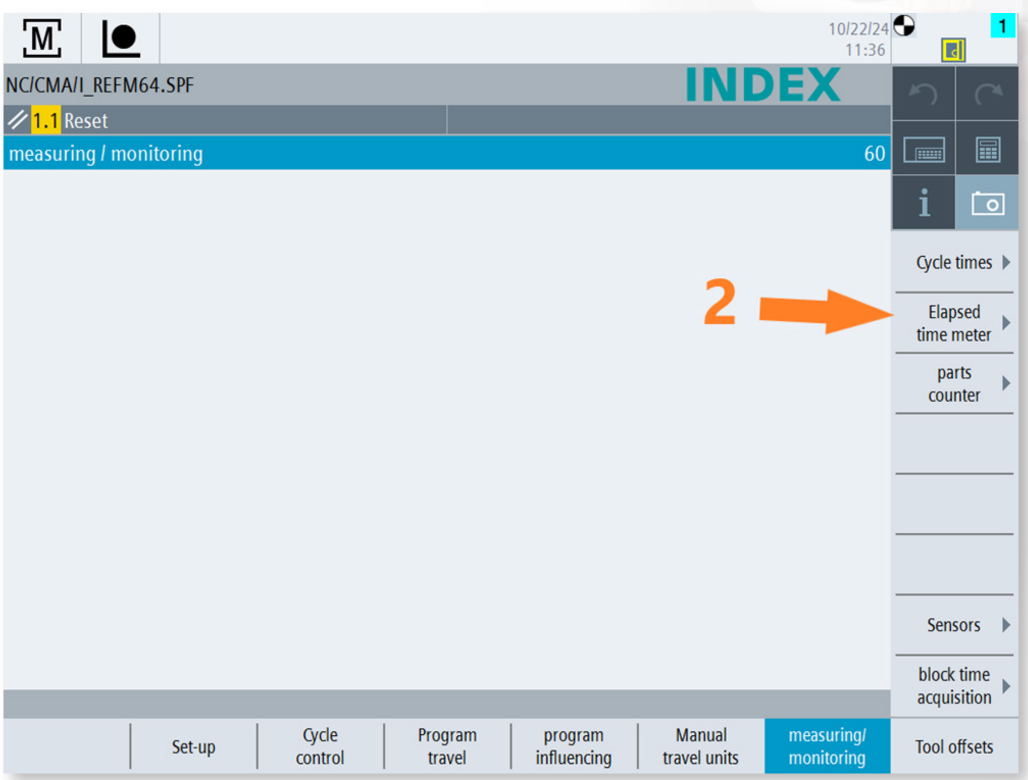
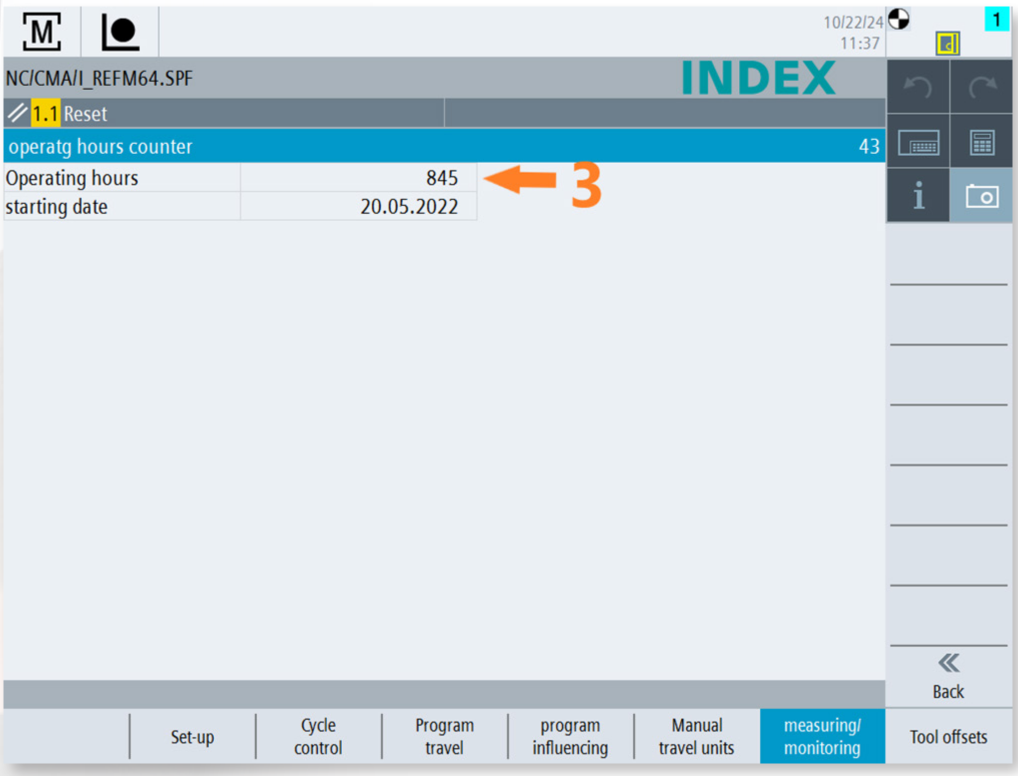
Service Reports: Machine Running Time

MULTI-SPINDLE MACHINE







1. Press MEASURING / MONITORING
2. Press ELAPSED TIME METER
3. Press RECORD OPERATING HOURS

Service Reports: Documenting Time On-Site

Time Efforts

Date	Time Efforts in Hours	Waiting Time in Hours	from	to	Task
Mo. 07/01/2024	5	0	08:00 AM	01:00 PM	work hours
Tu. 07/02/2024	4	0	10:00 AM	02:00 PM	work hours
We. 07/03/2024	6	0	06:30 AM	12:30 PM	work hours
SUM	**15**	**0**			
SUM total	**15**				

Your time on-site is critical to ensure proper billing to our customers for all time required to complete a task. As such there are a few key points to keep in mind when completing this section of your service report.

Log all time from _________ to _________. In other words, from the time you leave your house to the time you walk into the customer site is considered billable travel time. This applies to both arrival a departure.

Log all time while conducting any work on the machine or researching parts, documentation, or procedures.

In context of the example above can you point out any errors?

Service Reports: Important Notes to Address Common Questions

1. Verifying Equipment Serial Numbers

It is crucial to verify that the serial number of the equipment matches what is listed on your Service Report. If there is a discrepancy, it can lead to issues such as incorrect billing and inaccurate machine history records. Always confirm this information with your point of contact upon arrival.

2. Addressing Additional Customer Requests

During your career, you will likely be asked to inspect or address another piece of equipment while on-site. As we pride ourselves on exceptional customer service, your answer should always be yes. However, balancing customer satisfaction with company obligations is essential.

Limit time spent on unplanned tasks to ___ minutes unless authorized by Service Management (e.g., Erik).

Inform Service Management if additional time is needed so a new Service Report can be created to document the work appropriately.

3. Weekly Service Reports

A new Service Report is required for each week, even if you are working on the same equipment. Ensure you mark the __________ checkbox on the Service Report if the task extends beyond the current week. This process generates a new transaction number for each reporting period.

4. Accurate Time Documentation

Time entries must be finalized before submitting your Service Report, as changes cannot be made afterward. Additionally:

Proper time documentation ensures the Customer has verified the hours worked.

Altering time entries post-submission would prevent the Customer from confirming accuracy, undermining trust and transparency.

By following these guidelines, you can ensure smooth operations, clear documentation, and excellent customer service.

Service Reports and Daily Updates

Service reports must be completed weekly, generated by Customer Support like regular service calls. Take daily notes of your activities, documenting details and times. On Monday mornings your reports will reviewed with feedback for improvement.

Work collaboratively—ask questions, share tips, and learn from peers, but do not copy.

1. Daily Email Updates

When in the field, you must send daily email updates to the designated address. Initially, your instructor may remind you, but this must become part of your routine. These updates serve to:

Inform Service Management of your progress.

Identify support needs.

Notify Schedulers and Managers if you finish tasks early for reassignment.

2. Formatting

Follow the standard format: WHO, WHAT, WHEN, WHERE, and HOW. Many technicians use their daily updates as a basis for service reports. Ensure time on your updates matches your service reports and timecards, as discrepancies may be reviewed.

3. Best Practices

Complete service reports, timecards, and expenses at the end of each week while in the field. This is paid work time and part of your responsibilities. Completing tasks promptly ensures accuracy and prepares you for the following week.

Daily email updates are _________________ **in the field** but not required while in Noblesville. Use field weeks to learn from senior technicians and refine your reporting skills.

The Importance of Time-Sheets

Completing your time-sheets is crucial for many reasons, and it's important to understand what happens behind the scenes after you fulfill this responsibility. At a minimum, you must complete your time-sheet weekly, though daily updates are preferred. While we understand this may not always be practical in the field, it is vital that your time-sheets match your Service Reports.

1. Why Accuracy Matters

If your time-sheets and Service Reports don't match, you risk not being compensated for any extra time worked. Additionally, in Service, every task you perform is categorized (e.g., warranty, non-warranty, awaiting parts). This categorization is essential for:

- Proper customer billing.
- Calculating the company's operating costs.
- Managing payroll.

The Service Manager also relies on this information to estimate job durations. Inaccurate time-sheets can lead to inefficiencies, confusion, and extended on-site work.

2. How to Categorize Your Time

When not assigned to a specific machine, categorize your time as directed. If you're working on a machine at INDEX or during OJT in the field, it's crucial to log your time accurately according to the provided guidelines.

3. What Happens if You Forget?

Mistakes happen—if you forget to log your time, don't panic. HR will default your time to a standard 40-hour workweek. However, this does not include overtime or weekend bonuses. To receive compensation for missed time, you must:

1. ______________________________
2. ______________________________

While admitting the mistake may be uncomfortable, INDEX will ensure you are paid for all time worked. The missed time will typically be included in your next pay period, provided you take the necessary steps to report it.

4. Final Note

Accurate time-sheets are not just about getting paid—they support the company's operations, ensure transparency, and help your team succeed. Make this a habit to avoid unnecessary delays or issues.

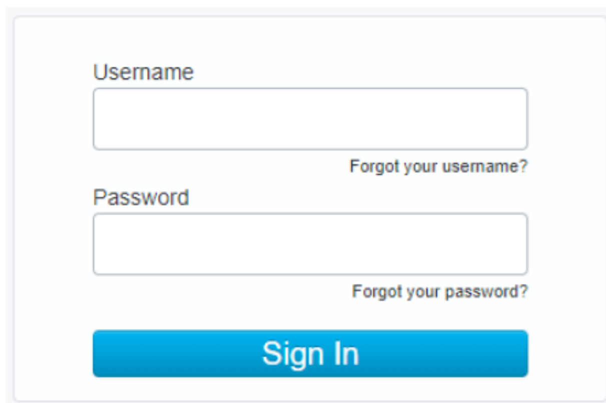
Service Reports: Entering Hours Worked on Paycor

INDEX CORPORATION: PAYCOR TIME CARD WORK INSTRUCTIONS

Paycor Timecard Work Instructions

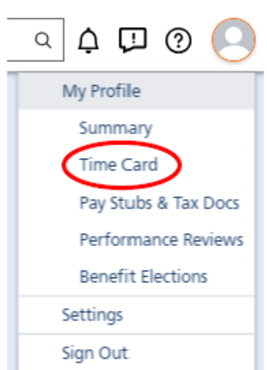
To Enter Work Hours

1. Login to Paycor at Paycor.com



2. Click on the Avatar icon (Profile Menu) at top right of the screen

3. Click on 'Time Card'.



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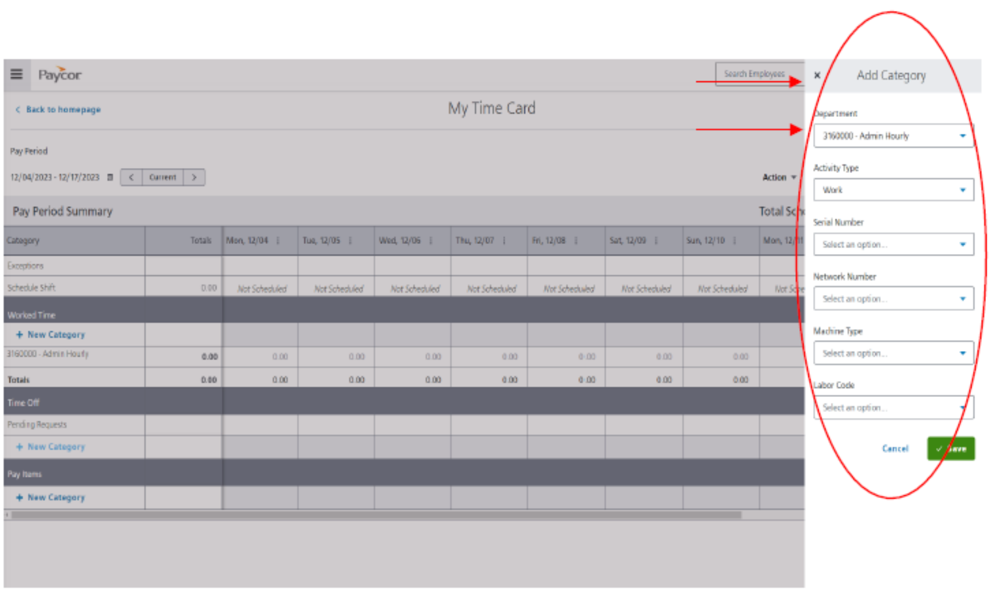
INDEX CORPORATION: PAYCOR TIME CARD WORK INSTRUCTIONS

