## FSMv5: Schedule, assign, & unassign a Task

## Summary

Audience: Dispatchers, Admin Support

This Job Aid is for all FSM dispatch users and individuals who schedule installations and service calls using the FSM website to manage orders and tasks.

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Schedule a Task

Open the **Unscheduled** Task and verify the **Date from** date and time range.

| FSM / Brow                | se tasks / Task det                                          | ails (T/18587/2024)                                                                                       |                                                                                                        |                                                                                                                                             |                | ٩                | •        | ) 🕕 |
|---------------------------|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|----------------|------------------|----------|-----|
|                           | ask status Unsche                                            | Change status                                                                                             |                                                                                                        |                                                                                                                                             | ¢              | Go to work order | Calendar | ł   |
| Basi                      | ic data                                                      |                                                                                                           | Assignment details                                                                                     |                                                                                                                                             |                |                  |          |     |
| Tec<br>Wor<br>Tas<br>Pric | rk order id<br>:hnology<br>rk order type<br>ik type<br>ority | T/18587/2024<br>WO/18389/2024<br>Internet<br>Customer Work Order<br>Install<br>Low<br>Boston 02113, 300 💿 | Organization unit<br>Appointment slot<br>Count of schedule<br>changes<br>Count of time slot<br>changes | 0<br>0                                                                                                                                      |                |                  |          |     |
|                           | ation<br>stomer number                                       | Hanover Street reinid_795f8f27-e3a9-4ab5-9149-                                                            | Assign the task<br>Contractors                                                                         | (Select)                                                                                                                                    |                |                  |          |     |
|                           | supported vice regions                                       | e0714806ad7f<br>MA07                                                                                      | Date from                                                                                              | 10/16/24, 01:15 PM                                                                                                                          | to <u>10</u> / | 22/24, 11:40 PM  |          | ך   |
| Ear                       | fiest realization<br>e                                       | 🖉 None                                                                                                    |                                                                                                        |                                                                                                                                             | _              |                  |          |     |
| SLA                       | A.                                                           | 10/22/24, (154:35)<br>11:40<br>PM                                                                         | Notes                                                                                                  |                                                                                                                                             |                |                  |          |     |
| BEF                       | P External ID                                                | 31511336-19ba-551b-ac6c-c25430b1135e                                                                      |                                                                                                        | + Add note                                                                                                                                  |                |                  |          |     |
| Sta                       | tus reason                                                   | No value.                                                                                                 |                                                                                                        |                                                                                                                                             |                |                  |          |     |
| Dea                       | aler ID                                                      | 200015759                                                                                                 |                                                                                                        | d reactor api (service-account-fsm-api-qa), 10/15/24, 11:41 PM                                                                              |                |                  |          |     |
| Self                      | f Installing                                                 | 🔵 Yes 🔘 No                                                                                                | Updated FSI with serv                                                                                  |                                                                                                                                             |                |                  |          |     |
| Sal                       | es channel                                                   | US_RESIDENTIAL_FFL                                                                                        |                                                                                                        | d reactor api (service-account-fsm-api-qa), 10/15/24, 11:40 PM<br>mages: https://apis.vega-dev.viasat.io/tech-tools-api/audit/1c3c9dbe-c68e | 38cf-b586      | -a8fb6ea4d132    |          |     |

Select **Get slots** button.

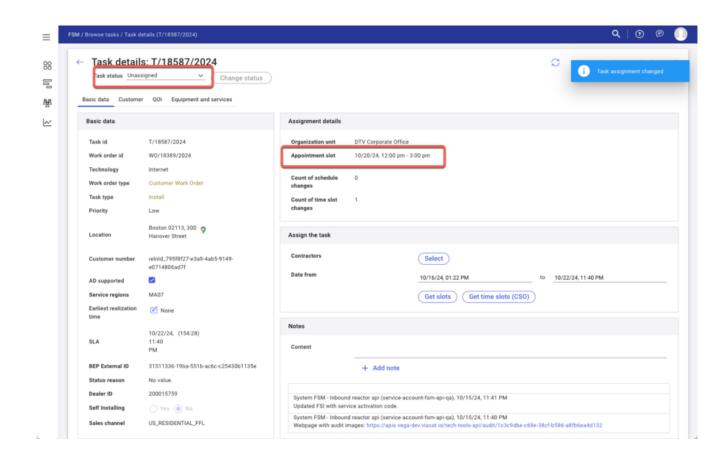
The Choose timeslot window opens.

