

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 search bar. The left sidebar contains a 'Navigation' panel with a 'Calendar' section and a 'Business Structure' tree. The main area is divided into three sections: 'Technician Gantt (21)', a map, and 'Additional Panels'.

Navigation Panel:

- Calendar: From: 12/2/2017, To: 12/2/2017
- Business Structure: Load/Unload Immediately
- ALEXANDRIA LA
 - LA05_MULTIBAND
 - LA05_MULTIBAND_EMPATH
 - LA05_MULTIBAND_emPath LLC
 - LA08_MULTIBAND
 - LA08_MULTIBAND_EMPATH
 - LA08_MULTIBAND_emPath LLC
 - ALPENA MI
 - BANGOR ME
 - BATON ROUGE LA
 - BEAUMONT TX
 - BOSTON MA
 - BURLINGTON VT
 - CHAMPAIGN IL
 - CINCINNATI OH
 - CLEVELAND OH
 - DAVENPORT IA
 - DETROIT MI
 - EVANSVILLE IN


Technician Gantt (21): Last refresh: 12/2/2017 11:35:41 AM, Saturday, December 02, 2017. The Gantt chart shows tasks for technicians: KIMBERLY STUDEBAKER, ETHAN RADA, BENJAMIN LIVENGOD, RICHARD BEAL, WILLIAM ARCHER, TODD GULLORY, BEAU, and MICHAEL. Tasks include 'New Install', 'Routing', 'LOA', and 'Upgrade'.

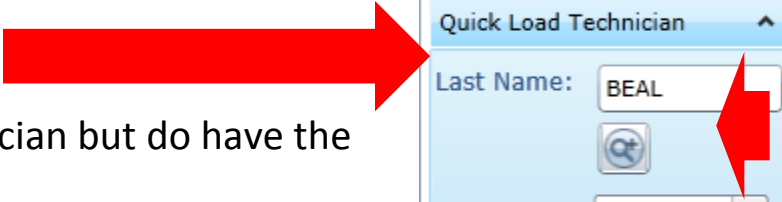
Map: A map showing a street network with yellow and red lines. A large red arrow points from the 'Additional Panels' section to the map.

Additional Panels: A table showing work time and appointments.

Work Time	Appointm
1:15	12/2/201
1:15	12/2/201
1:30	12/2/201
2:15	
2:40	12/2/201
4:55	12/2/201
2:25	12/2/201
2:30	12/2/201
2:20	12/2/201
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

