

## STEPS TO HANDLE IDLE TECHNICIAN

Load technician using the Additional Panel


1. Click Additional Panels on FS Scheduler

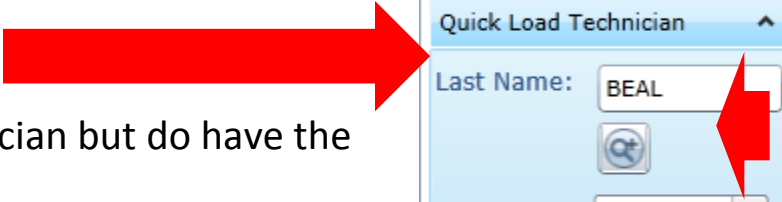
The screenshot displays the ClickSoftware FS Scheduler interface. The top menu bar includes 'Menu', 'View', 'Schedule', 'Monitor', 'Workload Management', and 'Help'. Below the menu is a toolbar with various icons and a dropdown menu set to '01 Standard For Optimizer'. The main interface is divided into several panels:

- Navigation Panel (Left):** Contains a 'Calendar' section with date pickers for 'From' (12/2/2017) and 'To' (12/2/2017). Below this is the 'Business Structure' section, which lists a hierarchy of locations: 'ALEXANDRIA LA' (expanded), 'LA05\_MULTIBAND', 'LA05\_MULTIBAND\_EMPATH', 'LA05\_MULTIBAND\_emPath LLC', 'LA08\_MULTIBAND', 'LA08\_MULTIBAND\_EMPATH', and 'LA08\_MULTIBAND\_emPath LLC'. Other locations listed include ALPENA MI, BANGOR ME, BATON ROUGE LA, BEAUMONT TX, BOSTON MA, BURLINGTON VT, CHAMPAIGN IL, CINCINNATI OH, CLEVELAND OH, DAVENPORT IA, DETROIT MI, and EVANSVILLE IN.
- Technician Gantt (21) Panel (Center):** Displays a Gantt chart for Saturday, December 02, 2017. The chart shows time slots from 7:00 AM to 12:00 PM. Technicians listed include KIMBERLY STUDEBAKER, ETHAN RADA, BENJAMIN LIVENGOD, RICHARD BEAL, WILLIAM ARCHER, TODD GULLORY, BEAU, and MICHAEL. Tasks are assigned to these technicians, including 'New Install', 'Routing', 'LOA', and 'Upgrade'.
- Map Panel (Right):** Shows a map of the area with yellow lines representing roads and red lines representing routes. A large red arrow points from the 'Additional Panels' button on the right towards the map.
- Additional Panels Panel (Bottom Right):** A table showing work time and appointments. The table has two columns: 'Work Time' and 'Appointment'. The data rows are as follows:

Work Time	Appointment
1:15	12/2/2017
1:15	12/2/2017
1:30	12/2/2017
2:15	
2:40	12/2/2017
4:55	12/2/2017
2:25	12/2/2017
2:30	12/2/2017
2:20	12/2/2017
2:40	

2. Click the Quick Load Technician Button and if you have the Technicians Last Name **PROPERLY SPELLED OUT**, Enter it in the Last Name field in full caps.

3. If you do not have the last name of the technician but do have the Tech ID click the magnifying glass icon 



Additional Panels

Alerts

All Alerts (0)

