

Technician Association Wizard

Routing Step Associations Guide

How to assign, update, and remove technician routing step associations from the Evolution Users form.

The Evolution **Users** form lets you quickly assign Routing Steps to one or more technicians using the **Tech Association Wizard**. This guide covers opening the wizard, and adding, updating, and removing technician routing step associations.

Opening the Tech Association Wizard

1. From the **Maintenance** menu, choose **Users** to open the Users form. Select and highlight the user. Confirm the **Is Technician** flag is checked for this user, and **Save** your changes if necessary.

The screenshot shows the 'Users' form in the Evolution software. On the left is a table of users. The 'Becky Fuller' user is selected. On the right, the 'Routing Step Associations' tab is active, displaying the 'Tech Association Wizard' interface. This interface includes fields for user details, security settings, contact information, location, default printers, pay level, and capacity planning. The 'Is Technician' checkbox is checked.

Full Name	User Name	Tech Id	Location
administrator	admin	12345	Greater
Angie Rich	Angie2	79	Greater
Anissa Russell	Anissa	4321	Greater
Barbara Cooper	Barb	343	Greater
Barbara Knighton	barbara		Greater
Becky Fuller	BFuller	1234	Greater
Becky Hulsey	Becky2	656	Greater
Betty Morgan	Betty	82	Greater
Beverly Gray	BeverlyG	132	Greater
Beverly Jones	BeverlyJ	340	Greater
Bill Cannon	Bill C	38	Greater
Bill Hardy	Bill	326	Greater
Bob Shultz	Bob2		Greater
Bonni Davis	Bonni	286	Greater
Brenda Dobbs	Brenda	118	Greater
Caraline Barker	Caraline	142	Greater
Carla Dorrene	Carla	189	Greater
Caroline Trip	Caroline	262	Greater
Charlotte Patterson	Charlotte	267	Greater
Chris Cross	ChrisC	96	Greater
Chris Graves	ChrisG	394	Greater
Christian McGrath	christianm	389	Greater
Cindy Moore	Cindy	48	Greater
Connie Castman	Connie	349	Greater
Cory Banks	Cory	210	Greater
Crystal Walker	Crystal W	27	Greater
Cyndie Bates	Cyndie	199	Greater
David Dash	DavidD	233	Greater
David Tanner	DavidT	157	Greater

Users

User Details **Routing Step Associations** **Recipe/PayRate Associations**

User name: BFuller Full name: Becky Fuller ☐ Is Inactive ☒ Is Sales Person
Password: <password> Tech Touchscreen Logon ID: 1234 ☐ Shipping-NO Time clock ☐ Is Manager
☐ Interim Receiving ☒ Is Technician
☐ Use Dynamic Display ☒ Is Multi-Location
☐ Use Unit Limited Display
☐ Use Scan Case Metal Entry
☐ Block Invoice Price Change

[Security Settings]
Profile: Technicians

[Contact Info]
Home Phone: Cell Phone: eMail: Page/Text Msg:

[Location]
Greater Dental Lab

[Default Printers]
Invoice Printer: Work Ticket Printer: Certificate Printer: Disclosure Printer:

[Pay Level]
☒ Hourly Rate: \$25.00
☐ Production

[Capacity Planning]
Daily capacity (mins): 400
Percentage of Capacity: Manager: Larry Broome