4. To add hours worked, choose 'New Category' under 'Worked Time'.

5. A Pop-up will appear on the far right side of your screen/time card. The 'Department' will be pre-filled. The 'Activity Type' will be pre-filled to 'Work'. No need to change either of these. You will need to select from the drop-down to complete 'Serial Number', 'Network Number', 'Machine Type', and 'Labor Code'. You can begin typing the number and options will show for you to scroll through and choose from. These are required fields. **If you are not working on a project, please use code 999-999 for Serial / Network Numbers, ZZZ-ZZZ for Machine Type, and GL for Labor Code.**



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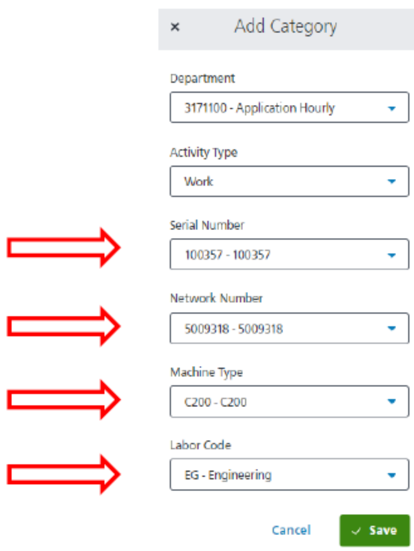
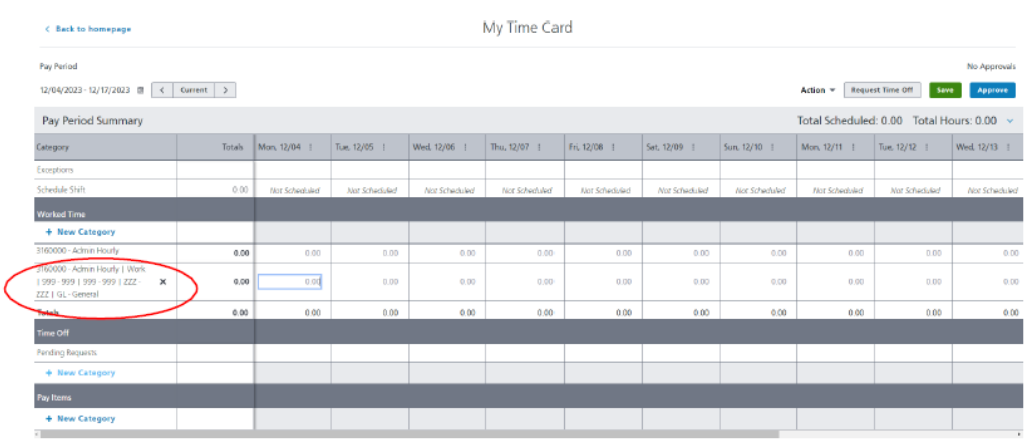
Service Reports: Entering Hours Worked on Paycor

INDEX CORPORATION: PAYCOR TIME CARD WORK INSTRUCTIONS

6. Once you have filled out the Serial / Network Numbers, Machine Type, and Labor Code – click 'Save' at the bottom of the page. These are required fields. **If you are not working on a project, please use code 999-999 for Serial / Network Numbers, ZZZ-ZZZ for Machine Type, and GL for Labor Code.**



7. A new row will appear under 'Worked Time', '+ New Category' with the information you provided when you selected Serial / Network Numbers, Machine Type, and Labor Code.



INDEX CORPORATION: PAYCOR TIME CARD WORK INSTRUCTIONS

8. If you work with multiple Serial/Network Numbers, Machine Types, or Labor Codes during the week you will need to add additional Categories ('+ New Category) by repeating steps 5 & 6 as many times as needed.

9. Once you have your categories saved, you will need to record the hours you worked in the corresponding boxes for the columns with that corresponding date. Click 'Save' to submit your time card.

To Request Weekend Bonus

1. To submit a request for a 'Weekend Bonus', you will click on '+ New Category' under 'Pay Item'.

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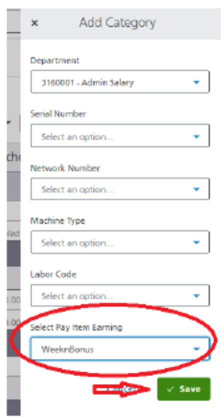
Service Reports: Entering Hours Worked on Paycor

INDEX CORPORATION: PAYCOR TIME CARD WORK INSTRUCTIONS

2. A Pop-up will appear on the far right side of your screen/time card. The 'Department' will be pre-filled. You will **NOT** need to select from the drop-down to complete 'Serial Number', 'Network Number', 'Machine Type', or 'Labor Code'. You **WILL** click on the 'Select Pay Item Earning' drop down and select 'WeeknBonus'. Then 'Save'.



3. A new category will appear under 'Pay Items' column. You will need to go to the corresponding Sunday date and enter the weekend bonus amount. Then click 'Save'

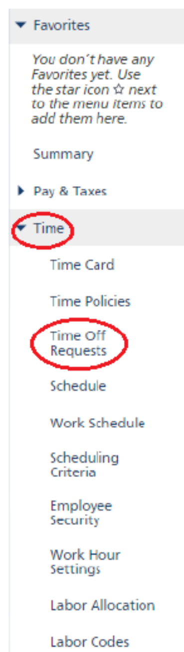
Eligibility requirements to receive a Weekend Bonus:

**Weekend Bonus – If your assignment requires a weekend stay (both Saturday & Sunday) at or with the customer which does not allow you to be home on the weekend, you are eligible for the weekend bonus.*

Weekend Bonus requests must be entered on the Sunday of the week incurred. For example, if you are required to work, or stay, at a customer's location over the weekend for week ending 12/10/2023, you will record the $400 weekend bonus amount in the Sun. 12/10

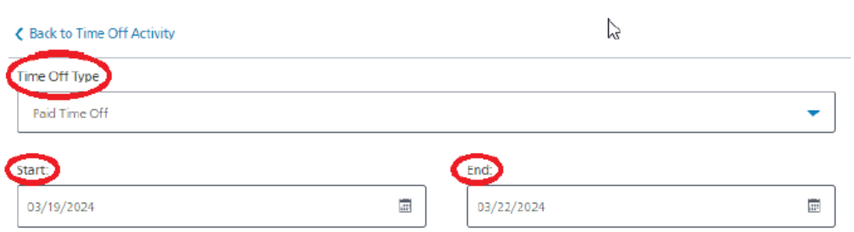
To Request Time Off

1. To request Personal Time Off (PTO), Floating Holiday, Jury Duty or Bereavement time off you will click on your Avatar icon (Profile Menu). Select 'My Profile'. Once in your profile you will go the menu on the right and click on 'Time', then 'Time Off Requests'.



2. You are now on the 'Time Off Activity' screen. Click on 'Request Time Off' in top right hand corner of the screen.

3. In the 'Time Off Type' drop down select the type of time off you are requesting. Enter a start and end date. When the dates appear, adjust 'Request Type' and 'Partial Day Request Details' (use military time for this entry) if necessary. Click on 'Submit' when finished. Your request will appear in the 'Time Off' section on your time card.



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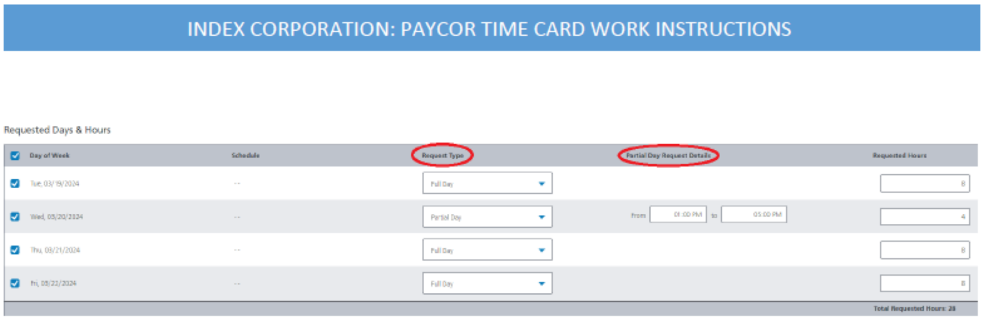
Service Reports: Entering Hours Worked on Paycor



INDEX CORPORATION: PAYCOR TIME CARD WORK INSTRUCTIONS

Requested Days & Hours

Day of Week	Schedule	Request Type	Partial Day Request Details	Requested Hours
Tue, 03/19/2024	--	Full Day		8
Wed, 03/20/2024	--	Partial Day	From 01:00 PM to 05:00 PM	4
Thu, 03/21/2024	--	Full Day		8
Fri, 03/22/2024	--	Full Day		8
				Total Requested Hours: 28

Expense Reports: A Vital Tool to Track Travel Costs

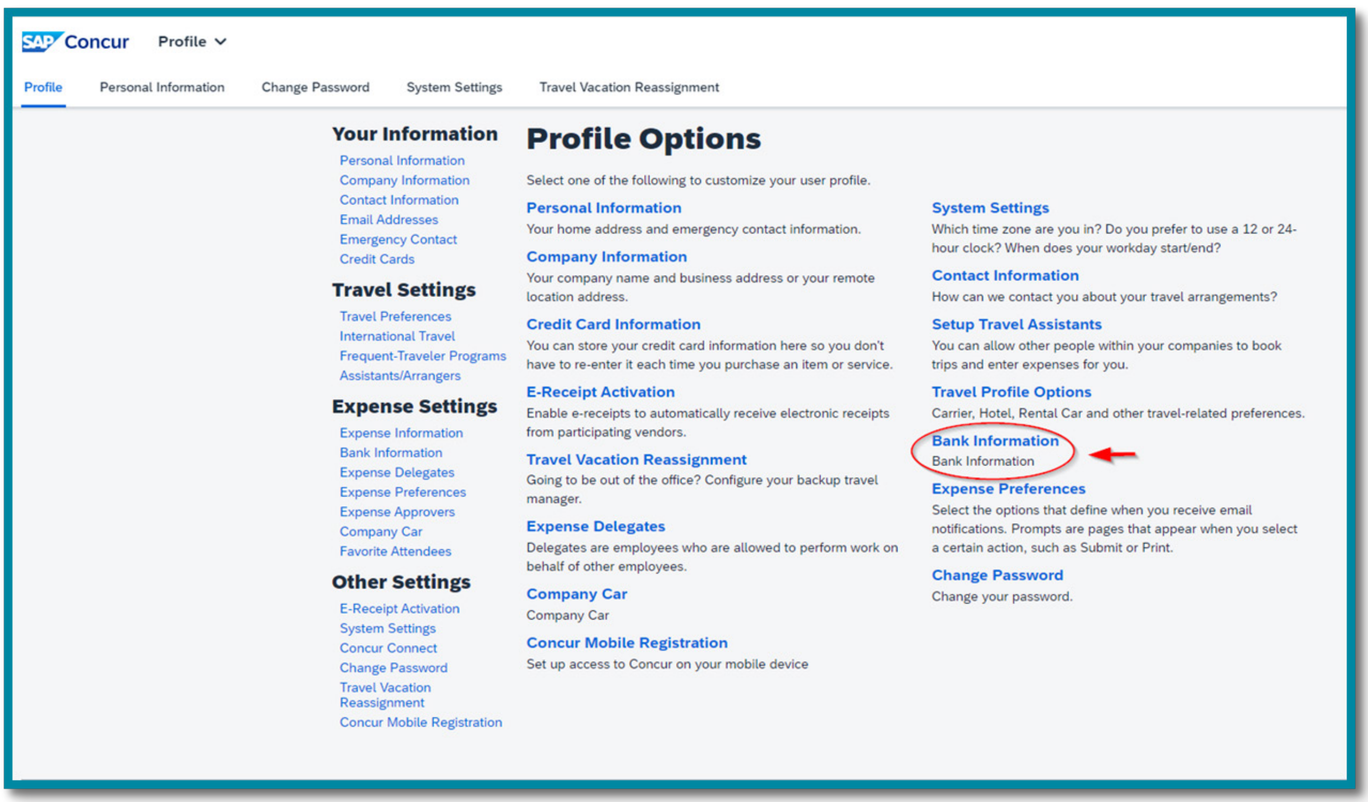
Expense reports are one of the most critical administrative responsibilities you'll have as a Field Service Technician. They are the only way to ensure reimbursement for your travel-related expenses, including food, rental cars, flights, and hotels.