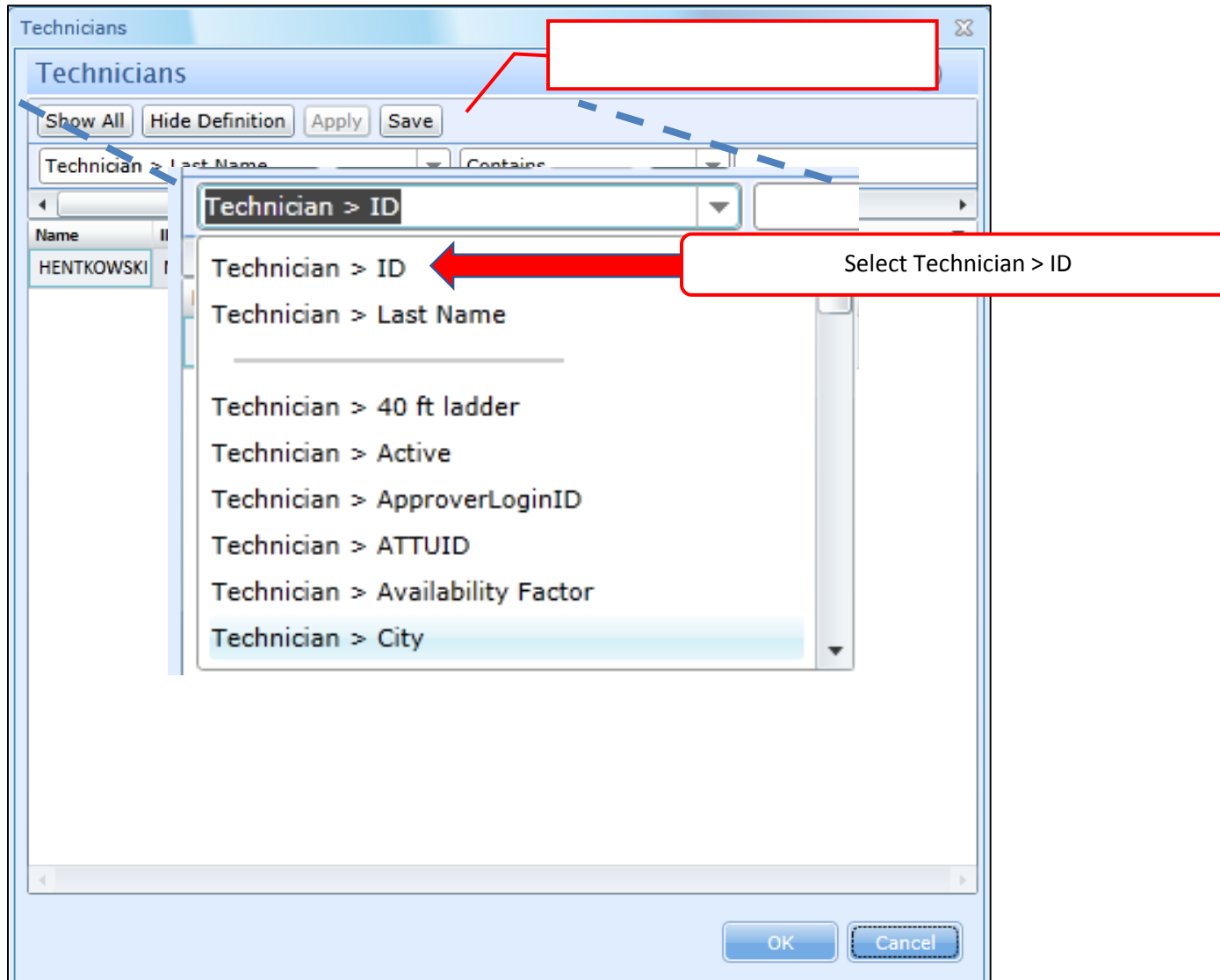
To: 12/2/2017

Load

Reload previous loaded data

Additional Panels

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



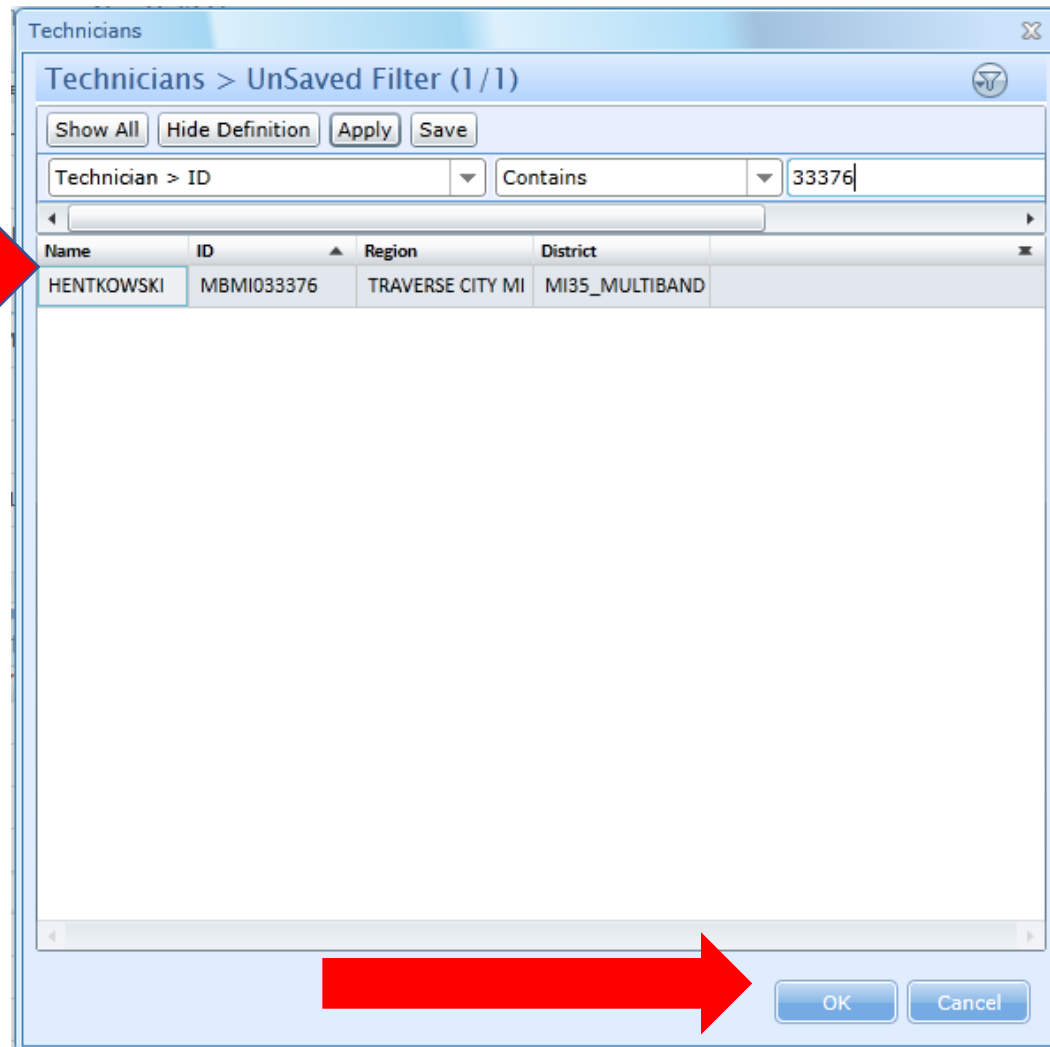
5. Ensure that your criteria tab says **Contains** and Enter the Tech ID given to you and click Apply.

The screenshot shows a software interface with a criteria tab. At the top, there are buttons for 'Show All', 'Hide Definition', 'Apply', and 'Save'. Below these, the criteria is set to 'Technician > ID' with a dropdown menu showing 'Contains' and a text field containing '33376'. A red arrow points from the 'Apply' button to the right. Another red arrow points from the 'Contains' dropdown menu to the right. Below the criteria, there is a table with columns 'Name', 'ID', and 'Region'. The first row shows 'HENTKOWSKI' under 'Name'. At the bottom of the window, there are 'OK' and 'Cancel' buttons.