Status Activity ID Alert Type

Quick Load Technician

Last Name: BEAL

From: 12/2/2017

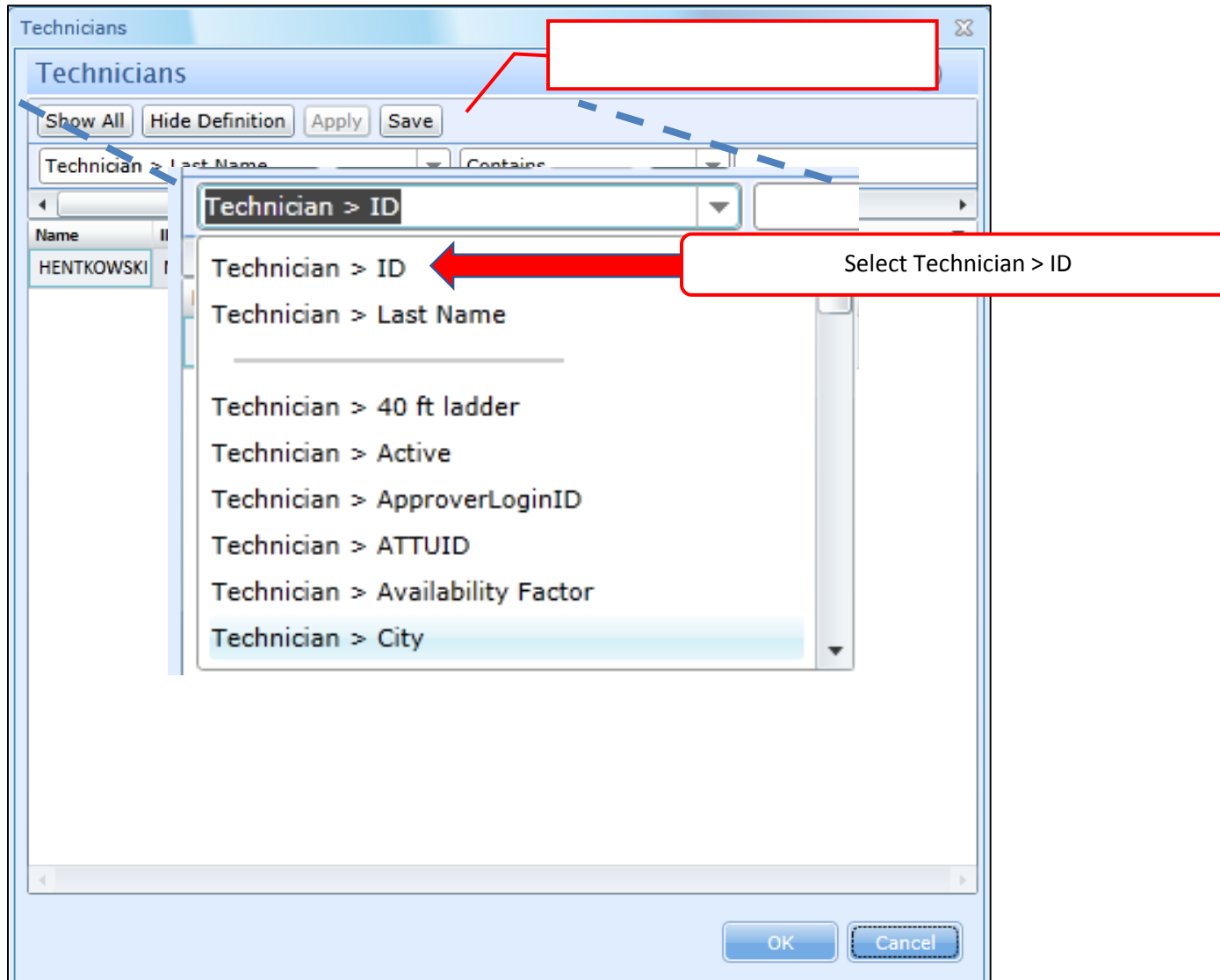
To: 12/2/2017

Load

Reload previous loaded data

Additional Panels

4. Once you click on the magnifying glass icon, the below page will pop up.



5. Ensure that your criteria tab says **Contains** and Enter the Tech ID given to you and click Apply.

Show All Hide Definition Apply Save

Technician > ID Contains 33376

Equals  
Equals One Of  
Contains  
Is Undefined

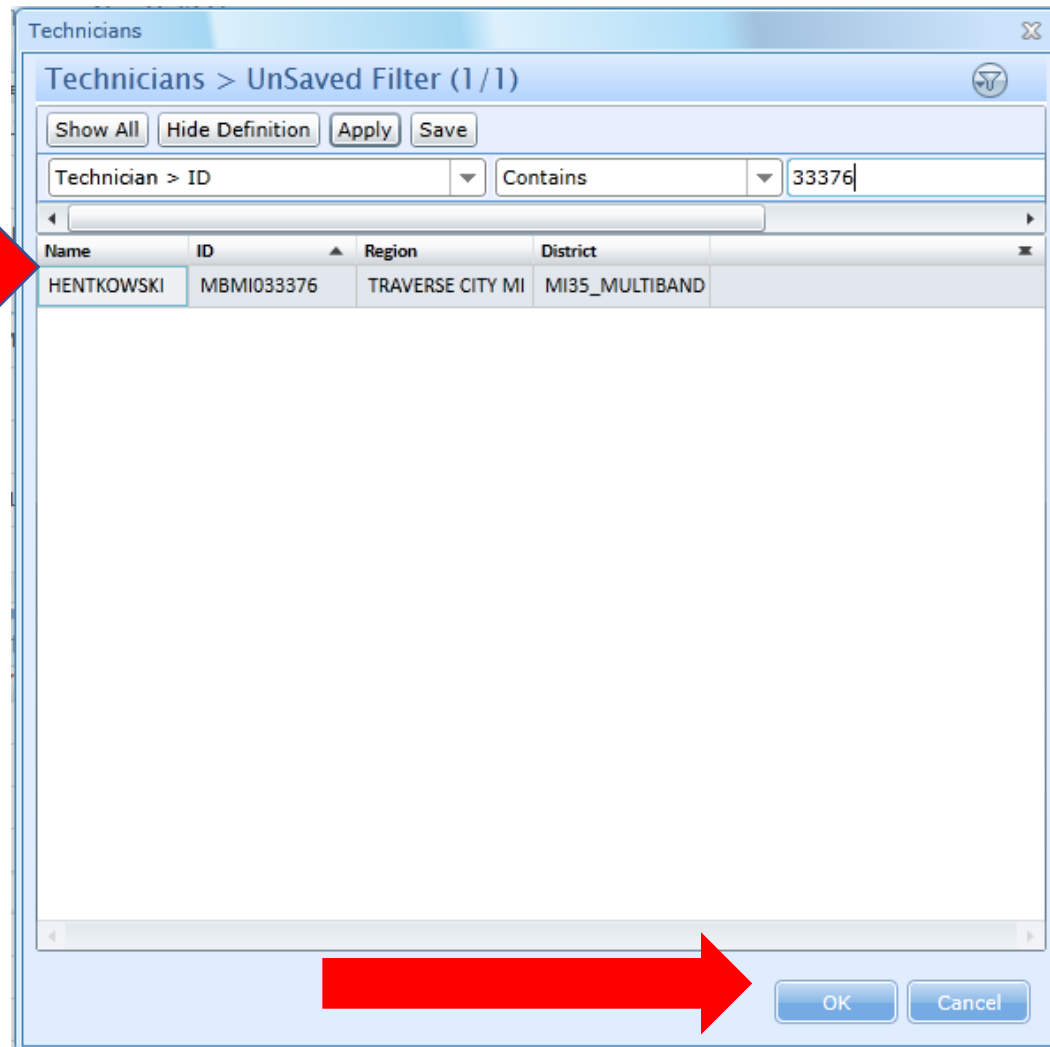
Name	ID	Region
HENTKOWSKI		

OK Cancel

TECHNICIAN ID GOES  
HERE

Note: Just the numbers in the technician ID can be entered (*as seen in the image*) or the entire ID including the letter code (*for example MBKY056189*) can be entered in the tab

6. The results will load in the table below the search criteria. Select it by clicking on it and click OK.



The screenshot shows a software window titled "Technicians" with a subtitle "Technicians > UnSaved Filter (1 / 1)". At the top, there are buttons for "Show All", "Hide Definition", "Apply", and "Save". Below these is a search filter section with a dropdown menu set to "Technician > ID", a comparison operator dropdown set to "Contains", and a text input field containing "33376". A table below the search criteria displays the search results. A large red arrow points to the first row of the table. The table has four columns: "Name", "ID", "Region", and "District". The first row contains the following data:

Name	ID	Region	District
HENTKOWSKI	MBMI033376	TRAVERSE CITY MI	MI35_MULTIBAND

At the bottom right of the window, there are "OK" and "Cancel" buttons. A second large red arrow points to the "OK" button.