At INDEX, we use Concur to manage expense tracking and reimbursement. Concur serves a dual purpose:

1. ____________________: To submit reports for reimbursement.
2. ____________________: To book flights, rental cars, hotels, and other travel needs.

Setup Profile

Your first step upon logging into Concur should be to set up your profile. This ensures all your personal information is correctly configured, streamlining future reporting and bookings.



1. Creating a New Report

From the main Concur page, click **"Create"** and then **"Start a Report."**

Report Naming:

If your charges are tied to a ______________________, include the number(s) in the report name.

For multiple service order numbers, list them all.

If no service order number applies, summarize the reason for the expenses in the report name.

2. Creating an Itinerary

An _____________ maps your travel stops. At least two stops are required: one for your destination and one for your return.

Itinerary Naming:

By default, the itinerary name matches the report name. Update it to something recognizable for easy reference.

When Itineraries Are Not Required:

If your expense report is for non-travel-related costs (e.g., safety shoes), no itinerary is needed as there is no per diem.

Example:

Stop 1: Departure to your destination.

Stop 2: Return from the destination.

For trips involving multiple sites in a single week:

Create a separate itinerary for each service order number or trip.

This ensures you receive the correct per diem, especially since the first and last days of travel are reimbursed at **75%** of the full rate.

3. Entering Per Diem

Per diem rates are based on travel duration and activities.

Per diem is ___________ on the first and last day of travel.

Example Scenario:

Traveled to Chicago, IL for a week:

Departed Monday at 8:00 AM; returned Friday at 4:00 PM.

Per diem for Monday and Friday is **75%** of the full rate since no overnight travel or extended workday occurred.

On Tuesday, dinner was covered by the INDEX Sales Representative. For this day, select **"Dinner Provided"** in Concur to exclude per diem for that meal.

Remaining days were reimbursed at the standard rate of $69/day.

Important:

The per diem rate is a flat amount. Stick to it, as any overages will be your responsibility.

4. Adding and Categorizing Expenses

Typical Expense Types:

Hotel: Include all charges except incidentals.

Travel: Includes rental car, flight, or personal vehicle mileage.

Flights:

Book flights through Concur whenever possible.

For exceptions, direct approval is required from the CFO.

All **GANT** flights must be marked **"Company Paid Credit Card"** in Concur.

Delete auto-generated airfare lines in Concur and manually enter the actual amount, including service fees.

Rental Cars:

Reimbursement for fuel applies only to charges incurred during the rental period.

Avoid paid add-ons (e.g., GPS, insurance, non-free upgrades).

Do not elect insurance coverage; INDEX has a blanket policy covering domestic and international travel.

Vendor Recommendations:

Use **National** for airport travel (domestic).

Use **Enterprise** for local travel.

For international travel, compare options and select the lowest price.

Other Expense Types:

Shop Supplies:

Verify your department's policy before making purchases.

Managers may differ on spending limits without prior approval.

Common guideline: Purchases under $100 may not require pre-approval.

Prohibited Categories:

Avoid using Expense Types under **Relocation** (Section 9) or **Accounting Only** (Section 10).

5. Additional Notes

Always consult your manager if unsure about specific expenses.

Follow company guidelines to ensure reports are accurate and compliant.

Addressing Common Issues and Questions for Submitting Expense Reports

Meals and Per Diem

Meals do not need to be listed individually because per diem (daily allowance) is used instead.

Overnight travel automatically qualifies for a per diem allowance.

Extra-long workdays (12 hours or more) on short trips also qualify for per diem.

Attaching Receipts

Ensure the total amount is clearly visible in the receipt photo.

Expenses with unclear or missing totals will not be approved, and the expense report will be rejected for correction.

Service Report Requirement

Expense reports must be submitted with your weekly service report.

Important: If the service report is not signed and included, your expense report will be rejected.

Best Practices

For any expense that might raise questions, include a comment addressing the anticipated question.

While these guidelines may seem straightforward, they are easy to overlook during busy travel periods—refer back as needed.

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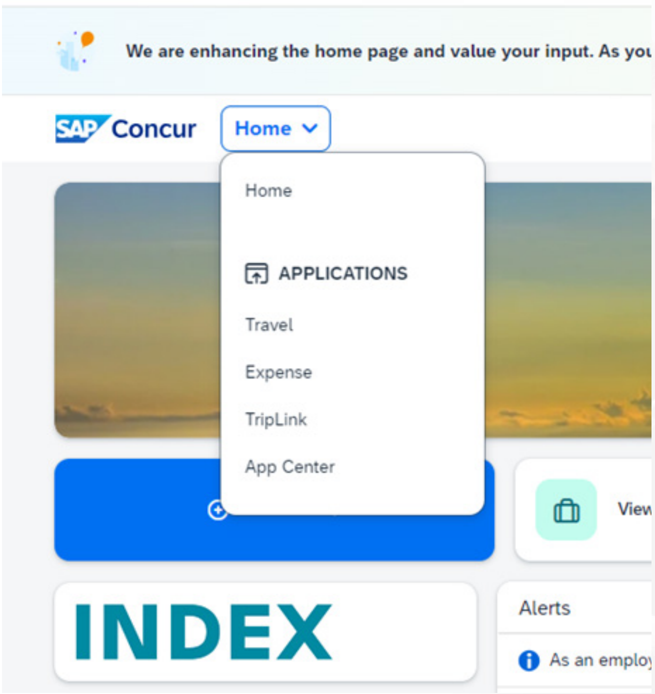
Booking Travel in Concur

Navigate to us2.concursolutions.com or Confluence home page and click Concur.

Login to Concur

Select - Home - Travel from the top left of the screen



Flights

Policies

Lowest fare should be selected without a needed justification.

Flights higher than 20% of the lowest fair or higher than $800 on domestic flights and $1500 for international flights will require justification and approval from Kevin Tretter. You should also consult your Manager before submitting for approval.

Economy Main Cabin flights are the only reservations INDEX will pay for.

All flights can be canceled within 24hrs of booking without any cancelation penalties. All others can be canceled with a fee. All refunds for flights are for the same Airline originally booked.

Flight Change Process:

If you need to change your flight for any reason you should first consult with your Manager so they are aware. Next, you need to contact our travel agency Gant at the below information.

Gant Travel Management

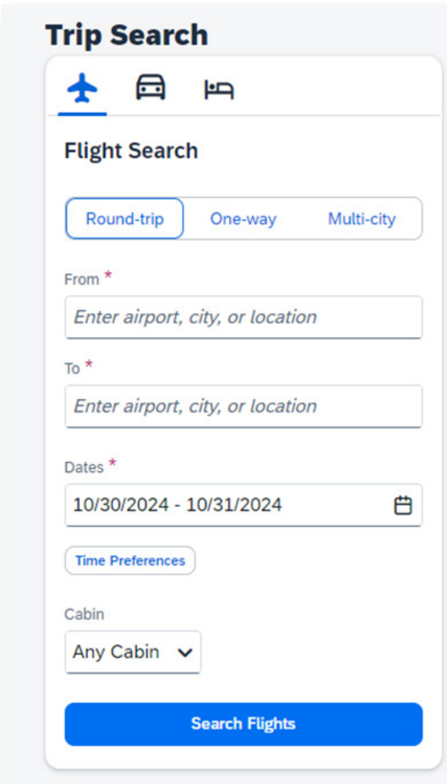
400 West 7th Street, Suite 104

Bloomington, IN 47404

Phone: (224) 205-4713 Fax: (630) 227-3875

Toll Free: (877) 924-0303

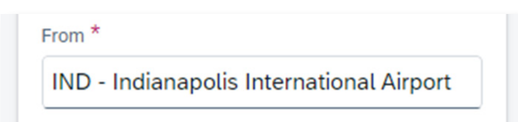
After Hours: (224) 205-4713



Choose if you will be making a round trip or if you are just flying one way. On the occasion you do not have a return date yet select one way. If you are unsure, ask your supervisor.

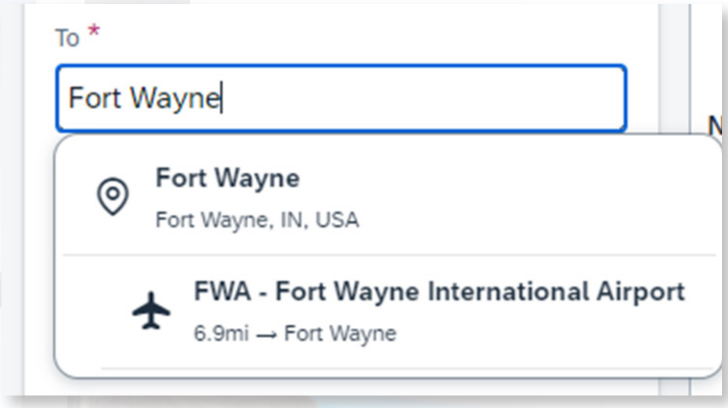
Enter the Airport code where you will be leaving

NOTE: Indianapolis is IND. If you do not know what airport is close type the city or zip code that you will be traveling to.

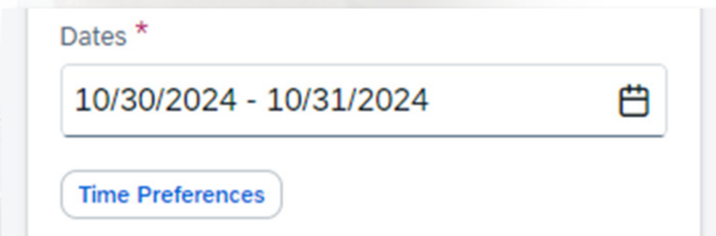


Enter the airport code of the arrival city that you will be traveling to

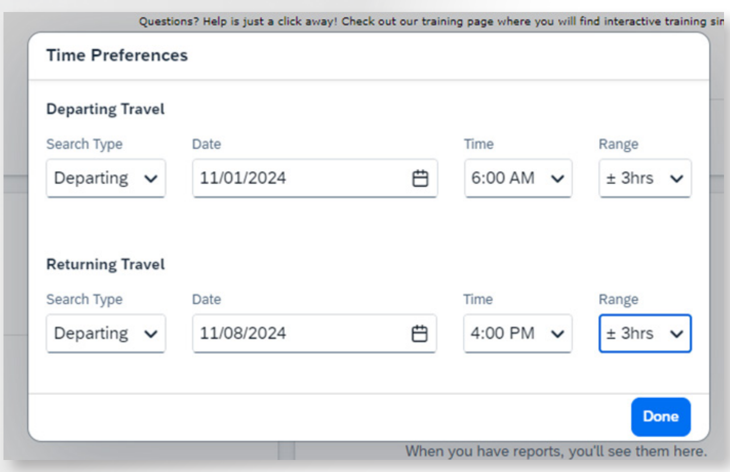
NOTE: If you do not know what airport is close, type the city or zip code that you will be traveling to.



Enter your departure and return date



NOTE: You can change the times if you know when you want to try leaving departure airport and leaving the arrival airport by clicking Time Preferences



Select - Search Flights

NOTE: Do not change cabin preferences to get the maximum options available.