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

Map showing location: 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

JOSHUA Upgrade New Install End of Day

JAMES Military Leave

Map: 29° 55' 55.84" N 95° 37' 33.70" W 1 ml

Context Menu:

- Edit Technician
- Copy Technician ID
- Copy Technician Phone Number
- Show on Map
- Schedule Idle Technician
- Mode
- Jump To Origin Technician
- Technician Audit
- Export Technician Audit
- Create Multiple N/A

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.

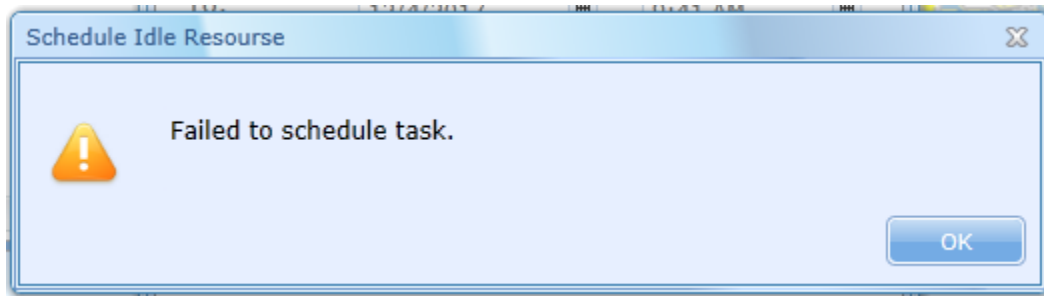
Cancel Schedule Previous

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 street grid with a red line indicating a route. 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 selected, and the task list is 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	