7. Once you click OK, you'll be taken back to the Additional Panels. Ensure that the dates you are looking at are correct. Click Load and your technician Information will load on your Technician Gantt.



**Additional Panels**

Alerts

All Alerts (2)

Status	Activity ID	Alert Type
	1-2RVBOWW4	Unassigned
	1-2S0G9TBG	Unassigned

Quick Load Technician

Last Name:

From:

To:

[Reload previous loaded data](#)

Additional Panels

## 8. Technician information will Load on Technician Gantt

ClickSoftware  
Making Service Click

Main View Schedule Monitor Workload Management Help

01 Standard For Optimizer

X Previous Next Options

Navigation

Calendar

From: 12/2/2017 To: 12/2/2017

Load/Unload Immediately

- BANGOR ME
- BATON ROUGE LA
- BEAUMONT TX
- BOSTON MA
- BURLINGTON VT
- CHAMPAIGN IL
- CINCINNATI OH
- CLEVELAND OH
- DAVENPORT IA
- DETROIT MI
- EVANSVILLE IN
- FLINT MI
- GRAND RAPIDS MI
- HOUSTON TX 1
- HOUSTON TX 2
- INDIANAPOLIS IN
- JACKSON TN
- LAFAYETTE IN
- LAFAYETTE LA
- LAKE CHARLES LA
- LANSING MI

Technician Gantt > UnSaved Filter (1) Last refresh: 12/2/2017 1:33:30 PM

Show All Hide Definition Apply Save

Technician > Last Name Equals HENTKOWSKI

Saturday, December 02, 2017

First Name	Last Name	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM
LUKE	HENTKOWSKI		Serv	New Install		Service	Ser

29° 56' 02.27" N 95° 41' 32.24" W 0.5 mi

Activity List (30)

Sche	NRC	Address Change	Activity #	Sub Activity #	MTA Type	Order Sub Type	Status	Tech Team	Work Time	Appointm
	0		M7315008550		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		M7315008552		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		M7315008566		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		M7315008569		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		M7306004846		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		M7315008628		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		M7315008634		Not Defined	New Install	Customer Unshed	Not Defined	0:00	
	0		1-2RP9ASG3		Not Defined	Upgrade	Closed	MB000212	3:15	12/2/2017
	0		M7315008691		Not Defined	New Install	Customer Unshed	Not Defined	3:20	
	0		1-2RZAKQDP		Not Defined	Upgrade	Closed	MB000212	3:20	12/2/2017
	0		1-2R7SIJF8		Not Defined	Service	Closed	MR000212	1:15	12/2/2017

Task List uns JEP

Additional Panels

## Scheduling Idle Technician

1. On the Technician Gantt, Right Click the Technician Name and Click "Schedule Idle Technician"

Technician Gantt (4) Last refresh: 12/4/2017 7:22:18 AM

Saturday, December 02, 2017

First Name Last Name 7:00 AM 8:00 AM 9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM 3:00 PM 4:00 P

LUKE HENTKO [Serv] [New Install] [Servic] [Service] [End of Day]

CRAIG [New Install] [Upgrade] [End of Day]

JOSHUA [New Install] [End of Day]

JAMES [Military Leave]

Map: 29° 55' 55.84" N 95° 37' 33.70" W

Activity # Sub Activity # MTA Type Order Sub Type Status Tech Team Work Time Appointment Start Appointment Finish Assignment Start Assignment Finish