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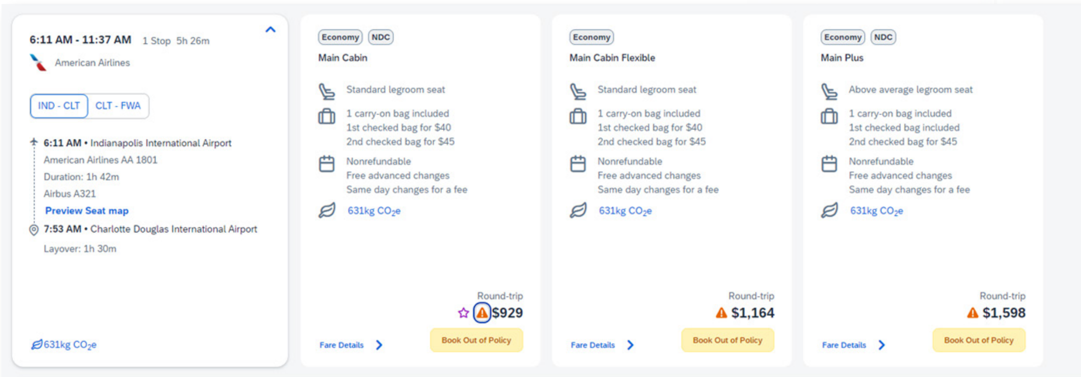
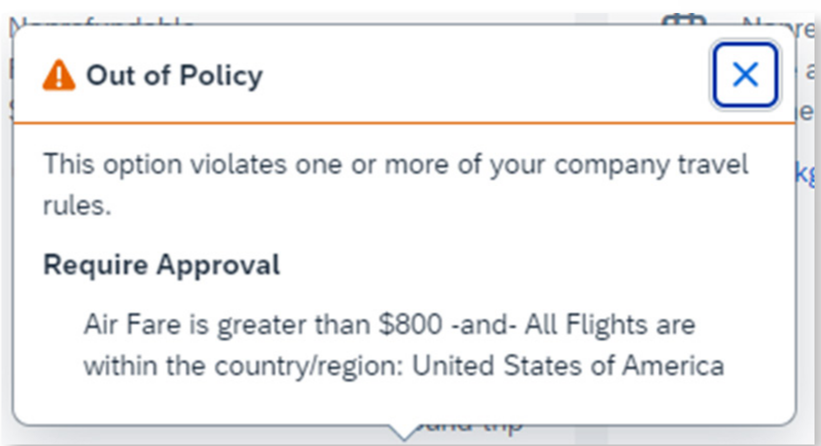
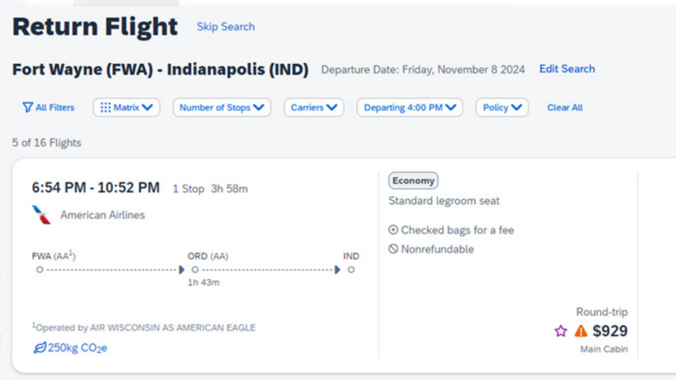


Select your departure flight by clicking book

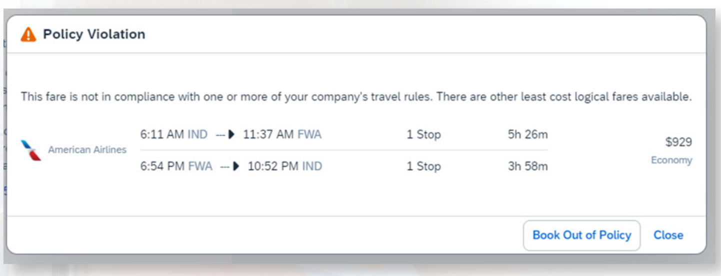
NOTE: After selecting your departure flight, you will be given the option to select which cabin you'd like to select. It is the policy of INDEX that any flight booked not in Main Cabin will be the responsibility of the employee to pay for the extra cost. INDEX will not reimburse this expense. In the example above the employee would need to pay out of pocket $235 to upgrade to Main Cabin Flexible.



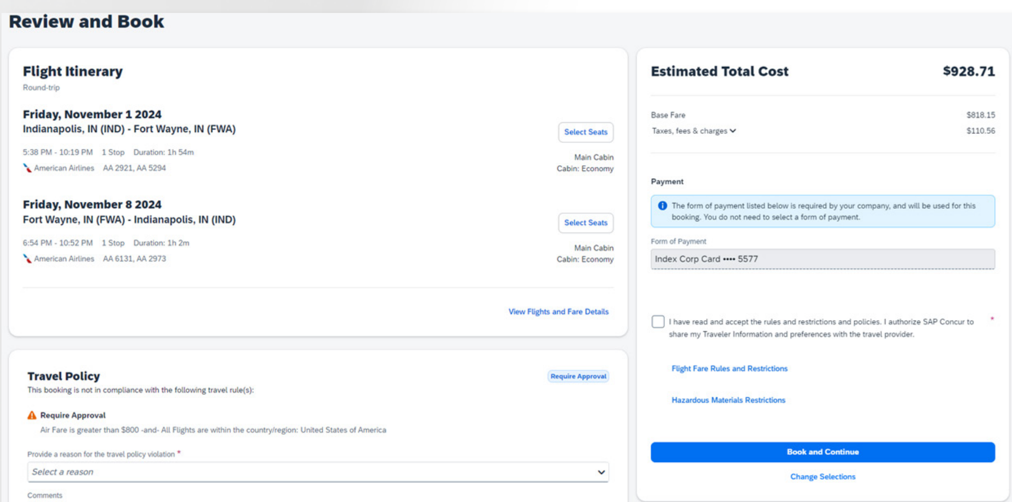
Additionally, as is the case in the example above, any flight above either 20% higher than the lowest available flights or $800 on Domestic travel and $1500 on International travel will need a justification.



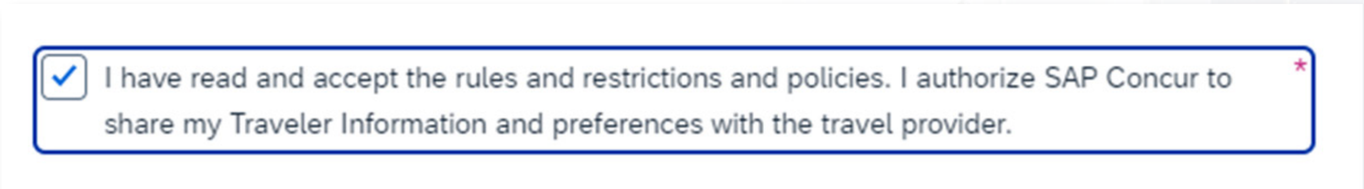
Enter your departure and return date



As in the case above if, your flight is out of policy, you will see the above warning. If your flight is within policy on the next step, click Book and Continue

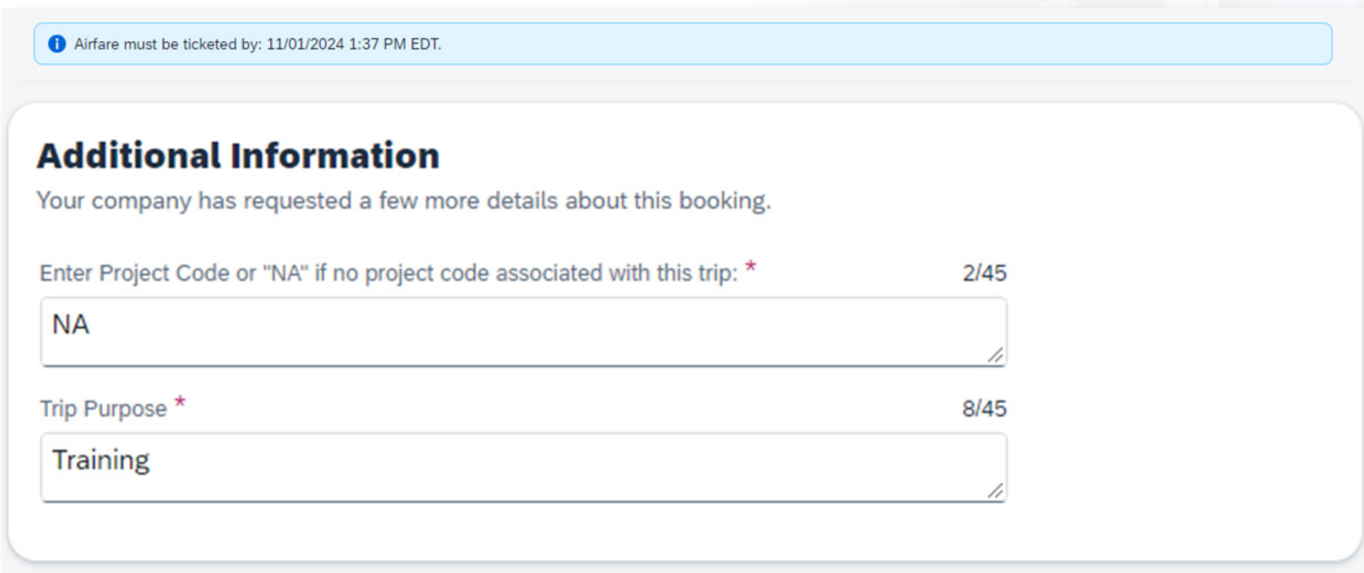


Click the box accepting the rules and restrictions and policies.



Select - Book and Continue

NOTE: You will be given the opportunity to customize your trip details or add a description if you would like.

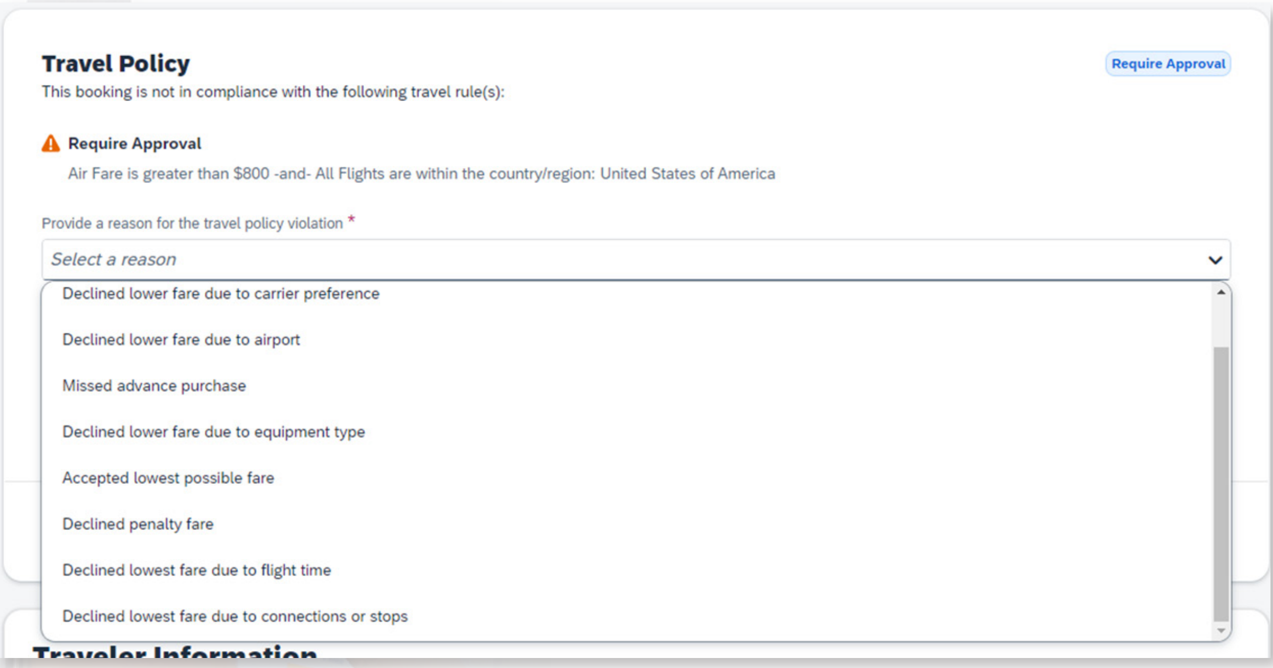


You will need to add the Project Code (or Network Code) to the additional information box. You will also need to include the stated purpose for this trip.