20° 55' 40.31" N 05° 42' 13.05" W

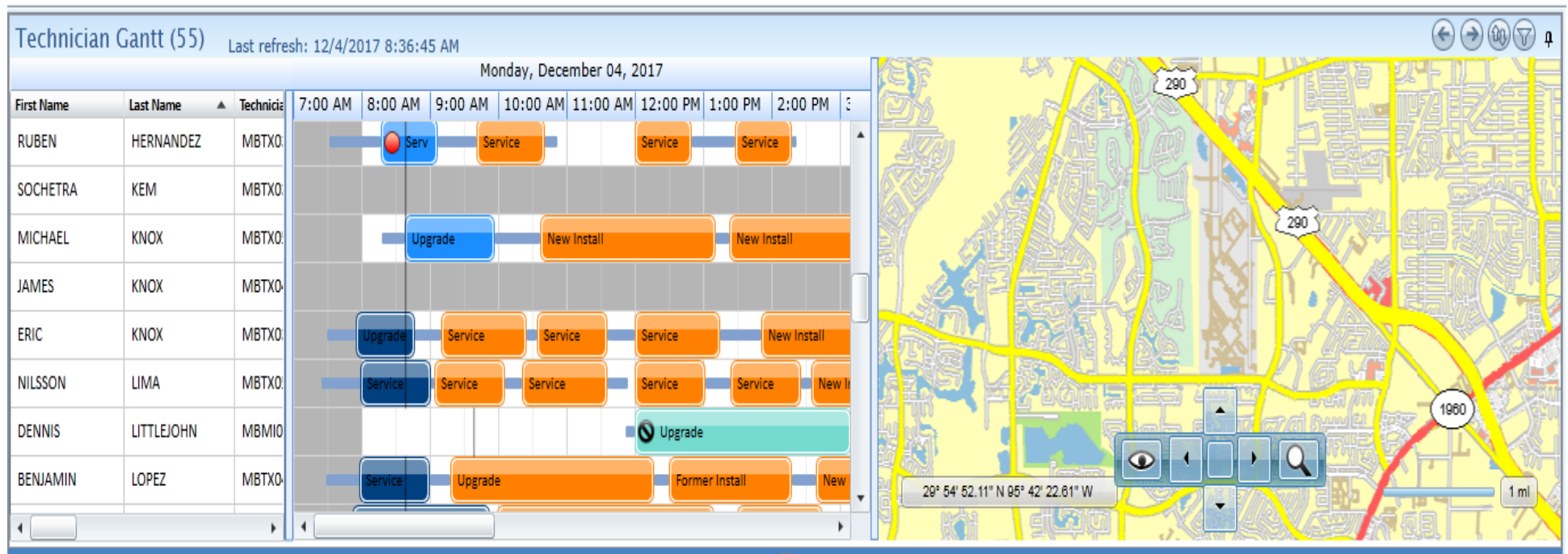
0 unscheduled

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
------	-----	----------------	------------	----------------	----------	----------------	--------	-----------	-----------	------------------	--------------------	------------------	-------------------

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.

The screenshot displays a software interface for technician scheduling and location tracking. The top section, titled "Technician Gantt (40)", shows a list of technicians on the left and a Gantt chart in the center. The Gantt chart has columns for time slots (PM 1:00 PM, 2:00 PM, etc.) and uses colored bars to represent different job types: green for "Service", blue for "New Install", and grey for "Scheduled Time Off". Below the Gantt chart is an "Activity List > Jep (0)" section with a table of activities. The bottom part of the interface features a map of the area around Olive Branch, Mississippi, with various locations marked by green checkmarks and blue pins. The map includes a scale bar (2.5 mi) and a compass. The interface also has a "Navigation" panel on the left and an "Additional Panels" panel on the right.

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.