

Scheduling Work Orders in FSM

This Job Aid Covers:

Scheduling Work orders

Access the work order you would like to schedule by clicking on the **FSM ID link** in the search results below:

The screenshot displays the ComArch Field Service Management (FSM) search interface. The top section contains various search filters, including:

- Is urgent: all
- Audit start date: []
- Audit Status: none, New, In progress, Completed
- Audit Result: all
- Customer Email: []
- Services Ordered: BUSINESS_VOIP, EASYCARE, HOTSPOT_SERVICE, INTERNET_ACCESS_SERVICE
- Service region: []
- Equipment model: []
- ATA ship: all
- Product ID: []
- Created date: []
- Scheduled date: []
- Cancelled date: []
- Completed date: []
- Slot: all

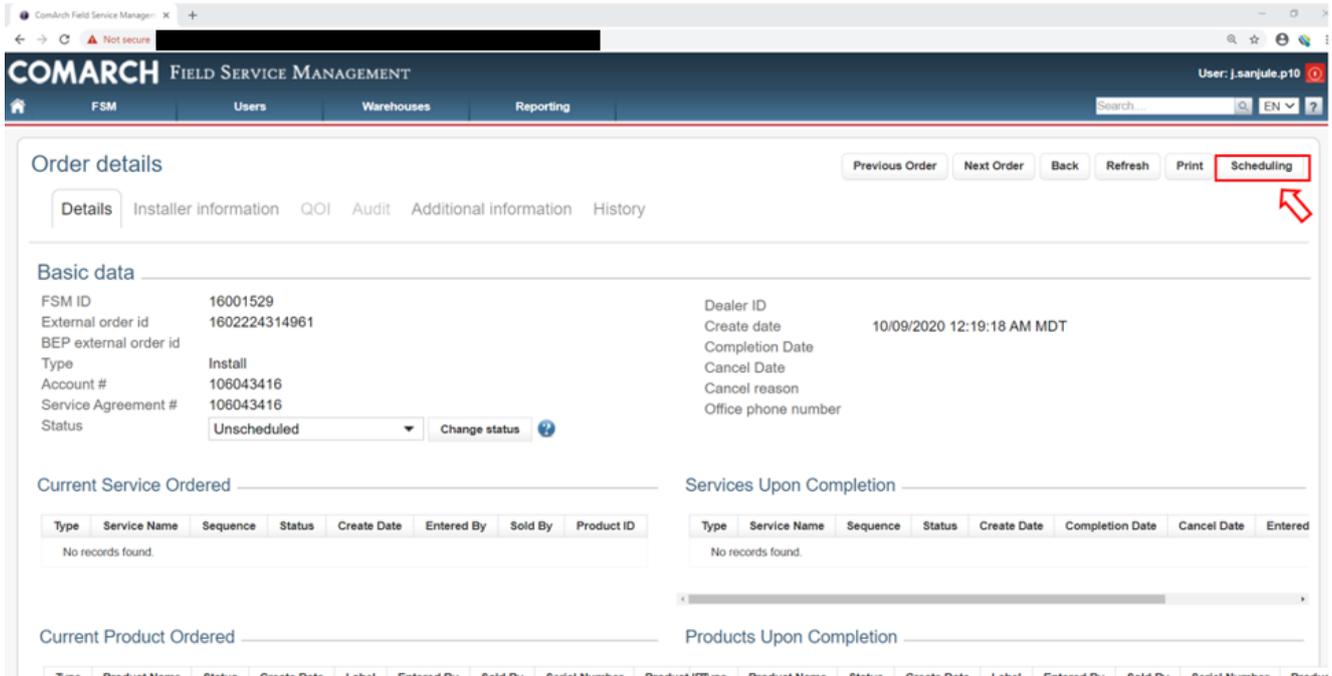
A Search button is located at the bottom right of the filter section.

The search results table is displayed below, with the following columns:

FSM ID	External order ID	Service Plan	Order Status	Order Type	Order state	Created date	Open escalations	Fulfillment partner	Office	Service region	Customer	Schedule day	Completed	Technician	Audit Status
16001526	1602224314961		Unscheduled	Install	Colorado	10/09/2020 12:19:18 AM MDT	No			CO29					

The FSM ID '16001526' is highlighted with a red box, and a red arrow points to it. The page footer shows 'COMARCH' and 'Version:4.6-WB-SNAPSHOT (12/21/2020 12:44)'.