1-2RTWT8CQ		Not Defined	Upgrade	Closed	MB000212	1:10	12/2/2017 8:00 AM	12/2/2017 12:00 PM	12/2/2017 8:56 AM	12/2/2017 9:50
M7331003038		Not Defined	New Install	Closed	MB000212	3:25	12/2/2017 8:00 AM	12/2/2017 12:00 PM	12/2/2017 8:03 AM	12/2/2017 10:0
1-2RXG7585		Not Defined	Upgrade	Cancelled	Not Defined	2:10	12/2/2017 8:00 AM	12/2/2017 12:00 PM		
1-2RY42ZW6		Not Defined	New Install	Cancelled	Not Defined	2:40				
1-2RP9ASG3		Not Defined	Upgrade	Closed	MB000212	3:15	12/2/2017 8:00 AM	12/2/2017 12:00 PM	12/2/2017 10:22 AM	12/2/2017 11:4
1-2RZAKQDP		Not Defined	Upgrade	Closed	MB000212	3:20	12/2/2017 12:00 PM	12/2/2017 4:00 PM	12/2/2017 1:05 PM	12/2/2017 1:54
1-2RZSU3F8		Not Defined	Service	Closed	MB000212	1:15	12/2/2017 12:00 PM	12/2/2017 4:00 PM	12/2/2017 12:38 PM	12/2/2017 1:26
1-2S02FJNO		Not Defined	Service	Closed	MB000212	1:30	12/2/2017 8:00 AM	12/2/2017 12:00 PM	12/2/2017 7:54 AM	12/2/2017 8:27
M7335003750		Not Defined	Service	Closed	MB000212	1:15	12/2/2017 12:00 PM	12/2/2017 4:00 PM	12/2/2017 10:59 AM	12/2/2017 11:4
1-2S07W857		Not Defined	Service	Closed	MB000212	1:15	12/2/2017 8:00 AM	12/2/2017 12:00 PM	12/2/2017 10:10 AM	12/2/2017 10:4

Task List uns JEP



2. This page will pop up asking you to input the time frame you want to check for any jobs available to the tech.

Schedule Idle Resource Options

Schedule Task(s) to HENTKOWSKI:

From: 12/4/2017 8:25 AM

To: 12/4/2017 12:00 PM

Scheduling Considerations

Schedule Idle Resource

Next Cancel

Use to select time frame

3. If there is a job available it will give you the option to select that job and it will show up on the Tech's Gantt

**Schedule Idle Resource Result**

Task(s) scheduled to CARRILLO:

Activity ID	Number	Start	Finish
1-2S2SFPUI	1	12/4/2017 9:24 AM	12/4/2017 10:26 AM
1-2S220B8A	1	12/4/2017 12:00 PM	12/4/2017 1:15 PM
1-2S27EFQ4	1	12/4/2017 1:38 PM	12/4/2017 2:53 PM

Click Schedule to confirm the scheduling results or click Previous to restore the previous state. Click Cancel to exit this action.

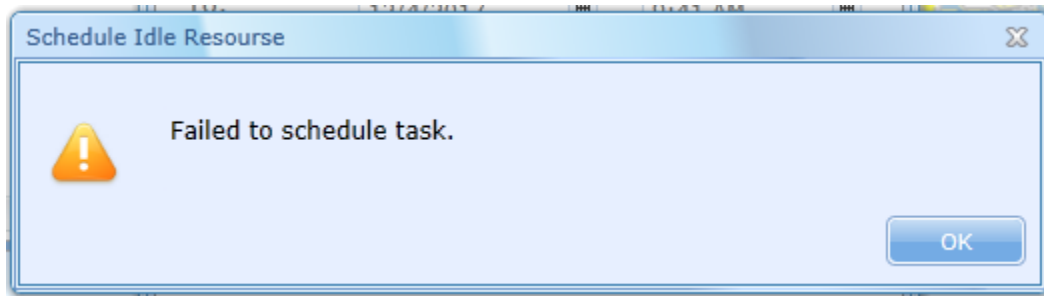
Cancel Schedule Previous

**Select a Job**

**Click Schedule and Job will show up on the Tech Gantt**

**Please double check that the distance for the job that BGO gives you is appropriate. Techs should not be driving out of their radius without supervisor approval.**

4. If no job is available the below notification will pop up.



5. If unable to locate a job using the “Schedule Idle Technician” function, step two is to look into the unscheduled jobs in that area. Right click on the job in unscheduled (Using your unscheduled filter) and select **Show on Map**.