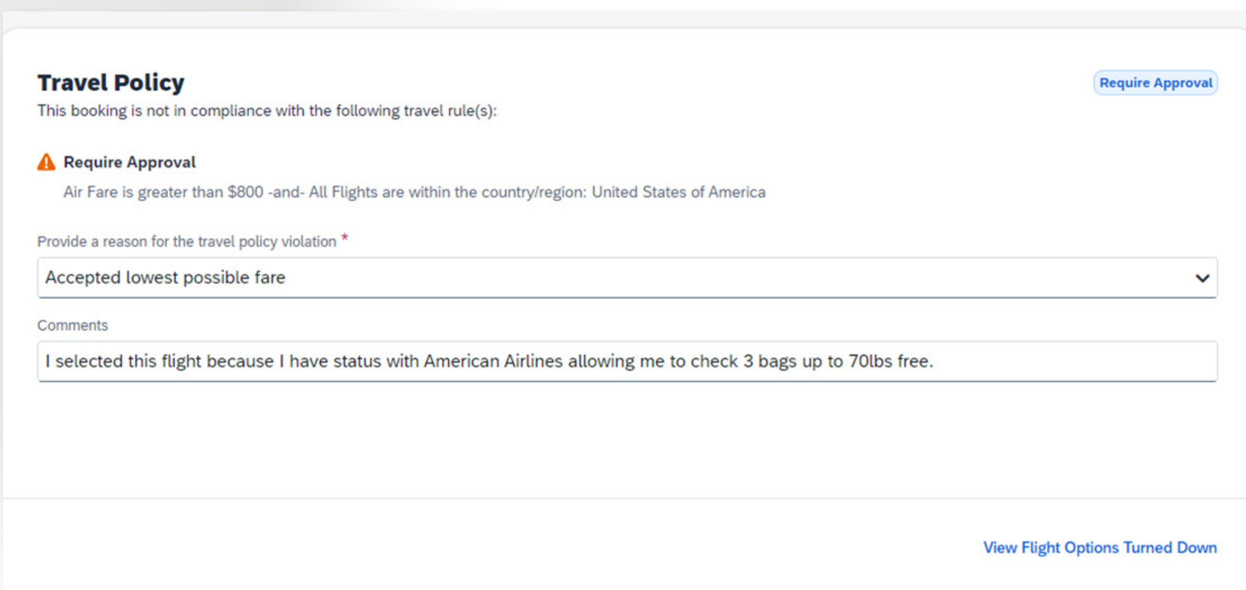
Select - Finalize Trip

POLICY VIOLATION:

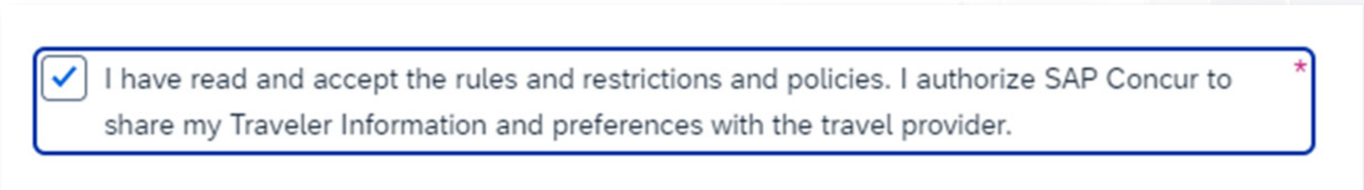
For those with a policy violation warning you will need to select a reason from the drop down menu.



After selecting the drop down that most closely matches your reason for selecting the flight you need to add a comment with justification as in the example shown.

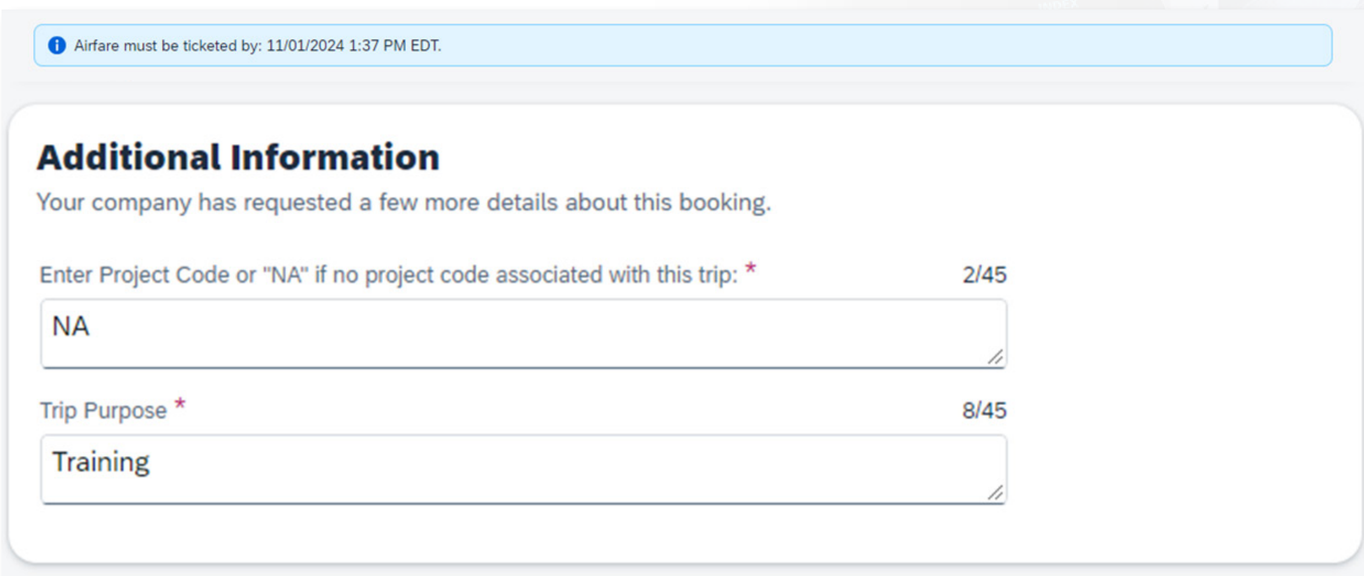


Click the box accepting the rules and restrictions and policies.



Select - Book and Continue

NOTE: You will be given the opportunity to customize your trip details or add a description if you would like.



You will need to add the Project Code (or Network Code) to the additional information box. You will also need to include the stated purpose for this trip.

Select - Finalize Trip

INDEX

Rental Cars

Policies:

A rental car is required when traveling more than 300 miles one way.

National should be used for booking any rental cars when flying into an airport with the exception being on international travel only.

Our Global Contract ID that should be used when creating a National rewards account is XZ08J98. If you already have a rewards account you need to link it to our Global Contract ID.

Enterprise should be used for booking any rental cars when planning a trip from your residence.

International rental cars should be price compared to all available option. The cheapest fair is what should be used.

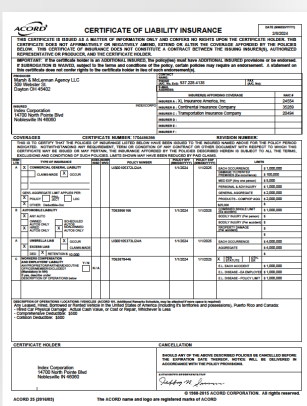
Nothing higher than an Intermediate car should be booked. Free upgrades are ok to accept. However, it is your responsibility to verify there will be no extra charges at any point in the duration of the rental period.

Fuel charges either prepaid or because of forgetting to fill the tank upon return will not be paid by INDEX and will be your responsibility.

Insurance:

Travelers should not elect any insurance coverage as INDEX has both a domestic and international car insurance policy that covers all INDEX employees on official business. Travelers should double click the image below and save/print the applicable policy before travel.

Domestic



ACORD CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 2/8/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: Marsh & McLennan Agency LLC, 309 Webster St., Dayton OH 45402
PHONE (A/C, No, Ext): 937.228.4135

INSURED: Index Corporation, 14700 North Pointe Blvd, Noblesville IN 46060 (INDEXCORPO)

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A: XL Insurance America, Inc.	24554
INSURER B: Continental Insurance Company	35289
INSURER C: Transportation Insurance Company	20494

COVERAGES — CERTIFICATE NUMBER: 1704466366 — REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
A	X COMMERCIAL GENERAL LIABILITY; X OCCUR; GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY; X OTHER: Deductible-Occ	US00105372LI24A	1/1/2024	1/1/2025	EACH OCCURRENCE $1,000,000; DAMAGE TO RENTED PREMISES $100,000; MED EXP $5,000; PERSONAL & ADV INJURY $1,000,000; GENERAL AGGREGATE $2,000,000; PRODUCTS - COMP/OP AGG $2,000,000; $25,000
B	AUTOMOBILE LIABILITY; X ANY AUTO; X HIRED AUTOS ONLY; X NON-OWNED AUTOS ONLY	7063866166	1/1/2024	1/1/2025	COMBINED SINGLE LIMIT $1,000,000
A	X UMBRELLA LIAB; X OCCUR; X EXCESS LIAB; X RETENTION $10,000	US00105373LI24A	1/1/2024	1/1/2025	EACH OCCURRENCE $4,000,000; AGGREGATE $4,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY; N/A	7063878446	1/1/2024	1/1/2025	X PER STATUTE; E.L. EACH ACCIDENT $1,000,000; E.L. DISEASE - EA EMPLOYEE $1,000,000; E.L. DISEASE - POLICY LIMIT $1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES:
Any Leased, Hired, Borrowed or Rented Vehicle in the United States of America (including it's territories and possessions), Puerto Rico and Canada:
- Hired Car Physical Damage: Actual Cash Value, or Cost or Repair, Whichever is Less
- Comprehensive Deductible: $500
- Collision Deductible: $500

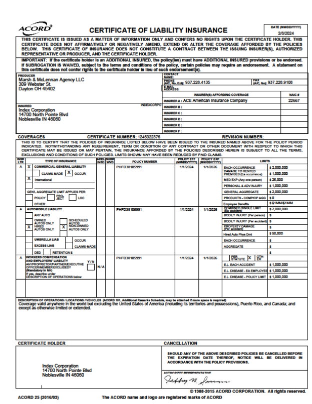
CERTIFICATE HOLDER: Index Corporation, 14700 North Pointe Blvd, Noblesville IN 46060

CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD

International



ACORD CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 2/8/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: Marsh & McLennan Agency LLC, 309 Webster St., Dayton OH 45402
PHONE (A/C, No, Ext): 937.228.4135 FAX (A/C, No): 937.228.9108

INSURED: Index Corporation, 14700 North Pointe Blvd, Noblesville IN 46060 (INDEXCORPO)

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A: ACE American Insurance Company	22667

COVERAGES — CERTIFICATE NUMBER: 1245022376 — REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
A	X COMMERCIAL GENERAL LIABILITY; X OCCUR; X International	PHFD38105991	1/1/2024	1/1/2026	EACH OCCURRENCE $2,000,000; DAMAGE TO RENTED PREMISES $1,000,000; MED EXP $25,000; PERSONAL & ADV INJURY $1,000,000; GENERAL AGGREGATE $2,000,000; PRODUCTS - COMP/OP AGG $0; Employee Benefits $1MM/$1MM
A	AUTOMOBILE LIABILITY; X HIRED AUTOS ONLY; X NON-OWNED AUTOS ONLY	PHFD38105991	1/1/2024	1/1/2026	COMBINED SINGLE LIMIT $2,000,000; Hired Auto Phys Dmt $50,000
	UMBRELLA LIAB; EXCESS LIAB				
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY; N/A	PHFD38105991	1/1/2024	1/1/2026	X OTH-ER; E.L. EACH ACCIDENT $1,000,000; E.L. DISEASE - EA EMPLOYEE $1,000,000; E.L. DISEASE - POLICY LIMIT $1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES:
Coverage valid anywhere in the world but excluding the United States of America (including its territories and possessions), Puerto Rico, and Canada; and except as otherwise limited or extended.

CERTIFICATE HOLDER: Index Corporation, 14700 North Pointe Blvd, Noblesville IN 46060

CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD

Steps to enroll in the Emerald Club through National or link an existing account

Step 1:

Enroll in Emerald Club (loyalty program)

www.nationalcar.com/enroll/XZ08J98

Recognized at Both Brands (ability to earn points and rewards)

National Brand – additional value – ability to bypass counter at Emerald Aisle locations

If you already have an Emerald Club number

Be sure to connect your Emerald Club profile to your company contract to access any new benefits and ensure your information is current.

Click on your company's exclusive enrollment link (above).

Select "Enroll Now".

Confirm your new company name is listed above and select "Sign In".