Click **Scheduling**:



The scheduling grid shows available technicians on the left panel and times slots in the middle panel:

Dark Green Bars  = technician is available for regular work time

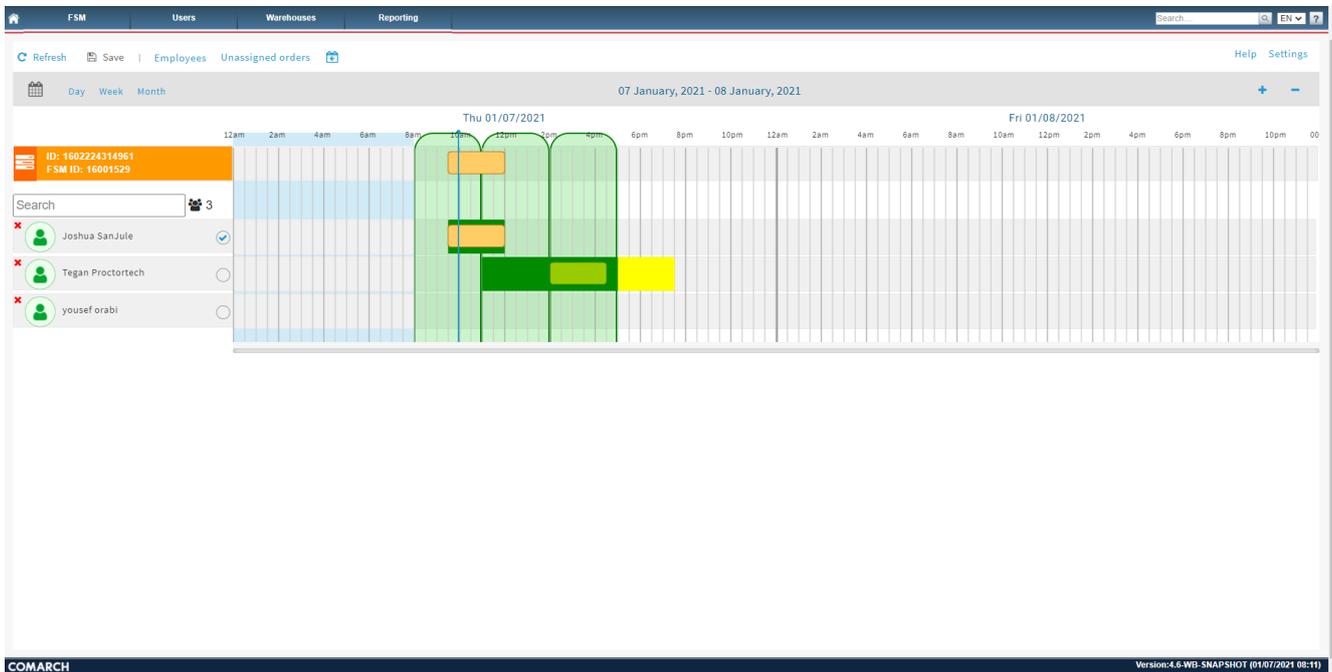
Yellow Bars  = technician is available for overtime

Light Green Bars  = work order time frame inserted

Light Orange Bars  = the order currently being viewed is assigned

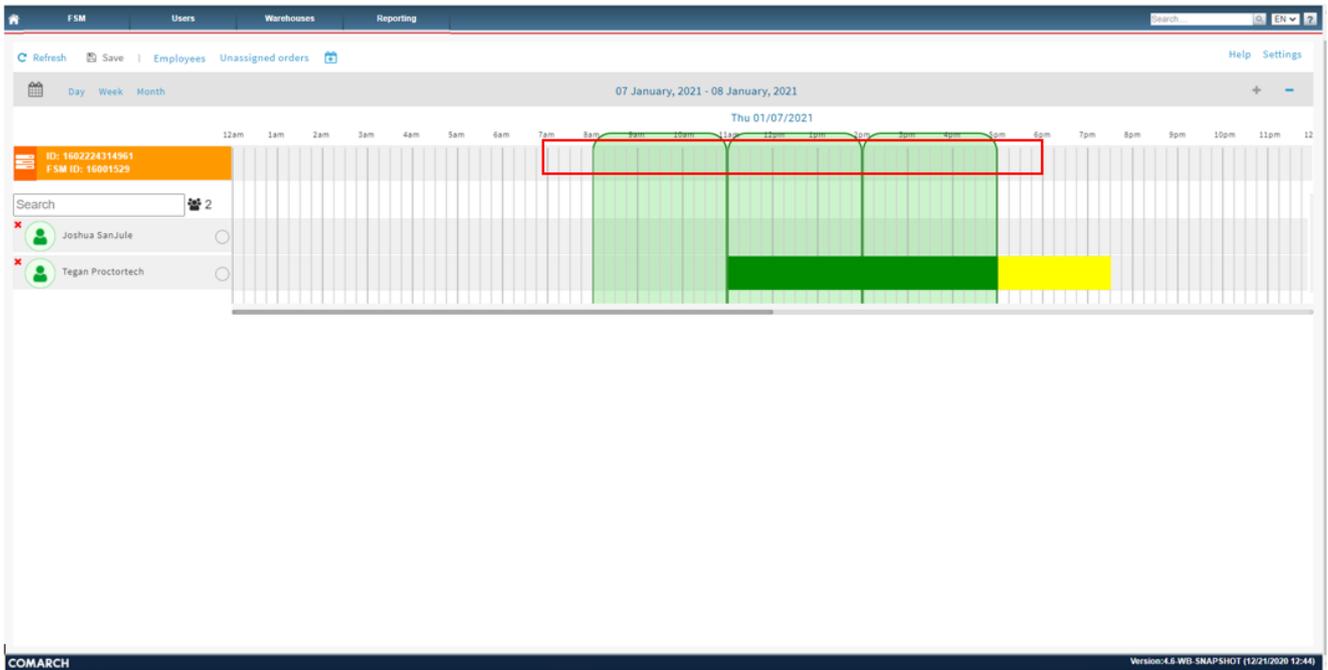
Light Green bar inside Dark Green Bar  = technician assigned to another work order