uns > U (6)													
Sche	NRC	Address Change	Activity #	Sub Activity #	MTA Type	Order Sub Type	Status	Tech Team	Work Time	Appointment Star	Appointment Finish	Assignment Start	Assignment Finish
	0		1-2S12J7K4		Not Defined	Service	Unscheduled	Not Defined	1:30	12/4/2017 12:00 PM	12/4/2017 4:00 PM		
	0		1-2S0X3X45		Not Defined	Service	Unscheduled	Not Defined	1:15	12/4/2017 12:00 PM	12/4/2017 4:00 PM		
	0		1-2S2U5X1C		Not Defined	Service	Unscheduled	Not Defined	1:30	12/4/2017 12:00 PM	12/4/2017 4:00 PM		
	0		1-2S2L1RYS		Not Defined	Service	Unscheduled	Not Defined	1:15	12/4/2017 12:00 PM	12/4/2017 4:00 PM		
	0		1-2RWW6SP1		Not Defined	Former Install	Unscheduled	Not Defined	2:10	12/4/2017 8:00 AM	12/4/2017 12:00 PM		
	0		1-2S1PCHF8		Not Defined	Service	Unscheduled	Not Defined	1:30	12/4/2017 8:00 AM	12/4/2017 12:00 PM		

Task List   uns   JEP

Unscheduled Filter

Find an appropriate job based on distance and skill type and place on technician. If you're not sure what's an appropriate distance for that technician verify with Site Supervisor. Click, drag and drop job on the technician and dispatch the job.

6. If there are **no jobs in unscheduled**, then we need to take a look at the scheduled jobs in that region. Click Show All on the Technician Gantt.

The screenshot displays the 'Technician Gantt > UnSaved Filter (1)' window. A red arrow points to the 'Show All' button in the top toolbar. Below the toolbar, a search filter is set to 'Technician > Last Name' with the value 'LITTLEJOHN'. The main area shows a Gantt chart for 'Monday, December 04, 2017' with time slots from 7:00 AM to 3:00 PM. A task for 'DENNIS LITTLEJOHN' is visible, with a green bar labeled 'Upgrade' and a blue bar labeled 'New'. To the right of the Gantt chart is a map showing a residential area with yellow roads and a red location marker. A red box on the left side of the screen contains the text '0 unscheduled' with an arrow pointing to the 'uns' tab in the bottom task list. The task list at the bottom shows 'Task List' with tabs for 'uns' and 'JEP'. The 'uns' tab is active, showing a list of tasks with columns: Sche, NRC, Address Change, Activity #, Sub Activity #, MTA Type, Order Sub Type, Status, Tech Team, Work Time, Appointment Star, Appointment Finish, Assignment Start, and Assignment Finish. The list is currently empty.

Technician Gantt > UnSaved Filter (1) Last refresh: 12/4/2017 7:43:37 AM

Show All Hide Definition Apply Save

Technician > Last Name Equals LITTLEJOHN

Monday, December 04, 2017

First Name	Last Name	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM
DENNIS	LITTLEJOHN						Upgrade		New	