Add New Save

2. Select the **Routing Step Associations** tab, then click the **Tech Association Wizard** button.

Full Name	User Name	Tech Id	Location
administrator	admin	12345	Greater
Angie Rich	Angie2	79	Greater
Anissa Russell	Anissa	4321	Greater
Barbara Cooper	Barb	343	Greater
Barbara Knighton	barbara		Greater
Becky Fuller	BFuller	1234	Greater
Becky Hulsey	Becky2	656	Greater
Betty Morgan	Betty	82	Greater
Beverly Gray	BeverlyG	132	Greater
Beverly Jones	BeverlyJ	340	Greater
Bill Cannon	Bill C	38	Greater
Bill Hardy	Bill	326	Greater
Bob Shultz	Bob2		Greater
Bonni Davis	Bonni	286	Greater
Brenda Dobbs	Brenda	118	Greater
Caraline Barker	Caraline	142	Greater
Carla Dorrene	Carla	189	Greater
Caroline Trip	Caroline	262	Greater
Charlotte Patterson	Charlotte	267	Greater
Chris Cross	ChrisC	96	Greater
Chris Graves	ChrisG	394	Greater
Christian McGrath	christianm	389	Greater
Cindy Moore	Cindy	48	Greater
Connie Castman	Connie	349	Greater
Cory Banks	Cory	210	Greater
Crystal Walker	Crystal W	27	Greater
Cyndie Bates	Cyndie	199	Greater
David Dash	DavidD	233	Greater
David Tanner	DavidT	167	Greater

- Choose one of three options: **Add New Associations**, **Update Existing Associations**, or **Remove Existing Associations**.

Assignment Options

These options appear whenever you add or update routing step associations. All steps added or updated at the same time must use the same Assignment Option.

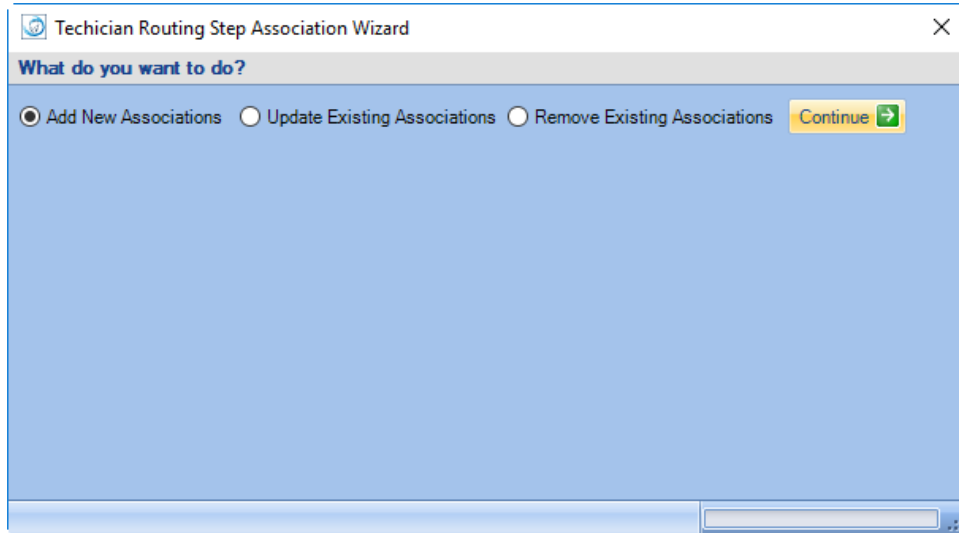
- **None** — no special behavior; this is the default.
- **Manually Scheduled** — for any step you do NOT want the system to auto-assign to this technician. Also used to assign cases to trainees.
- **Auto Pre-assign** — when a tech can complete several steps, the remaining steps pre-assign as the case is checked in by the tech, whether or not the steps are consecutive.
- **Disregard Skill Level for Clustering** — for a step that should be assigned when other steps are present, regardless of the tech's skill level.
- **Cluster Only** — for any step you do NOT want auto-assigned by the system, EXCEPT when it is part of a cluster.
- **Preferred Doctors Only** — when a doctor requests a specific technician or tech team.

More detail:

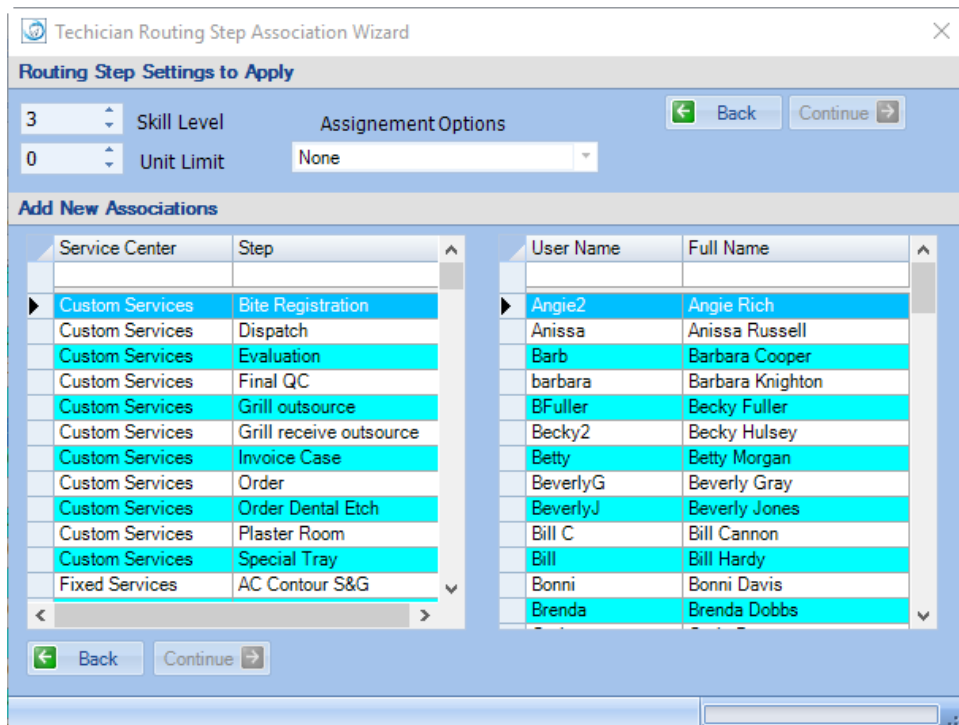
Ask ABS Support for a walkthrough of how clustering assigns routing steps across a case.

Adding New Associations

1. For a new user, choose **Add New Associations**, then click **Continue**.



2. Define the Routing Step Settings to apply: select a **Skill Level** and an **Assignment Option** (see Assignment Options above). All steps added at the same time must use the same settings — if steps need different skill levels, add them first, then edit each assigned step individually. Set a **Unit Limit** if your lab uses that feature. Click **Continue**.



3. Available routing steps appear on the left; available technicians appear on the right. Only users with the **Is Technician** flag active appear as options. Use **Shift** and/or **Ctrl** on your keyboard to select one or more routing steps, then one or more technicians.

Technician Association Wizard

The screenshot shows the 'Technician Routing Step Association Wizard' dialog box. It has a title bar with a close button. The main area is divided into two sections: 'Routing Step Settings to Apply' and 'Add New Associations'. In the 'Routing Step Settings to Apply' section, there are two dropdown menus: 'Skill Level' set to '3' and 'Unit Limit' set to '0'. To the right of these is a label 'Assignment Options' and a dropdown menu set to 'None'. There are 'Back' and 'Continue' buttons. The 'Add New Associations' section contains two tables. The first table has columns 'Service Center' and 'Step', with rows for 'Fixed Services' and various steps like 'Reduction Matrix', 'Scan', 'Shade Appointment', 'Shipping', 'Sinter', 'Soft Tissue', 'Stack Porcelain', 'Stain & Glaze', 'Strip Porc', 'Stump', 'Temp Matrix', and 'test'. The second table has columns 'User Name' and 'Full Name', with rows for various users like 'Angie2', 'Anissa', 'Barb', 'barbara', 'BFuller', 'Becky2', 'Betty', 'BeverlyG', 'BeverlyJ', 'Bill C', 'Bill', 'Bonni', and 'Brenda'. There are 'Back' and 'Continue' buttons at the bottom.

4. Click **Continue**. A green status bar appears as the system adds the data — the new steps will not appear on the Users form until you close the wizard.

The screenshot shows the 'Users' form with the 'Technician Routing Step Association Wizard' dialog box open. The 'Users' form has a table with columns 'Full Name', 'User Name', 'Tech Id', and 'Location'. The 'Technician Routing Step Association Wizard' dialog box is the same as the one in the previous screenshot. The 'Users' form also has tabs for 'User Details', 'Routing Step Associations', and 'Recipe/PayRate Associations'. The 'Routing Step Associations' tab is active, showing 'Available Routing Steps' and 'Assigned Routing Steps'. The 'Assigned Routing Steps' table has columns 'Step' and 'Service Center', with a row for 'Add Retainer Wires' and 'Orthodontics'. There are 'Manually Scheduled', 'Auto Preassign', 'Disregard Skill Level For Clustering', 'Cluster Only', 'Preferred Doctors Only', and 'None' options. A 'Save' button is at the bottom right.