| noose timeslot             |                         |                          |                    |         |  |
|----------------------------|-------------------------|--------------------------|--------------------|---------|--|
| ssignment details          |                         |                          |                    |         |  |
| Organization unit          |                         |                          |                    |         |  |
| Appointment slot           |                         |                          |                    |         |  |
| count of schedule changes  | 0                       |                          |                    |         |  |
| count of time slot changes | 0                       |                          |                    |         |  |
|                            | Appointment slot date 🗢 | Appointment slot time  ≑ | Available variants | Details |  |
| Change appointment         | 10/18/24                | Morning                  | 1                  | $\odot$ |  |
| Change appointment         | 10/18/24                | Mid-Day                  | 1                  | $\odot$ |  |
| Change appointment         | 10/18/24                | Afternoon                | 1                  | $\odot$ |  |
| Change appointment         | 10/18/24                | Evening                  | 1                  | $\odot$ |  |
| Change appointment         | 10/19/24                | Morning                  | 1                  | $\odot$ |  |
| Change appointment         | 10/19/24                | Mid-Day                  | 1                  | $\odot$ |  |
| Change appointment         | 10/19/24                | Afternoon                | 1                  | $\odot$ |  |
| Change appointment         | 10/19/24                | Evening                  | 1                  | $\odot$ |  |
| Change appointment         | 10/20/24                | Morning                  | 1                  | $\odot$ |  |
|                            |                         | (1 of 3)  < < 1 2        | 3 > >              |         |  |
| Data analysis              |                         |                          |                    |         |  |

Select the Change appointment button to select the open date and time slot for the appointment.

You can see additional open timeslots by selecting the numbers or arrows at the bottom of the window.

The Task is now in the **Unassigned**, **Task status**. Verify the Appointment slot.



Now we can assign the Task to a Technician.

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## Assign Tasks

To assign a task, click on the **Calendar** button in the top left corner.

| ≡         | FSM / Browse tasks / Task de                                                       | tails (T/18587/2024)                                                               |                                                                                                        |                                                           | ۹ (                | ()<br>() |   |
|-----------|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|--------------------|----------|---|
| 88 []] 88 | Cask status Unass                                                                  | Change status                                                                      |                                                                                                        | 4                                                         | C Go to work order | Calendar | I |
| $\sim$    | Basic data                                                                         |                                                                                    | Assignment details                                                                                     |                                                           |                    |          |   |
|           | Task id<br>Work order id<br>Technology<br>Work order type<br>Task type<br>Priority | T/18587/2024<br>W0/18389/2024<br>Internet<br>Customer Work Order<br>Install<br>Low | Organization unit<br>Appointment slot<br>Count of schedule<br>changes<br>Count of time slot<br>changes | DTV Corporate Office<br>10/20/24, 12:00 pm - 3:00 pm<br>0 |                    |          |   |
|           | Location                                                                           | Boston 02113, 300 ♀<br>Hanover Street                                              | Assign the task                                                                                        |                                                           |                    |          |   |
|           | Customer number<br>AD supported<br>Service regions                                 | reinid_795f8f27-e3a9-4ab5-9149-<br>e07148066ad7f<br>2<br>MA07                      | Contractors<br>Date from                                                                               |                                                           | 10/22/24, 11:40 PM |          |   |
|           | Earliest realization                                                               | 🖉 None                                                                             |                                                                                                        | Get slots Get time slots (CSO)                            |                    |          |   |

The Calendar window opens. The **Appointment slot** is displayed in yellow in the Task id row.

Note: You can return to the Task details page by clicking the Task id.

|                | Employees Tasks<br>Week Month |                            | Skills        |                 |                  | < October 20, 202      |                          |               |              |                |           |              | 8       | ۍ ۱<br>+ | _     |
|----------------|-------------------------------|----------------------------|---------------|-----------------|------------------|------------------------|--------------------------|---------------|--------------|----------------|-----------|--------------|---------|----------|-------|
| E Day          | week Month                    |                            |               |                 |                  |                        |                          |               |              |                |           |              |         | Ŧ        | -     |
|                |                               | 12:00 AM 1:00 AM 2:00 AM 3 | 00 AM 4:00 AM | 5:00 AM 6:00 AM | 7.00 AM 00 AM 91 | SU AM 10:00 AM 11 9 AM | n 10/20<br>12:00 PM 1:00 | PM 2:00 PM 3: | 0 PM 4:00 PM | 5:00 PM 6:00 P | M 7:00 PM | 1:00 PM 9:00 | PM 10:0 | 0 PM 11  | 00 Pt |
| i T/18587/2024 |                               |                            |               |                 |                  |                        |                          |               |              |                |           |              |         |          |       |
| Search         | <b>알</b> 2                    |                            |               |                 |                  |                        |                          |               |              |                |           |              |         |          |       |
| Tech Test      |                               |                            |               |                 |                  |                        |                          |               |              |                |           |              |         |          |       |
| Paris Silviu   |                               |                            |               |                 |                  |                        |                          |               |              |                |           |              |         |          |       |