No Dark Green Bars = technician is not available for that date and time

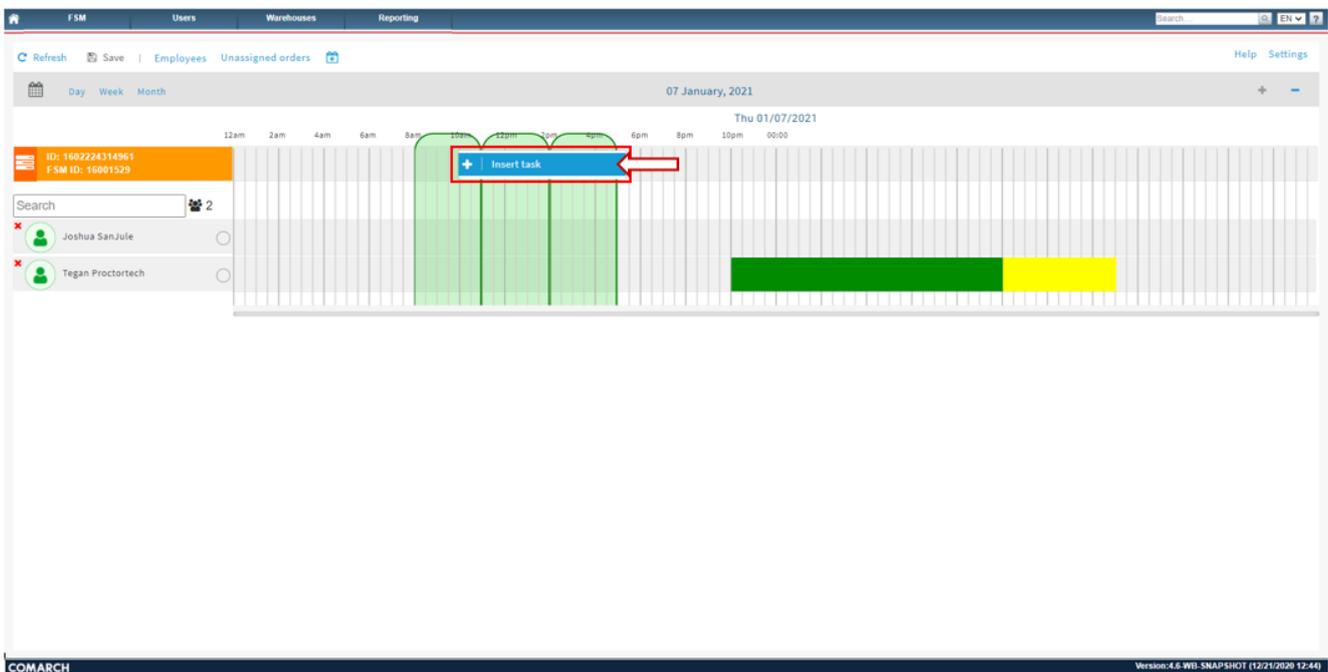


Set work order time

To set the work order time, right click in the same row as the FSM ID. Right click under the date & time that you want the work order to start:



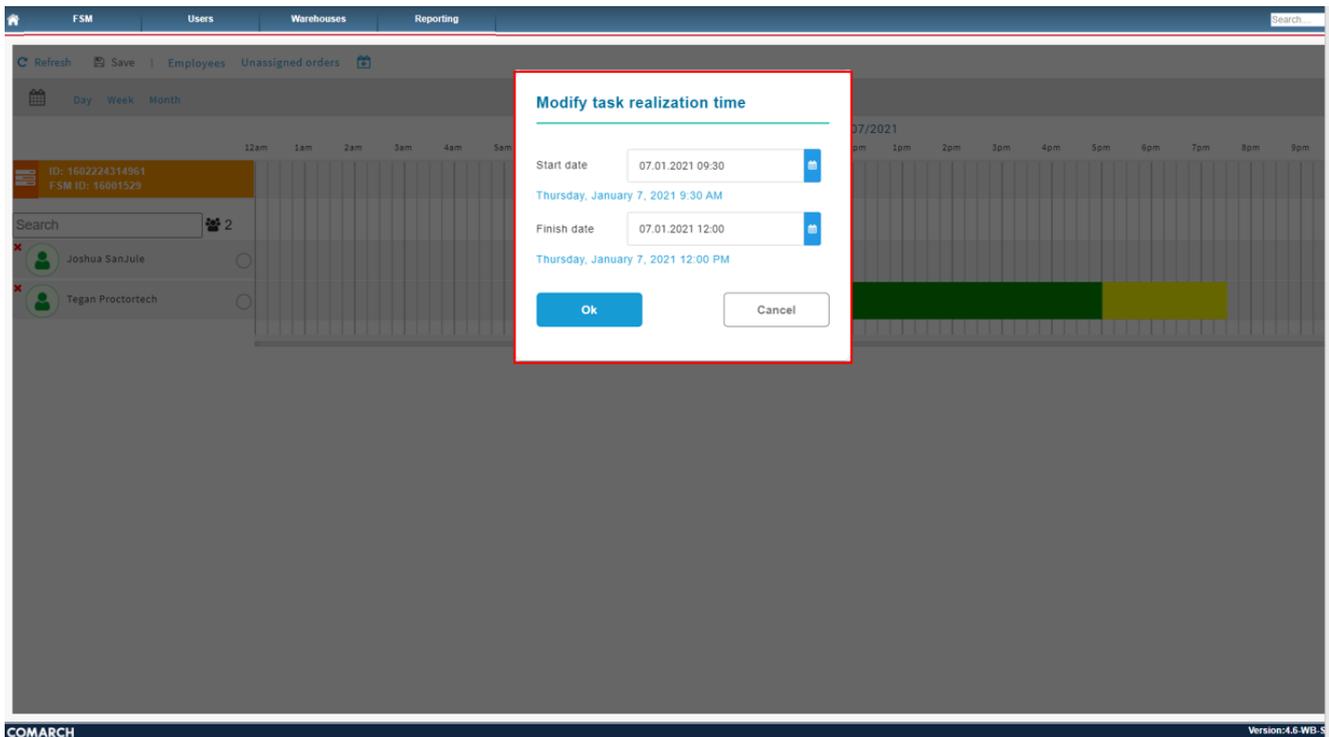
Select **Insert Task**:



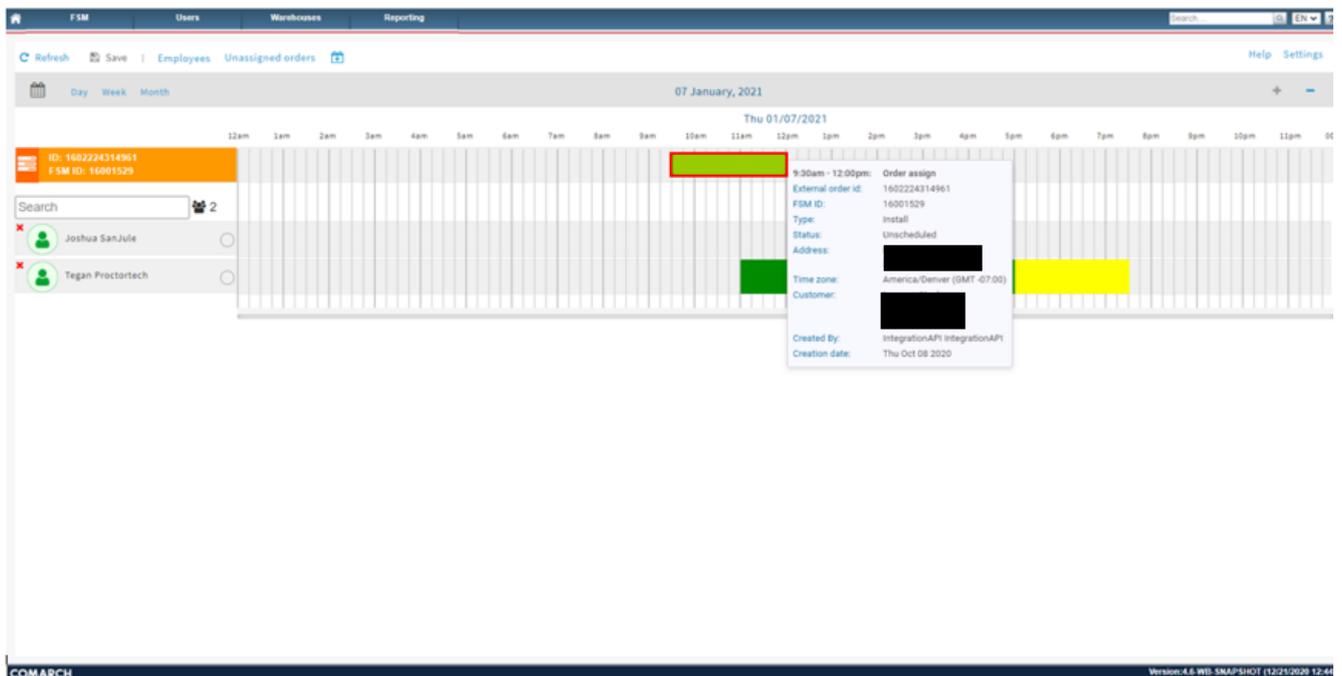
The **Modify Task Realization Time** pop up will appear