Note:

Click **Back** to change settings, or go back again to choose a different option. You can continue to add, edit, or remove steps before closing the wizard.

Technician Association Wizard

- When finished, click the **X** to close the Technician Routing Step Association Wizard.
- The **Assigned Routing Steps** grid on the Users form now shows the associations you added. If you added steps for more than one technician, navigate to each technician to see their assignments. Select a step to change any values, and always **Save** your changes.

The screenshot shows the 'Users' form with the 'Routing Step Associations' tab selected. The 'Users' table on the left lists technicians with columns for Full Name, User Name, Tech Id, and Location. The 'Routing Step Associations' tab on the right shows two grids: 'Available Routing Steps' and 'Assigned Routing Steps'. The 'Available Routing Steps' grid lists various steps like AC Contour S&G, AC Stack, AC Strip, AC Wax Spru Inv, Acrylic, Adapt W/W, Art Effects, Articulate, Base Rim, Bend, and Bisque Bake, each with a 'Service Center' value. The 'Assigned Routing Steps' grid shows the steps assigned to the selected technician, including 'Add Retainer Wires', 'Sinter', 'Stack Porcelain', 'Stain & Glaze', and 'Strip Porc', all with 'Fixed Services' as the service center. Below the grids are 'Routing Step Settings' including 'Tech Skill Level' (radio buttons 1-6, with 3 selected), 'Unit Limit' (0 or No Unit Limit), and 'Manually Scheduled' (radio buttons for Manually Scheduled, Auto Preassign, Disregard Skill Level For Clustering, Cluster Only, Preferred Doctors Only, and None). At the bottom are 'Tech Association Wizard' and 'Save' buttons.

Updating Existing Associations

- Choose **Update Existing Associations** and click **Continue**.

The screenshot shows the 'Technician Routing Step Association Wizard' dialog box. The 'What do you want to do?' section has three radio buttons: 'Add New Associations', 'Update Existing Associations' (selected), and 'Remove Existing Associations'. A 'Continue' button with a green arrow is to the right.

- Select the **Assignment Option** to apply (see Assignment Options above) and click **Continue**.

The screenshot shows the 'Routing Step Settings to Apply' window. It has a title bar with a close button. Below the title bar is a section with two dropdown menus: 'Skill Level' (set to 2) and 'Unit Limit' (set to 0). To the right of these is a section titled 'Assignment Options' with a dropdown menu currently set to 'None'. A list of options is visible: 'None', 'Manually Scheduled', 'Auto Preassign', 'Disregard Skill Level For Clustering', 'Cluster Only', and 'Preferred Doctors Only'. At the top right are 'Back' and 'Continue' buttons. At the bottom right is a scroll bar.

3. Select the step from the grid on the left.

The screenshot shows the 'Update Existing Associations' window. It has a title bar with a close button. Below the title bar is a section with two dropdown menus: 'Skill Level' (set to 2) and 'Unit Limit' (set to 0). To the right of these is a section titled 'Assignment Options' with a dropdown menu currently set to 'None'. At the top right are 'Back' and 'Continue' buttons. Below this is a section titled 'Update Existing Associations' with a table. The table has two columns: 'Service Center' and 'Step'. The table contains several rows of data, including 'Fixed Services' and 'Shade Appointment'. A 'Show Techs' button is located to the right of the table. At the bottom left are 'Back' and 'Continue' buttons. At the bottom right is a scroll bar.