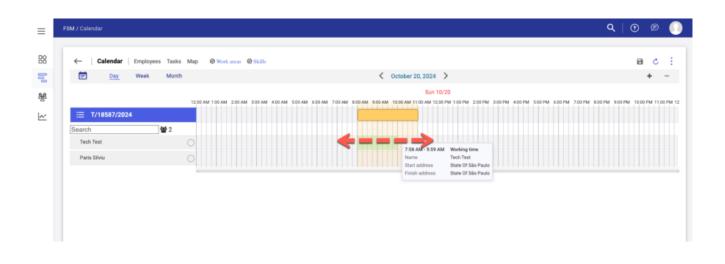
The Technician must have a working time setup to assign the

| Task |  |
|------|--|
|------|--|

| ←   Calendar   Employ | ees Tasks Map 🛛 Work areas 🖓 Skills     |                                                                                     | 8 0                                                |
|-----------------------|-----------------------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------|
| 🗐 <u>Day</u> Week     | Month                                   | < October 20, 2024 >                                                                | +                                                  |
|                       |                                         | Sun 10/20                                                                           |                                                    |
| i T/18587/2024        | 12:00 AM 1:00 AM 2:00 AM 3:00 AM 4:00 A | M 505 AM 650 AM 700 AM 800 AM 900 AM 1000 AM 1200 FM 150 FM 200 FM 200 FM 400 FM 50 | 0 PM 6:00 PM 7:00 PM 8:00 PM 9:00 PM 10:00 PM 11:0 |
| Search                | 볼 2                                     |                                                                                     |                                                    |
| Tech Test             |                                         | Add availability                                                                    |                                                    |
| Paris Silviu          |                                         | Add evailability Vorking time Add inaccessibility Overtime                          |                                                    |
|                       |                                         | Template >                                                                          |                                                    |
|                       |                                         | Show                                                                                |                                                    |
|                       |                                         | E Set the same day                                                                  |                                                    |
|                       |                                         |                                                                                     |                                                    |
|                       |                                         |                                                                                     |                                                    |
|                       |                                         |                                                                                     |                                                    |

Right-click on the Technician row of the calendar. Hover over Add Availability and select Working time.

A green bar will be inserted. This represents the technician's available working time.



Drag the green bar in either direction to extend available work times. The green bar must be within the same time limit or greater than the appointment slot to assign the work order.

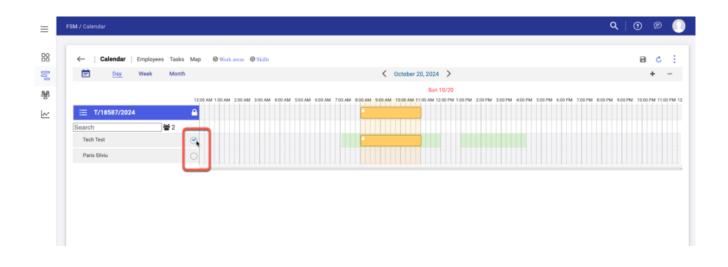
When the work order time frame and technician's available working time (green bar) are inserted, we can now assign the technician to the work order.

|                     | endar   Emp | loyees Task | Мар      | Ø Work    | areas 6 | Skills  |         |        |        |      |        |         |         |       |         |         |         |       |         |      |       |           |       |         |        |        |         |       | 8        | c     |
|---------------------|-------------|-------------|----------|-----------|---------|---------|---------|--------|--------|------|--------|---------|---------|-------|---------|---------|---------|-------|---------|------|-------|-----------|-------|---------|--------|--------|---------|-------|----------|-------|
| Ē                   | Day We      | ek Mont     | n        |           |         |         |         |        |        |      |        |         | <       | Octob | ber 20, | 2024    | >       |       |         |      |       |           |       |         |        |        |         |       | +        |       |
|                     |             |             |          |           |         |         |         |        |        |      |        |         |         |       |         | Sun 1   |         |       |         |      |       |           |       |         |        |        |         |       |          |       |
| ⊞ T/185             | 587/2024    |             | 12:00 AM | 4 1:00 AM | 2.00 AM | 3:00 AM | a du AM | 5:00 A | M 6:00 | AM 7 | 300 AM | E GO AM | 9:00 AM | 10:00 | AM 11:0 | 0 AM 12 | 00 PM 1 | OD PM | 2.00 P1 | 3:00 | W 4:0 | i Pandi S | 00 PM | 6:00 PM | 7.00 P | M 8:00 | 9 MPN 9 | 00 PM | 10:00 PM | 11:00 |
| Search<br>Tech Test |             | 촣 2         |          |           |         |         |         |        |        |      |        |         |         |       |         |         |         |       |         |      |       |           |       |         |        |        |         |       |          |       |
| Paris Silviu        |             |             | 0        |           |         |         |         |        |        |      |        |         |         |       | П       |         |         |       |         |      |       |           |       |         |        |        |         |       |          |       |

Click the checkbox, to the right of the Technician's name to assign the Technician.

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Unassign Tasks



To unassign a Technician from the Task, you simply uncheck the box next to the technician.

This will completely remove the technician from the order.

Once you unselect the box it will unassign the technician from the Task and then autosave the Task.

The Task can be assigned to a different technician.

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