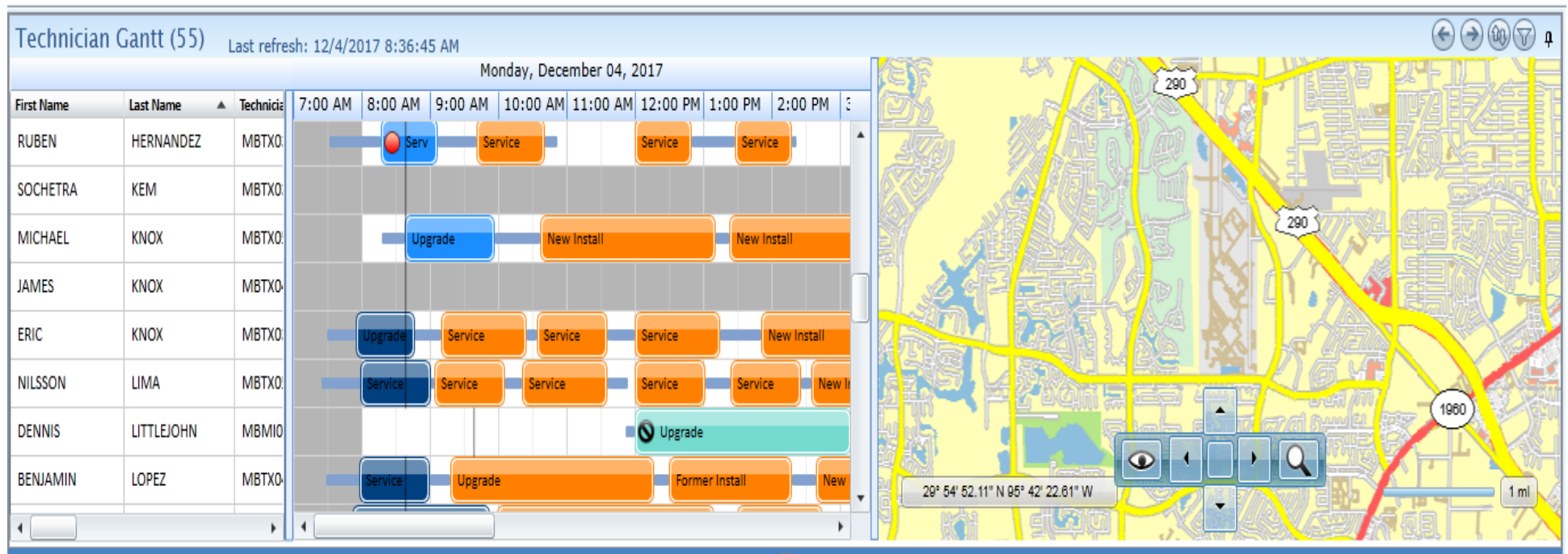
0 unscheduled

uns > U (0)

Sche	NRC	Address Change	Activity #	Sub Activity #	MTA Type	Order Sub Type	Status	Tech Team	Work Time	Appointment Star	Appointment Finish	Assignment Start	Assignment Finish
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Task List uns JEP

- This will show all the Technicians and the jobs they are covering for the day. If a job is scheduled (Orange) it can still be moved around and the technician it is on is not aware that that job is placed on him. This means you can move that schedule job, to your idle tech once it is at an appropriate distance and the tech has the proper skill to complete the job. If you're not sure what's an appropriate distance for that technician verify with Site Supervisor. Click, drag and drop job on the technician and dispatch the job.



8. **Using the Map** - Show the **Technician on the Map** – The map will show any **Unscheduled jobs**, if any that is near to the technician.

ClickSoftware  
Making Service Click

Main View Schedule Monitor Workload Management Help

01 Standard For Optimizer

Previous Next Options

### Technician Gantt (298) Last refresh: 12/5/2017 4:33:37 PM

Navigation

First Name	2:00 PM	1:00 PM	2:00
AZMI		Service	
SAMI			
FRANKELY		Service	
BERTIN		Routing	
ABDULNASSER		Automotive Issues	
FLORIAN			
UKANA			
MAHER			
YAHYA		Service	
BAKR		Service	
ALFREDO		Upgrade	

Additional Panels

### Unsch > Unsch (6)

Sche	NRC	Address Change	Activity #	Sub Activity #	MTA Type	Order Sub Type	Status	Tech Team	Work
	0		1-2S18VS9B		Not Defined	Service	Unscheduled	Not Defined	1:15
	0		1-2S4YYIDI		Not Defined	NC Rollback	Unscheduled	Not Defined	1:00

Task List Unsch Dep



If there is no unscheduled job, check the green icons for any **Scheduled** jobs that can be assigned to the tech.

**Technician Gantt (40)** Last refresh: 12/5/2017 4:22:59 PM

First Name	PM	1:00 PM	2:00 PM
STEVEN			
KAYLOR	vice	Service	
NOLAN			
CHARLES		WildBlue Retail	New Install
JOSHUA			Scheduled Time Off
THADDEUS		Former I	
RICHARD		Service	
WILLIAM		New Install	
CODY			
JAMES			Scheduled Time Off
MICHAEL			
DAVID			

**Activity List > Jep (0)**

Sche	NRC	Address Change	Activity #	Sub Activity #	MTA Type	Order Sub Type	Status	Tech Team	Work Tim

Task List: Unsch Jep

If all of the above is done and we cannot find a job for the tech, go ahead and request an EOD from supervisor.