Service Center	Step
Fixed Services	Shade Appointment
Fixed Services	Shipping
Fixed Services	Sinter
Fixed Services	Soft Tissue
Fixed Services	Stack Porcelain
Fixed Services	Stain & Glaze
Fixed Services	Strip Porc
Fixed Services	Stump
Fixed Services	Temp Matrix
Fixed Services	test
Fixed Services	test2
Fixed Services	test3

4. Click the **Show Techs** button to display all technicians associated with that step.

The screenshot shows the 'Update Existing Associations' screen of the Technician Routing Step Association Wizard. At the top, the title bar reads 'Technician Routing Step Association Wizard'. Below it, the section 'Routing Step Settings to Apply' contains two dropdown menus: 'Skill Level' set to '2' and 'Unit Limit' set to '0'. To the right of these is an 'Assignment Options' dropdown set to 'None'. Navigation buttons 'Back' and 'Continue' are on the right. The main area is titled 'Update Existing Associations' and features two tables. The left table has columns 'Service Center' and 'Step', with a 'Show Techs' button to its right. The right table has columns 'User Name' and 'Full Name'. Both tables contain a list of entries, with the 'Fixed Services' row in the left table and the 'Barb' row in the right table highlighted in blue. At the bottom, there are 'Back' and 'Continue' buttons.

Service Center	Step	User Name	Full Name
Fixed Services	Shade Appointmer	Barb	Barbara Cooper
Fixed Services	Shipping	BFuller	Becky Fuller
Fixed Services	Sinter	Becky2	Becky Hulsey
Fixed Services	Soft Tissue	BeverlyG	Beverly Gray
Fixed Services	Stack Porcelain	Bill C	Bill Cannon
Fixed Services	Stain & Glaze	Caroline	Caroline Trip
Fixed Services	Strip Porc	ChrisC	Chris Cross
Fixed Services	Stump	Cindy	Cindy Moore
Fixed Services	Temp Matrix	Denise	Denise Lillian
Fixed Services	test	Eric	Eric Petty
Fixed Services	test2	George	George Mason
Fixed Services	test3	Jeff	Jeff Dorament
Fixed Services	test3	Margo	Margo Stamm

5. Select one or more technicians and change all their selections at once.

Removing Existing Associations

1. Choose **Remove Existing Associations**, then click **Continue**.

The screenshot shows the 'What do you want to do?' screen of the Technician Routing Step Association Wizard. The title bar reads 'Technician Routing Step Association Wizard'. Below the title, the question 'What do you want to do?' is displayed. There are three radio buttons: 'Add New Associations', 'Update Existing Associations', and 'Remove Existing Associations'. The 'Remove Existing Associations' radio button is selected. To the right of the radio buttons is a yellow 'Continue' button with a green arrow. The rest of the screen is a large empty blue area. At the bottom, there is a 'Back' button and a 'Continue' button.

2. Select one or more steps to remove, then click **Show Techs** to see all the technicians associated with those steps.

Technician Association Wizard

The screenshot shows the 'Remove Existing Associations' step of the 'Technician Routing Step Association Wizard'. On the left, a table lists service centers and their associated steps. On the right, a table lists technicians. A 'Show Techs' button is located between the two tables. At the bottom are 'Back' and 'Continue' buttons.

Service Center	Step
Fixed Services	Prod Units Test
Fixed Services	Quality Control (A)
Fixed Services	Quality Control (C)
Fixed Services	Reduction Matrix
Fixed Services	Scan
Fixed Services	Shade Appointment
Fixed Services	Shipping
Fixed Services	Sinter
Fixed Services	Soft Tissue
Fixed Services	Stack Porcelain
Fixed Services	Stain & Glaze
Fixed Services	Strip Porc

Show Techs

User Name	Full Name
Barb	Barbara Cooper
BFuller	Becky Fuller
Becky2	Becky Hulsey
BeverlyG	Beverly Gray
Bill C	Bill Cannon
Caroline	Caroline Trip
ChrisC	Chris Cross
Cindy	Cindy Moore
Denise	Denise Lillian
Eric	Eric Petty
George	George Mason
Jeff	Jeff Dorament
Margo	Margo Stamm

Back Continue

3. Select one or more technicians from the grid on the right, then click **Continue**.

The screenshot shows the 'Select Technician(s)' step of the 'Technician Routing Step Association Wizard'. The left table is the same as in the previous screenshot. The right table now has several rows highlighted in blue, indicating selected technicians. The 'Continue' button is highlighted in yellow.

Service Center	Step
Fixed Services	Prod Units Test
Fixed Services	Quality Control (A)
Fixed Services	Quality Control (C)
Fixed Services	Reduction Matrix
Fixed Services	Scan
Fixed Services	Shade Appointment
Fixed Services	Shipping
Fixed Services	Sinter
Fixed Services	Soft Tissue
Fixed Services	Stack Porcelain
Fixed Services	Stain & Glaze
Fixed Services	Strip Porc

Show Techs

User Name	Full Name
Barb	Barbara Cooper
BFuller	Becky Fuller
Becky2	Becky Hulsey
BeverlyG	Beverly Gray
Bill C	Bill Cannon
Caroline	Caroline Trip
ChrisC	Chris Cross
Cindy	Cindy Moore
Denise	Denise Lillian
Eric	Eric Petty
George	George Mason
Jeff	Jeff Dorament
Margo	Margo Stamm

Back Continue

4. Close the Technician Routing Step Association Wizard. When you check the technician(s), you will see that these steps are no longer associated.

Technician Association Wizard

The screenshot shows the 'Technician Association Wizard' application. On the left, a table lists users with columns for Full Name, User Name, Tech Id, and Location. The 'Routing Step Associations' tab is active, showing a list of available routing steps and their service centers. On the right, there are settings for 'Routing Step Settings' and 'Assigned Routing Steps'.

Full Name	User Name	Tech Id	Location
administrator	admin	12345	Greater Der
Angie Rich	Angie2	79	Greater Der
Anissa Russell	Anissa	4321	Greater Der
Barbara Cooper	Barb	343	Greater Der
Barbara Knighton	barbara		Greater Der
Becky Fuller	BFuller	1234	Greater Der
Becky Hulsey	Becky2	656	Greater Der
Betty Morgan	Betty	82	Greater Der
Beverly Gray	BeverlyG	132	Greater Der
Beverly Jones	BeverlyJ	340	Greater Der
Bill Cannon	Bill C	38	Greater Der
Bill Hardy	Bill	326	Greater Der
Bob Shultz	Bob2		Greater Der
Bonni Davis	Bonni	286	Greater Der
Brenda Dobbs	Brenda	118	Greater Der
Caroline Barker	Caroline	142	Greater Der
Carla Dorrene	Carla	189	Greater Der
Caroline Trip	Caroline	262	Greater Der
Charlotte Patterson	Charlotte	267	Greater Der
Chris Cross	ChrisC	96	Greater Der
Chris Graves	ChrisG	334	Greater Der
Christian McGrath	christianm	389	Greater Der
Cindy Moore	Cindy	48	Greater Der
Connie Castman	Connie	349	Greater Der
Cory Banks	Cory	210	Greater Der
Crystal Walker	Crystal W	27	Greater Der
Cyndie Bates	Cyndie	199	Greater Der
David Dash	DavidD	233	Greater Der
David Tranter	DavidT	167	Greater Der

Routing Step Associations

Available Routing Steps:

Step	Service Center
AC Contour S&G	Fixed Services
AC Stack	Fixed Services
AC Strip	Fixed Services
AC Wax Spru Inv	Fixed Services
Acrylic	Orthodontics
Adapt W/W	Removable Partial
Art Effects	Fixed Services
Articulate	Removable Dentu
Base Rim	Removable Dentu
Bend	Orthodontics
Bisque Bake	Fixed Services

Assigned Routing Steps:

Step	Service Center
Add Retainer Wires	Orthodontics
Sinter	Fixed Services
Strip Porc	Fixed Services

Routing Step Settings

Tech Skill Level: ☐ 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5 ☐ 6

Unit Limit: 0 - No Unit Limit

☒ Manually Scheduled
☐ Auto Preassign
☐ Disregard Skill Level For Clustering
☐ Cluster Only
☐ Preferred Doctors Only
☐ None

Tech Association Wizard Save

Need help?

If you have any questions using the Tech Association Wizard, our team is happy to help.

Atlanta Based Systems Support

(800) 476-2097, Option 1

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www.atlantabasedsystems.com