Sign in with your Emerald Club Number & Password.

Confirm your company name is listed and select "Update".

If you have a loyalty program with any competitor – and you are in the 2nd or 3rd tier program – We will Status Match you into our program

Use this Status Match link – Having additional Status – may help with vehicle availability

https://status.emeraldclub.com

Step 2:

Reserve Vehicles

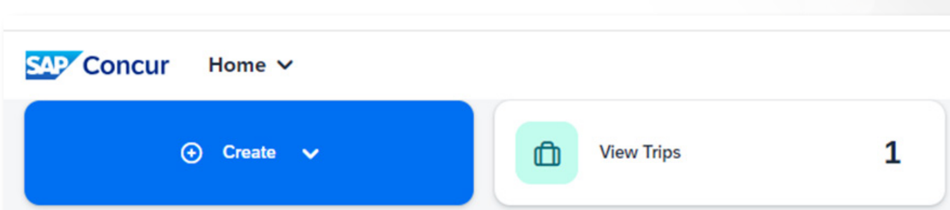
Business Travel

Reserve via Normal Reservation Process –

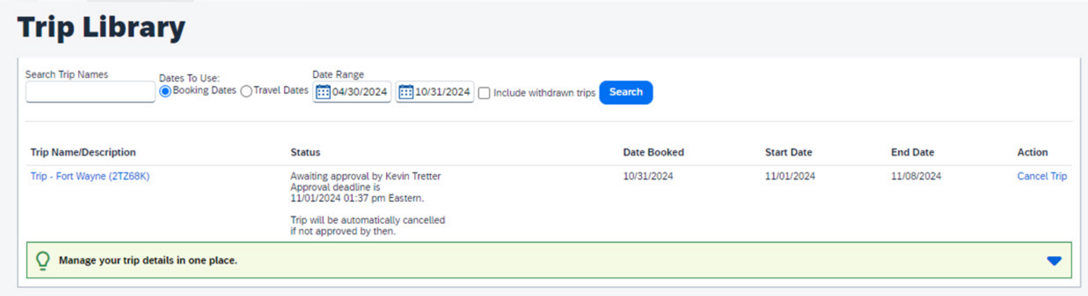
Make sure your Emerald Club number – Loaded into your travel profile

For both National and Enterprise

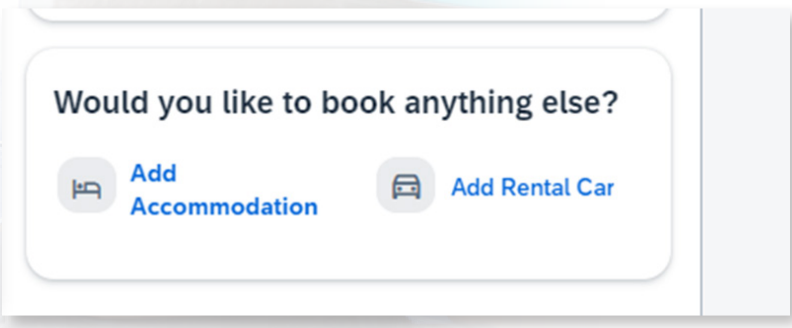
Method 1:



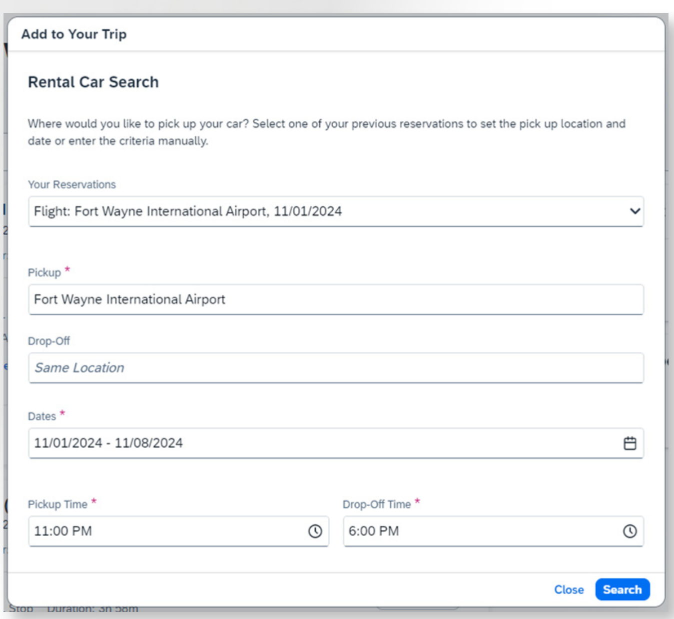
INDEX



Select - The trip you'd like to add a rental car to.

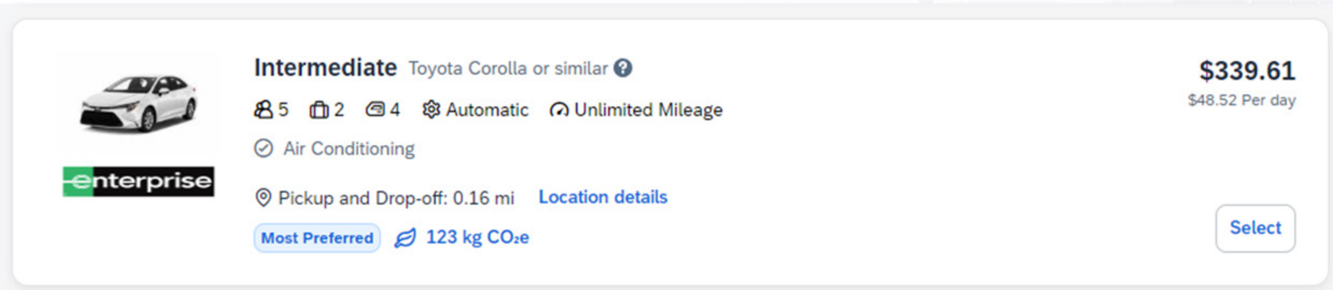


Select - Add rental car

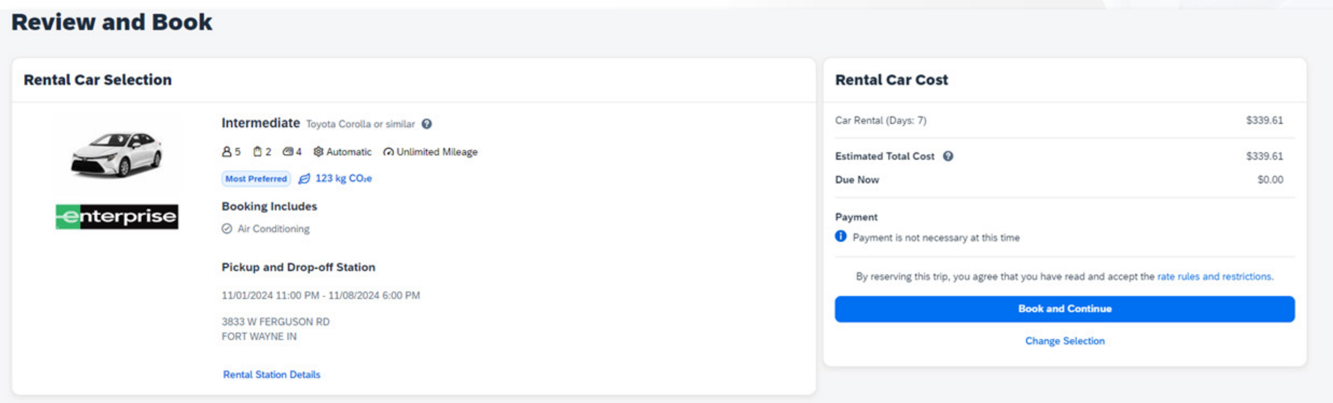


NOTE: You can modify the details of your rental car reservation on this page. However, you should not need to change anything here unless you plan to drop off at a different location other than the airport you are going to be arriving at.

Select - Search

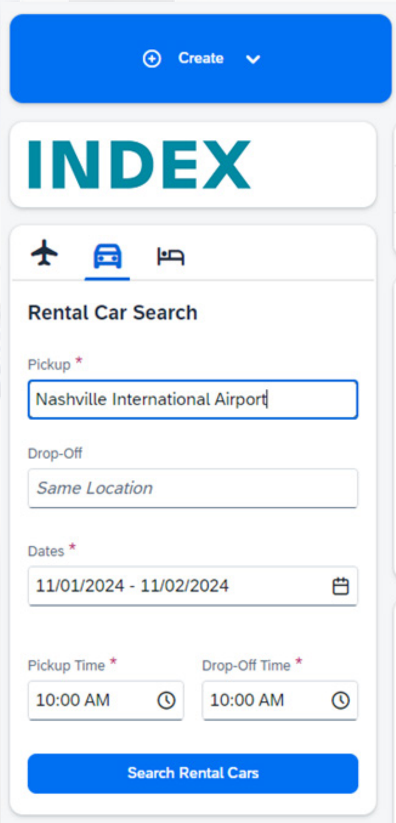


Select - Select



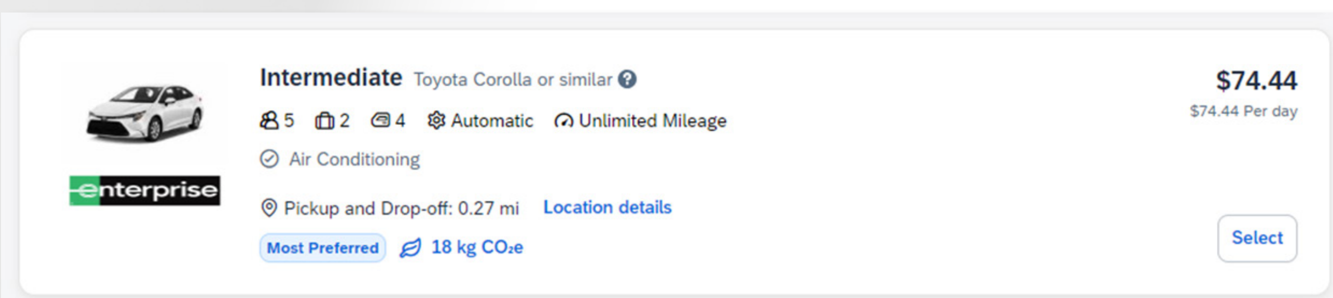
Select - Book and Continue

Method 2:

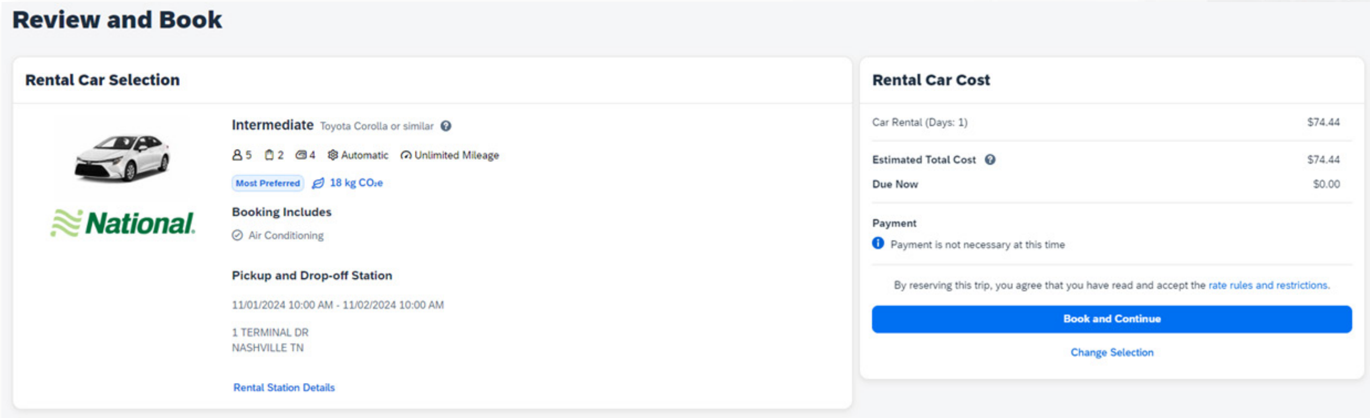


Enter the name of the pickup location, drop-off location (if different from pickup) and the dates and times you would like to pickup and drop-off the car.

Select - Search Rental Cars



Select - Select



Select - Book and Continue

Hotels

Policies:

Hotels are not required to be booked through concur. However, it is important to note the cancelation policy of the hotel to ensure your reservation can be canceled if your schedule changes.

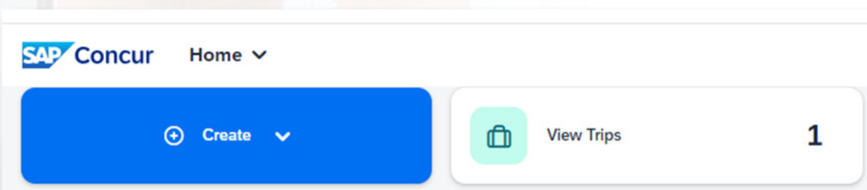
Do not book prepaid hotels as schedules are subject to change with little notice.

INDEX does not require you to choose the cheapest hotel rate available. Hotel brands that are a popular choice and are typically within INDEX guidelines are IHG, Hilton, and Marriott.

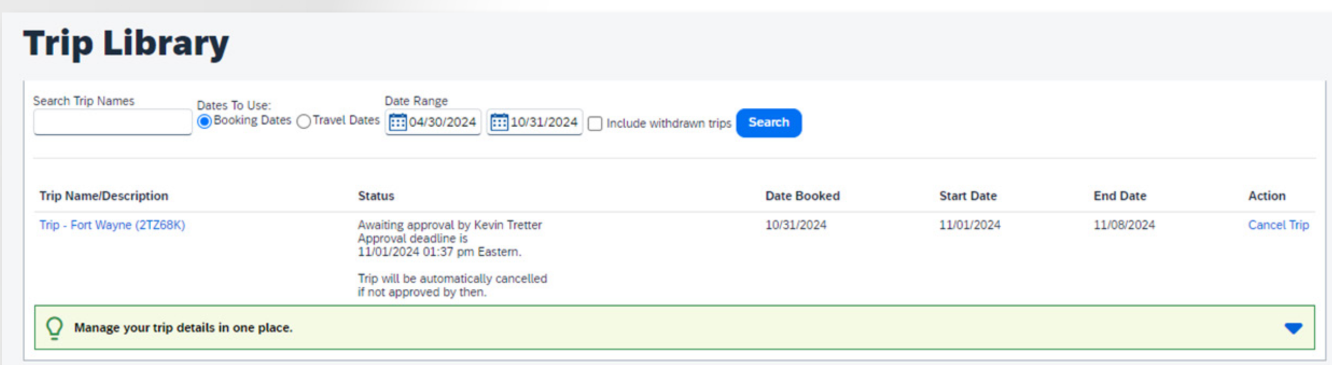
Hotels above $130 per night will require approval and justification in the Concur app when booking. INDEX understands hotels in higher costs of living will likely incur higher rates. A simple justification is all that is required to your Manager when booking outside of policy.

Food and extra charges should be deducted from your hotel bill that you will use for your expense report.

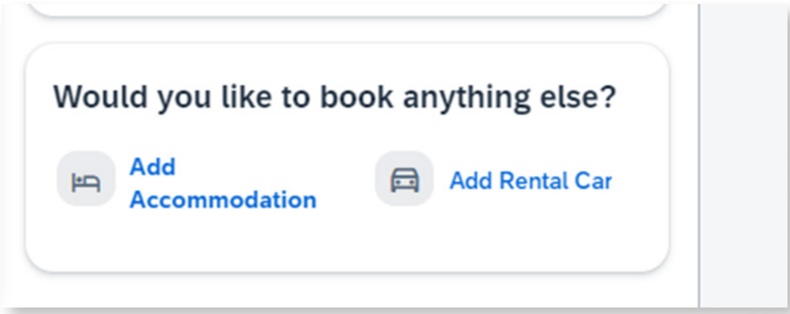
Method 1:



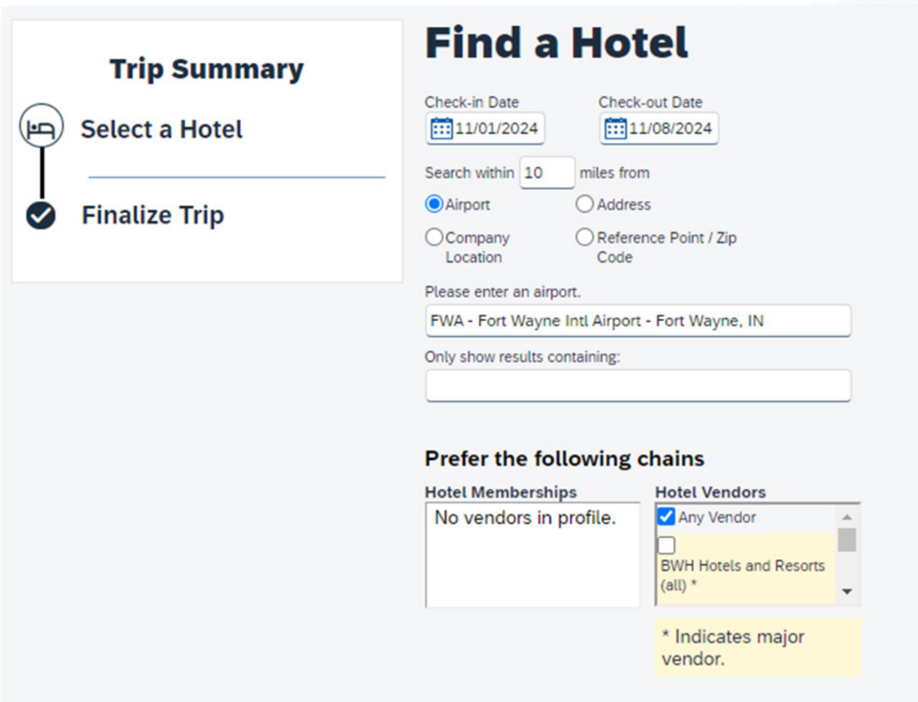
Select - View Trips



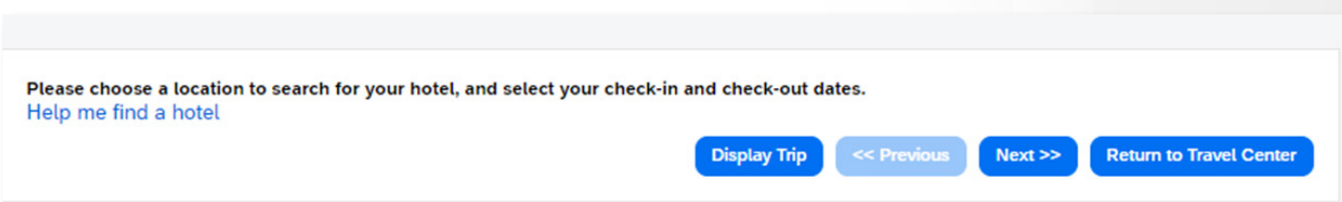
Select - The trip you'd like to add a hotel to



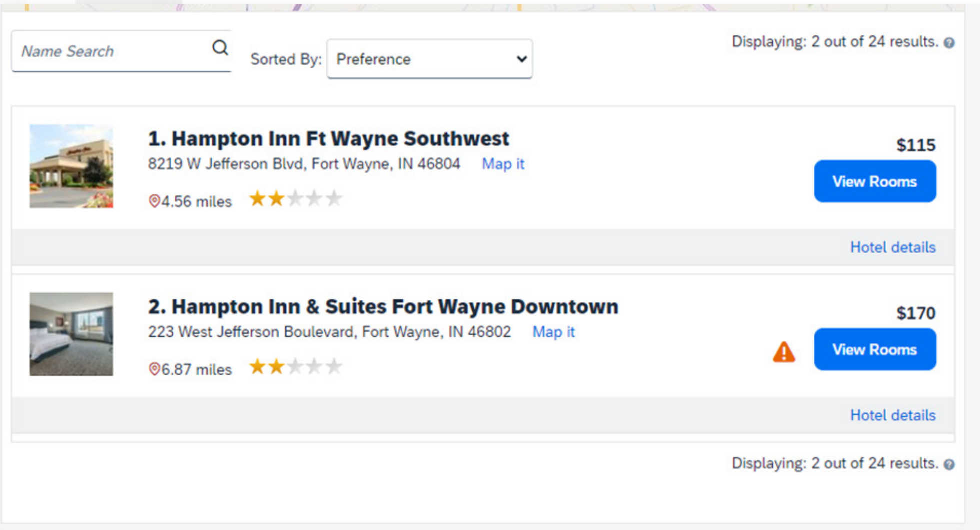
Select - Book and Continue



Here you should enter the check-in and check-out dates if they differ from your created trip. Additionally, you can change how you'd like to search for hotel as in this example within 10 miles of Fort Wayne International Airport. If you have a preferred hotel brand you can select them from the Hotel Vendors list.

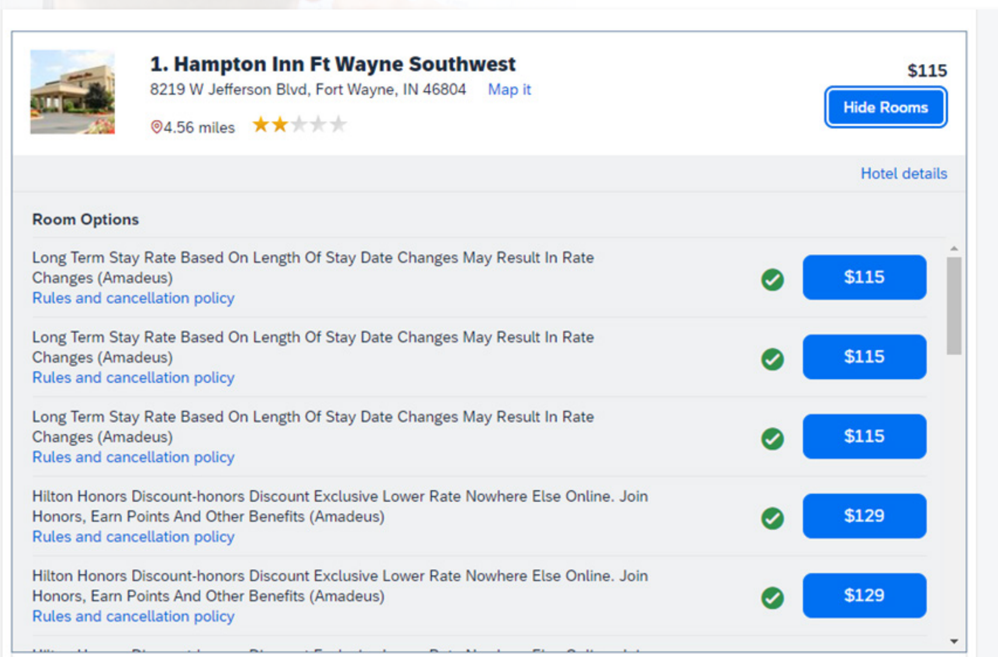


Select - Next



NOTE: For this example, there are 2 available hotels for dates selected. Note that any hotel outside the policy will be flagged by a caution triangle. In this case, this hotel is higher than $130 per night policy.

Select - View Rooms



Select - View Rooms

NOTE: You should pick the lowest cost room available

Click the box accepting the hotel's rate rules, restrictions and cancellation policy

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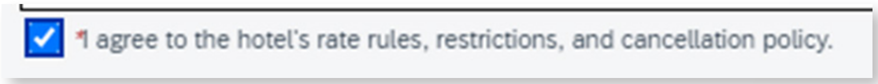
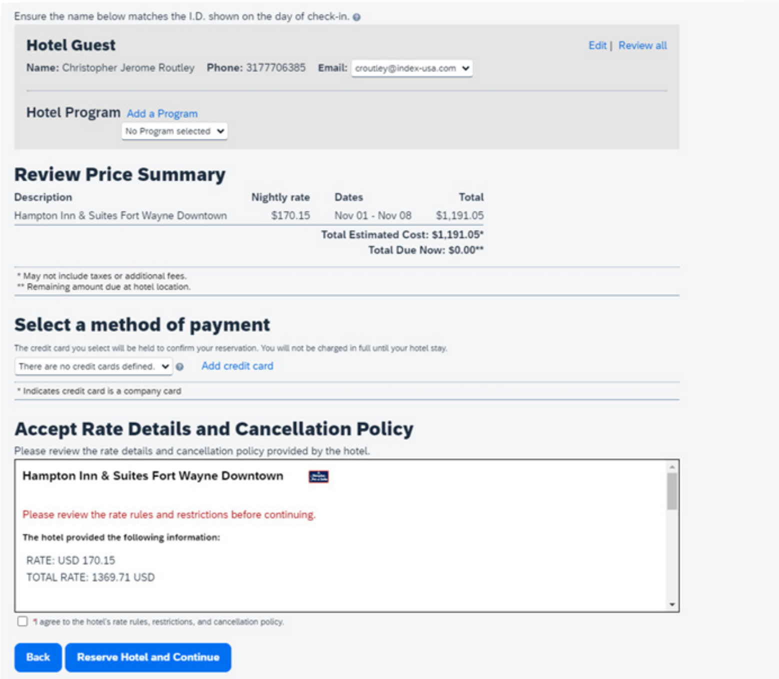
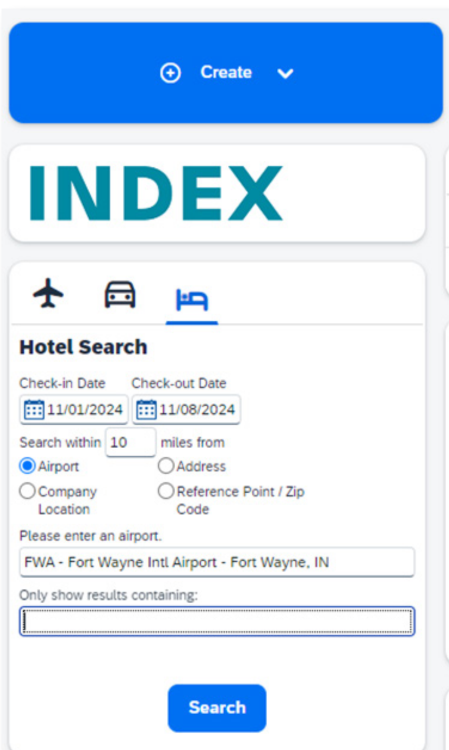




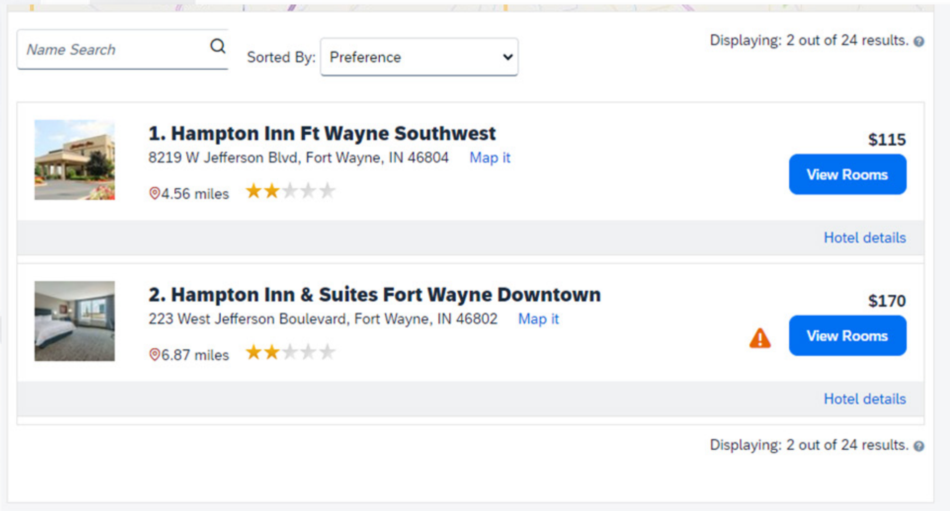
Select - Reserve Hotel and Continue

Method 2:



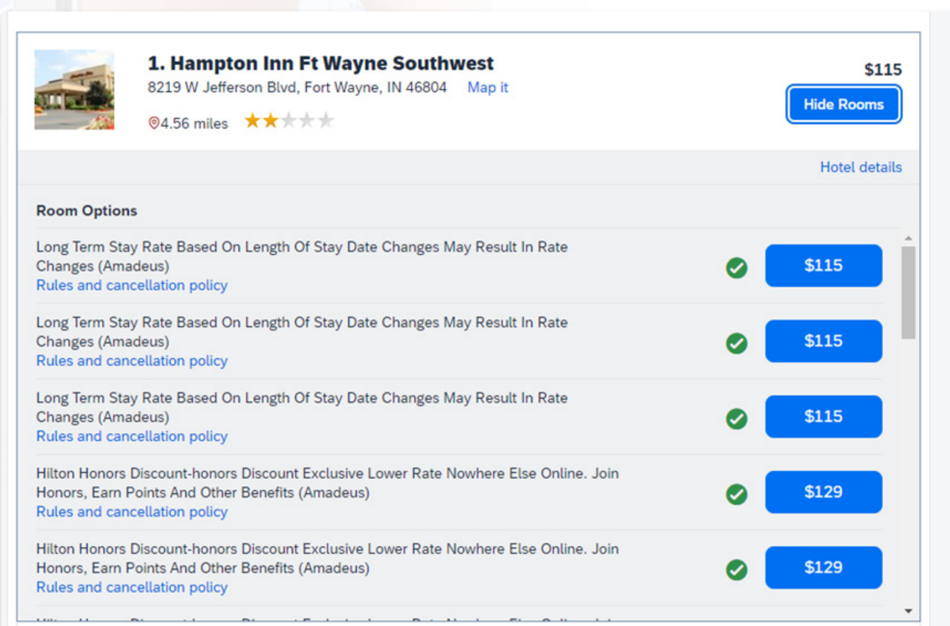
Enter the check-in date, check-out date and search criteria

Select - Search



NOTE: For this example, there are 2 available hotels for the dates selected. Note that any hotel outside the policy will be flagged by a caution triangle. In this case, this hotel is higher than the $130 per night policy

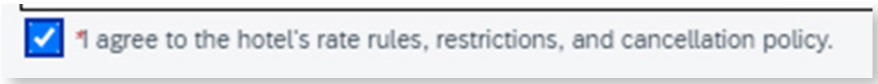
Select - View Rooms

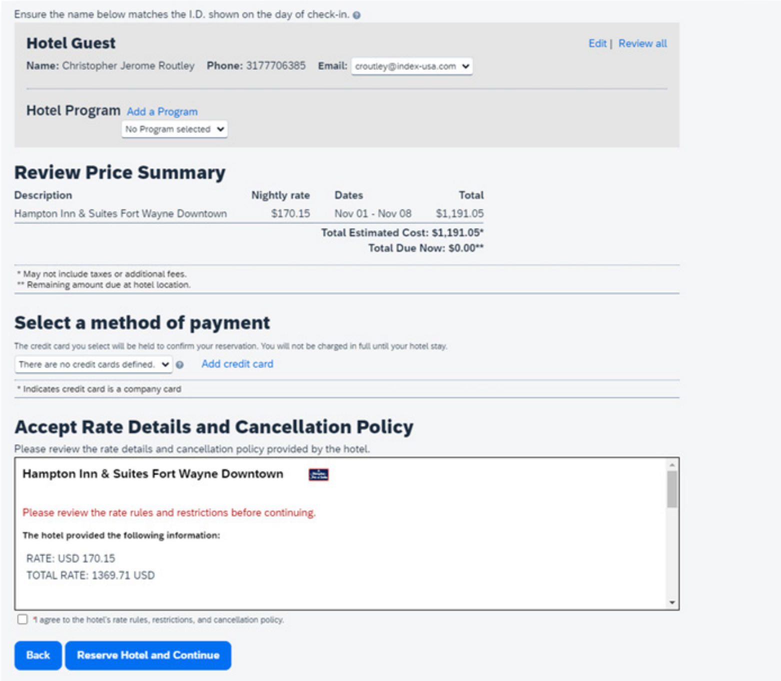


Select - View Rooms

NOTE: You should pick the lowest cost room available

Click the box accepting the hotel’s rate rules, restrictions and cancellation policy





Select - Reserve Hotel and Continue

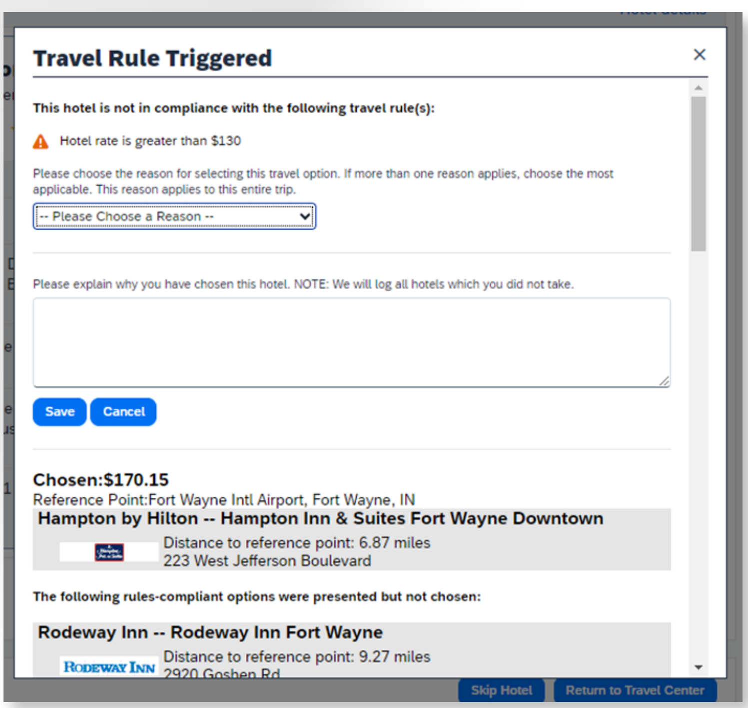
Policy Violation:

If you are selecting a hotel outside policy follow the below steps.

Select - View Rooms

Select - Your room option

NOTE: You should pick the lowest cost room available



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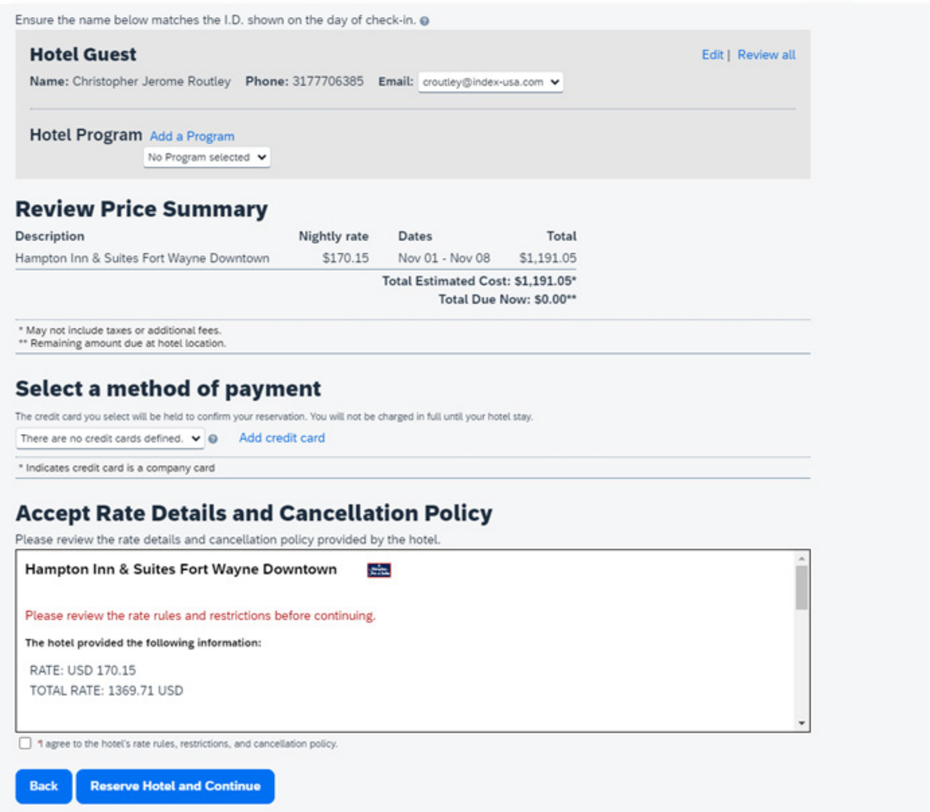
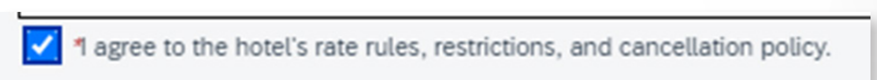
Here you will need to select the reason that most closely matches your justification for selecting this option outside of policy. Then you will need to provide a brief justification detailing the specific reason.



Click the box accepting the hotel's rate rules, restrictions and cancellation policy.



Select - Reserve Hotel and Continue.

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