This pop up will allow the user to set the start date/time and finish date/time for the work order

Set the start date/time and finish date/time and click **Ok**:

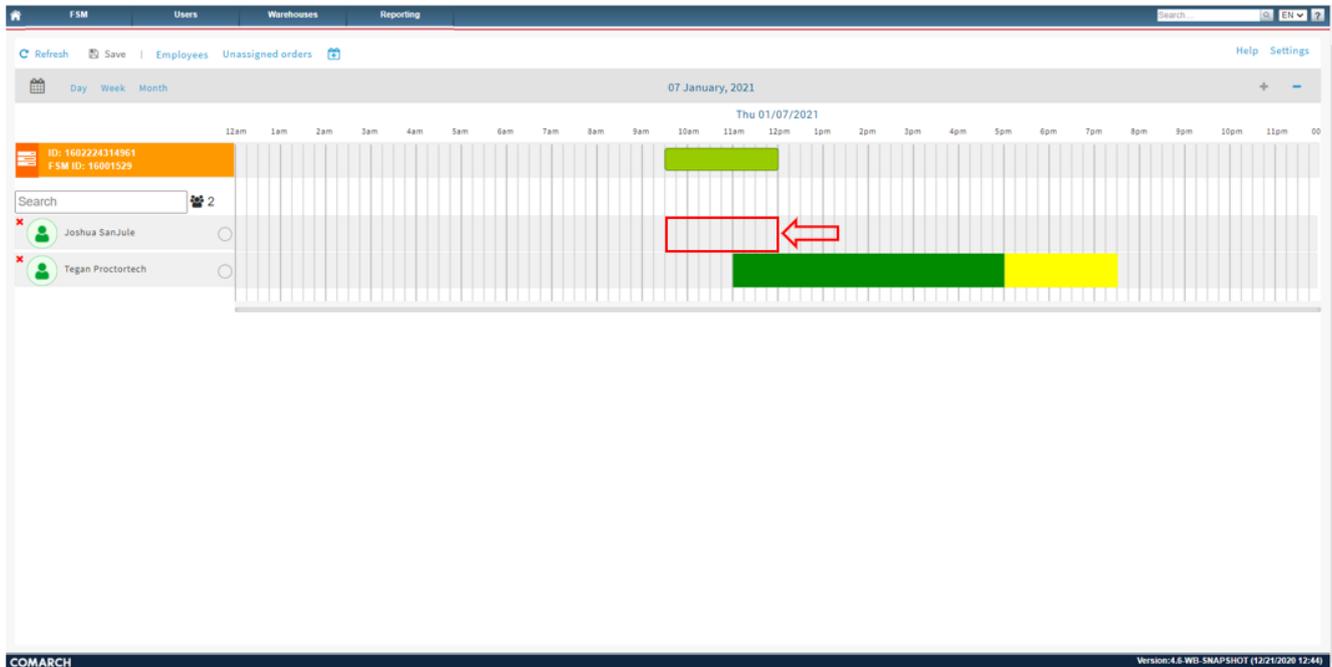


A Light Green Bar will now be inserted. The Light Green Bar represents the work order time frame:



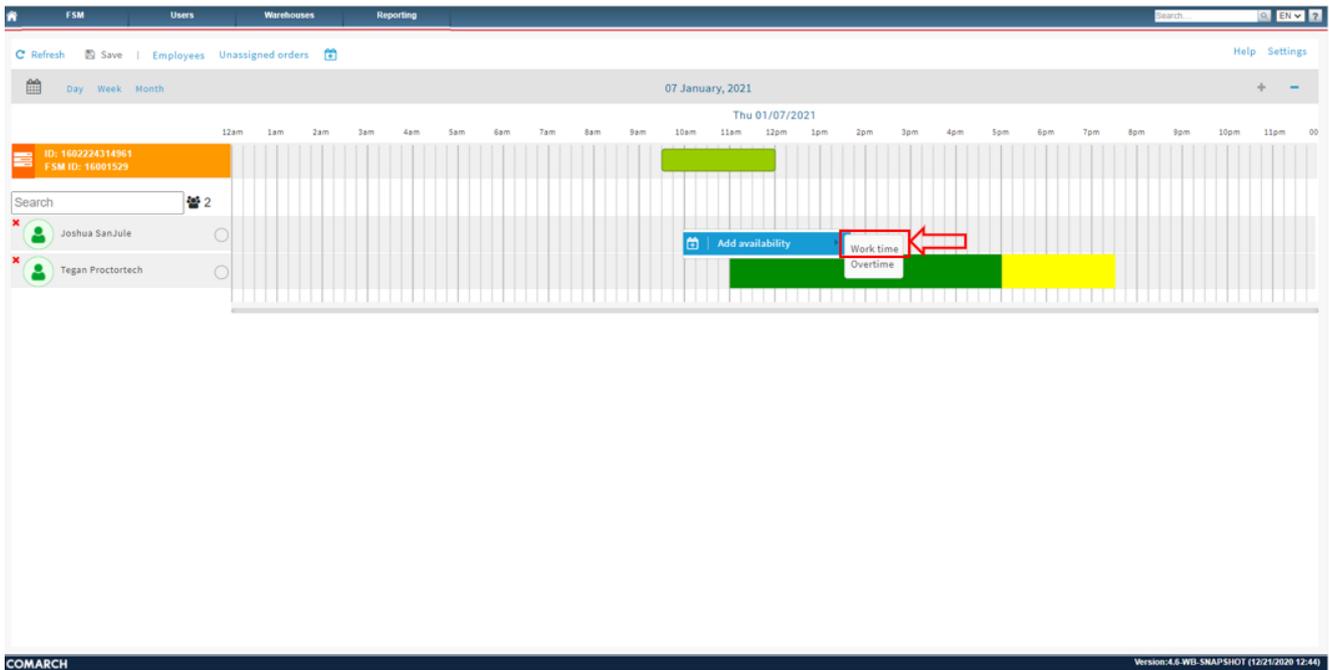
Add available work time to a technician

Right click in the same row as the technician's name under the desired date & time:

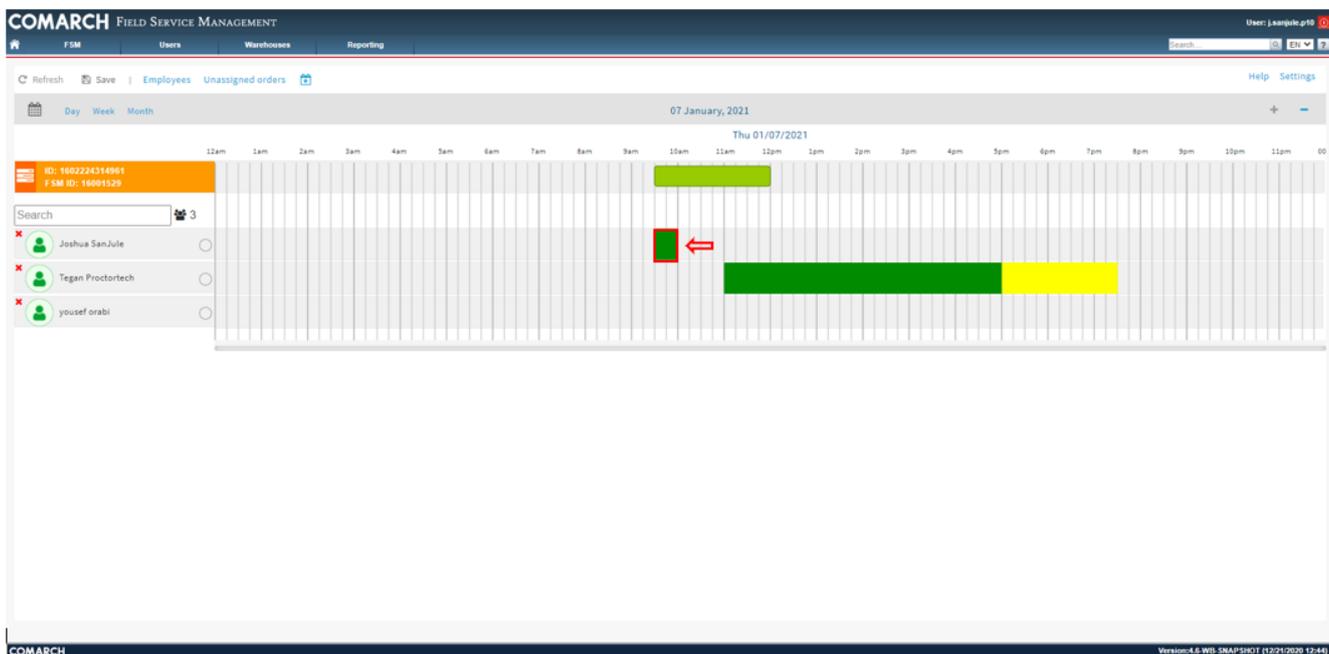


Hover over **Add availability**

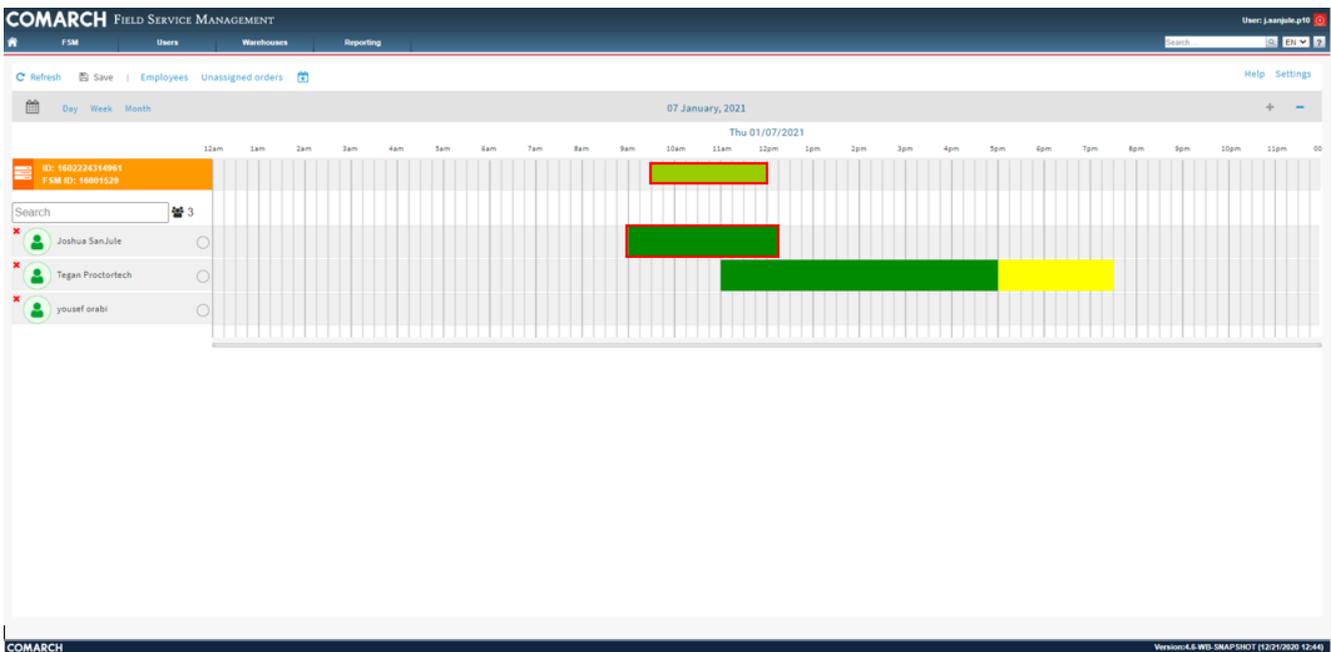
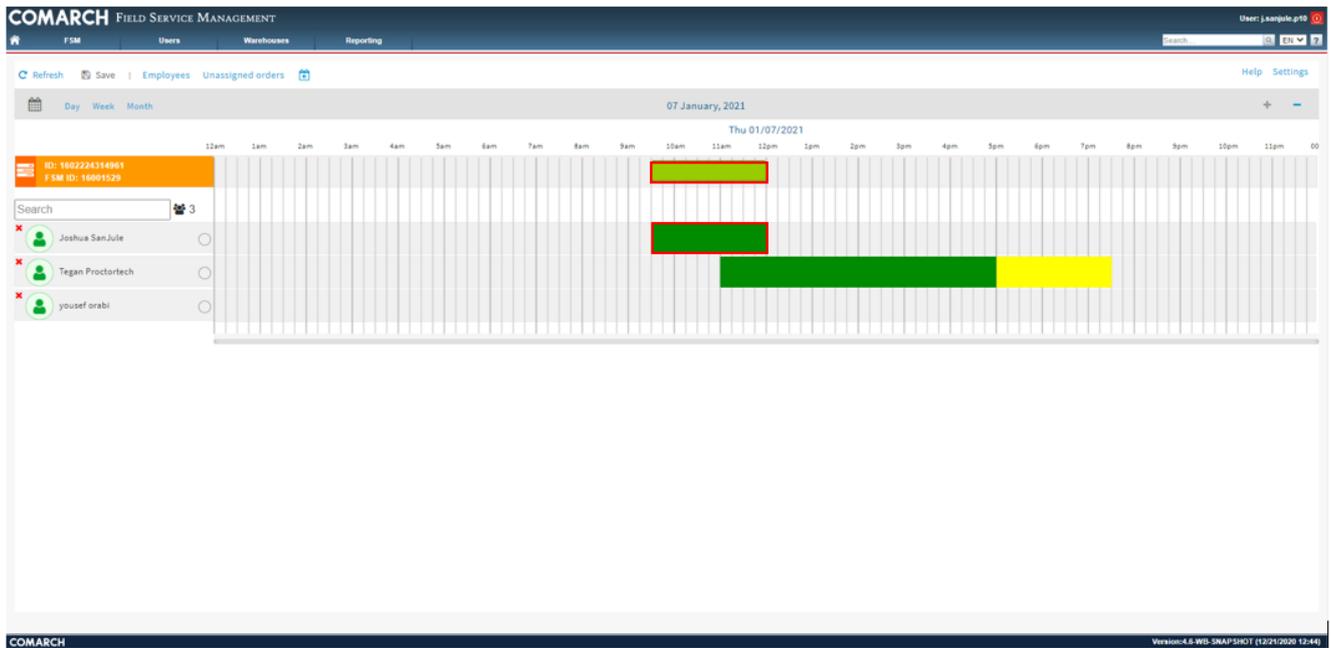
Select **Work time**:



A Dark Green Bar will be inserted. This represents the technicians available work time:



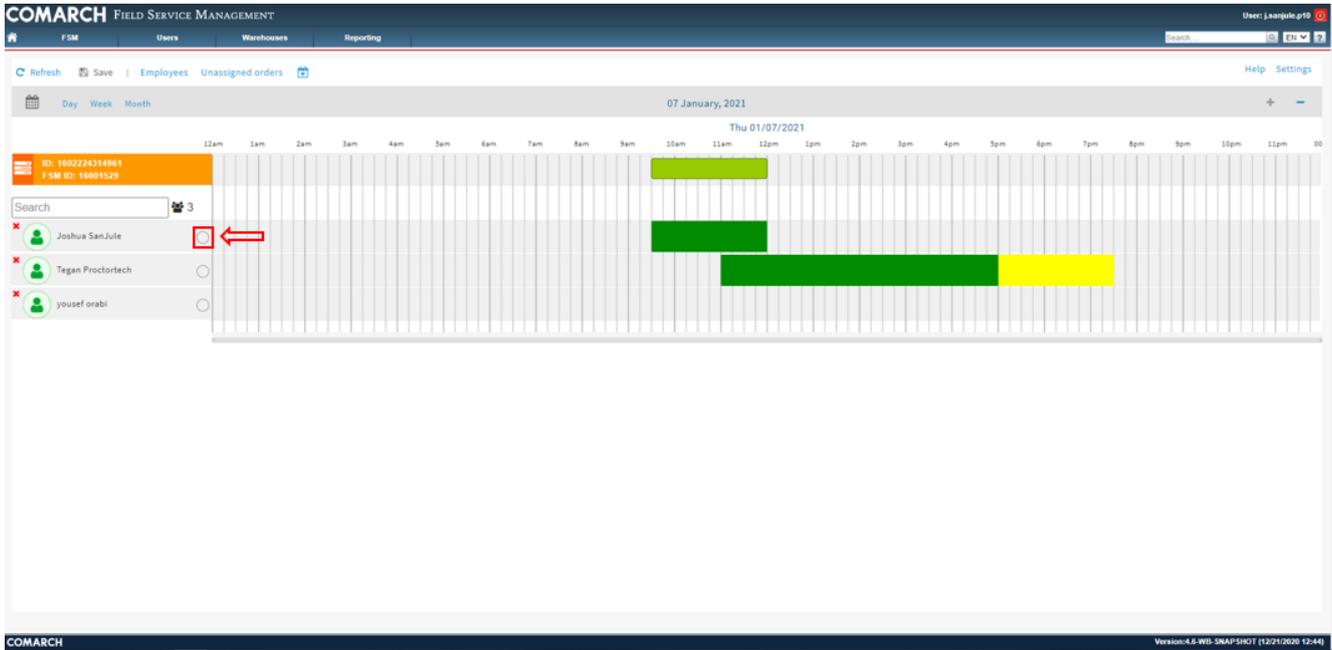
Drag the Dark Green Bar in either direction to extend available work times. To assign the workorder the Dark Green Bar must be within the same time limits or greater than the Light Green Bar:



When the work order time frame (Light Green Bar) and technicians available work time (Dark Green Bar) are inserted, we can now assign the technician

Click the checkbox next to the technician's name.

To assign a technician, click the **checkbox** next to their name:



Once the technician's name is checked, the work order is assigned. The work order will auto save:

