

# Workshop Scheduler

## Product Manual



# Table of Contents

|    |   |    |
|----|---|----|
| 1. | PRODUCT OVERVIEW .....                          | 3  |
| 2. | LICENSING AND SYSTEM ADMINISTRATOR SET UP ..... | 3  |
|    | 2.1 OBTAINING AND ACTIVATING A LICENSE .....    | 3  |
|    | 2.2 ENABLING PORTAL ACCESS .....                | 3  |
| 3. | GETTING STARTED .....                           | 4  |
|    | 3.1 ACCESSING THE WEB PORTAL .....              | 4  |
|    | 3.2 SETTING UP PRIORITY COLOURS .....           | 5  |
|    | 3.3 SETTING UP SCHEDULING HOURS .....           | 6  |
|    | 3.4 CHANGING DEPOT .....                        | 6  |
| 4. | USING THE MULTIPLE VIEWS .....                  | 7  |
|    | 4.1 AGENDA VIEW .....                           | 7  |
|    | 4.2 DAY VIEW .....                              | 7  |
|    | 4.3 WORK WEEK AND WEEK VIEW .....               | 8  |
|    | 4.4 MONTH VIEW .....                            | 8  |
|    | 4.5 SCHEDULED AND ACTIVITY VIEW .....           | 8  |
| 5. | UNDERSTANDING SCHEDULED JOBS .....              | 9  |
|    | 5.1 PARTS STATUS INDICATORS .....               | 9  |
|    | 5.2 JOB TOOL TIP AND JOB QUICK VIEW .....       | 10 |
|    | 5.3 JOB STATUS INDICATORS .....                 | 11 |
| 6. | NAVIGATING THROUGH WORKSHOP SCHEDULER .....     | 11 |
|    | 6.1 ADVANCED FILTERS .....                      | 12 |
|    | 6.2 PERFORMING A SEARCH .....                   | 13 |
|    | 6.3 ENGINEER DETAILS .....                      | 15 |
| 7. | USEFUL INFORMATION .....                        | 15 |

## 1. PRODUCT OVERVIEW

Workshop Scheduler is a tool that gives you full visibility to manage your workshop engineer's workload. With detailed information and full interaction with Gold Service, it provides you with better control over workshop processes.

Your team will gain greater insight as an engineers' work is scheduled, carried out and completed, delivering an all-encompassing, more cost-efficient service.

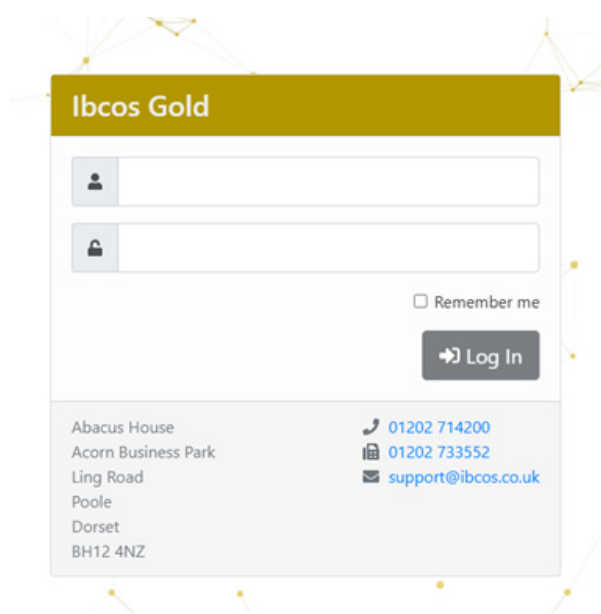
To use Workshop Scheduler, you must be running minimum **Gold version 7.31**.

## 2. LICENSING AND SYSTEM ADMINISTRATOR SET UP

This section is for System Administrators to learn how to license and set up Workshop Scheduler.

### 2.1 Obtaining and Activating a Licence

1. Contact your Account Manager to have a contract issued.
2. Ensure you can access the Portal, where currently Gold Service and Marketplace are accessed. If you do not have either of these products, contact your Account Manager to arrange set up of a Portal.
3. Your system administrator will receive a licence by email which they need to input in Gold.



### 2.2 Enabling Portal Access

To use Workshop Scheduler as a Gold user, you need to enable Portal access for each of your users in Gold (you may have already done this for a previous module).

Follow the steps below to enable Portal Access in Gold:

**System Management > Security > Personnel Security File**

Once you are in the Personnel Security File tab:

1. **Input your password** or press enter to see a list of all users.
2. Navigate to the **Email** tab.
3. **Enter your email** into the field labelled: **Email address**. This will be your portal access username.
4. Navigate to the **Security** tab.
5. Set the **Application user** field to **Yes**.
6. **Enter and confirm new password** – this will be your password for **portal access only**, it will **not change your Gold password**.

## 3. GETTING STARTED

### 3.1 Accessing the Web Portal

To access the Web Portal:

1. **Open a Web Browser** and enter the **specific URL** provided by Ibcos.  
This URL is unique to each dealership. If you use the current Gold Portal, the following will be the URL that you need: **<https://companyname.ibcos.gold>**
2. The URL will prompt you to **enter a Username and Password**. Enter your credentials and **select Log In**.



#### Note:

This will be different to the username and password used to access Gold. It will have been provided by a system administrator.



#### Workshop

- Jobs
- Jobs (New View)
- Job Search
- Job Requests
- Time Approval
- Engineers
- Checklists
- Scheduler

3. **Click Scheduler** on the **Navigation Bar**.



### Did you know?

As soon as you access the Portal, press 'CTRL + F5' to clear the cache. If you do not do this step, you will not see the Workshop Scheduler option in the menu.

## 3.2 Setting Up Priority Colours

Colours can be set on jobs to show their priority. These colours will not be pulled through from the Windows Gold Scheduler, so the colours will need to be set up again. They are applicable company wide and aim to help make jobs and priorities clear.

Once you've logged into Workshop Scheduler, follow the steps below to set up priority colours:

**Settings (bottom left of the portal) > Scheduler > Priority Colours**

Once you are on the Priority Colours page, a window will appear where your priority numbers and descriptions will be visible. We suggest you consider accessible, high contrast colour combinations that can easily be distinguished.

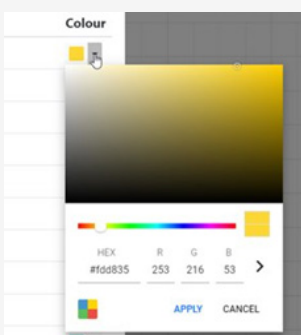
| Priority | Description       | Colour |
|----------|-------------------|--------|
| 10       | VOR ON SITE       |        |
| 11       | VOR WORKSHOP      |        |
| 12       | VOR WARRANTY      |        |
| 20       | SERVICE ON SITE   |        |
| 21       | SERVICE WORKSHOP  |        |
| 30       | WARRANTY ON SITE  |        |
| 31       | WARRANTY WORKSHOP |        |



**Note:** Priority numbers and descriptions are taken from the database.

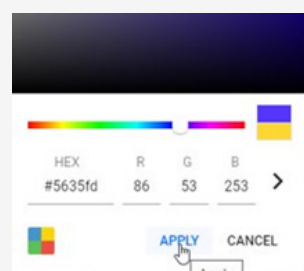
1.

Click the **arrow** beside the colour box.



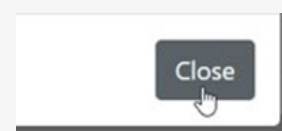
2.

Choose a colour and click **Apply**.



3.

Select **Close** when you have finished selecting your colours.

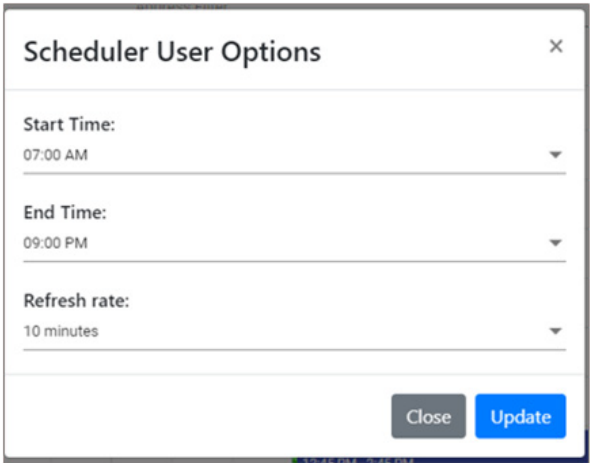


### 3.3 Setting Up Scheduling Hours

Scheduling Hours allows you to configure your daily and weekly views, changing the window of time shown. These changes are applied only to your Web Browser. If you log into a different device, your new device will use the default values.

Follow the steps below to change your window of time shown:  
**Settings (bottom left of the portal) > Scheduler > User Options**

1. **Start Time / End Time:** Change the times here to apply to your Daily and Weekly Views.  
You may prefer to extend this range during busy periods if engineers work beyond your typical working hours.
2. **Refresh rate:** You can also choose to have the screen refresh every 10, 15 or 30 minutes, or you can manually enter a bespoke refresh time. Manual bespoke times are ideal for wallboard views.

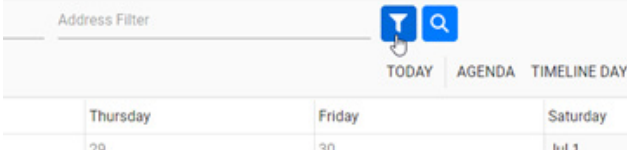


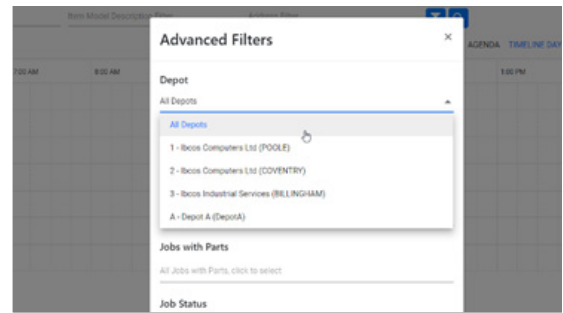
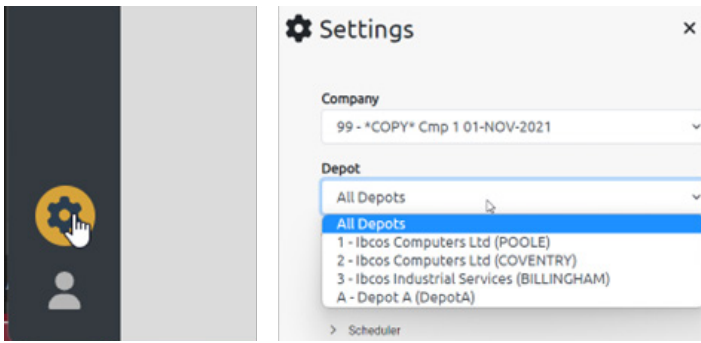
### 3.4 Changing Depot

There are two ways to change your depot:

Option 1:  
**Settings > Depot**

Option 2:  
**Advanced Filters > Depot**





## 4. USING THE MULTIPLE VIEWS

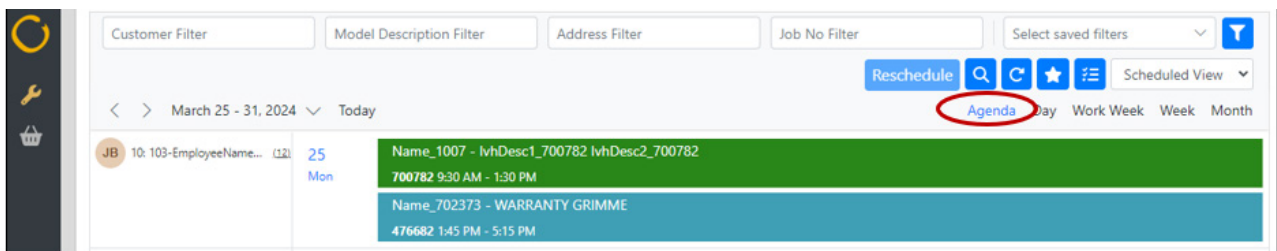
Workshop Scheduler offers views by day, week, month and engineer agenda.

Use the options on the top right-hand side of the screen to change the timeline you are viewing. The **Today** option will bring you back to today's view.



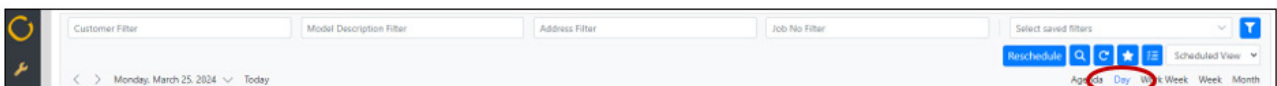
### 4.1 Agenda View

The **Agenda view** allows you to see all engineers scheduled work for the selected day in a list view.



### 4.2 Day View

The **Day view** allows you to see all engineers scheduled work for the selected day.



## 4.3 Work Week and Week View

The **Work Week view** allows you to see all engineers scheduled work for your set working week (i.e.: Monday – Friday excluding weekends):



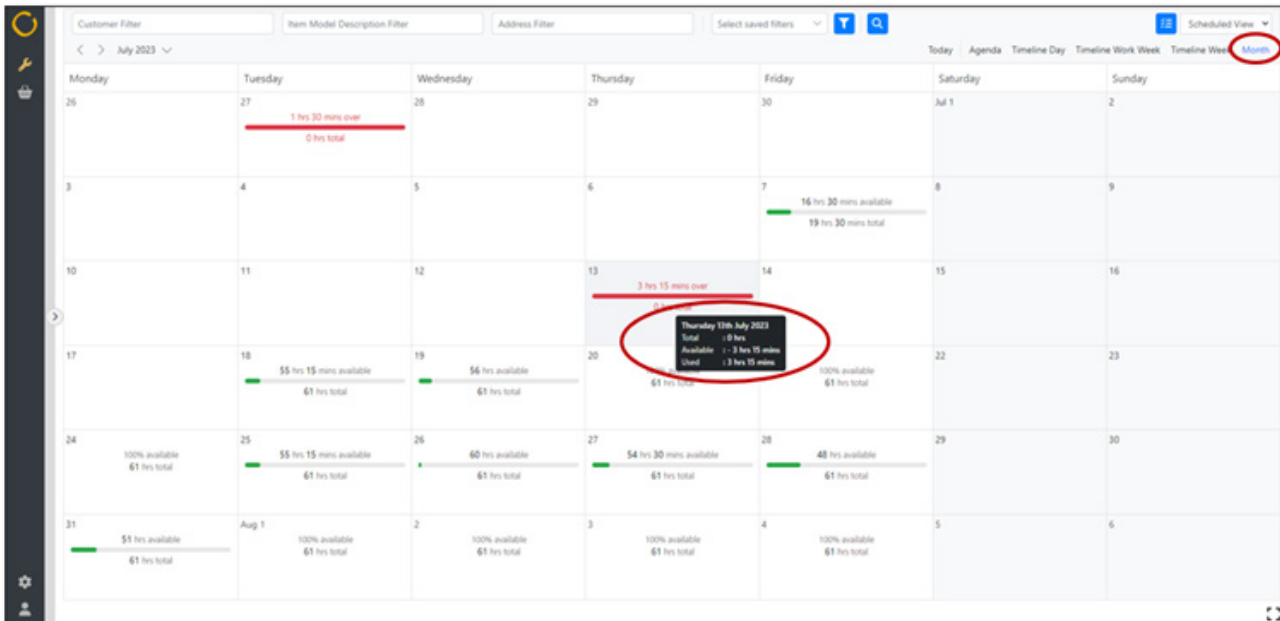
The **Week view** allows you to see all engineers scheduled work for the entire 7 days, regardless of how your working week is set:



## 4.4 Month View

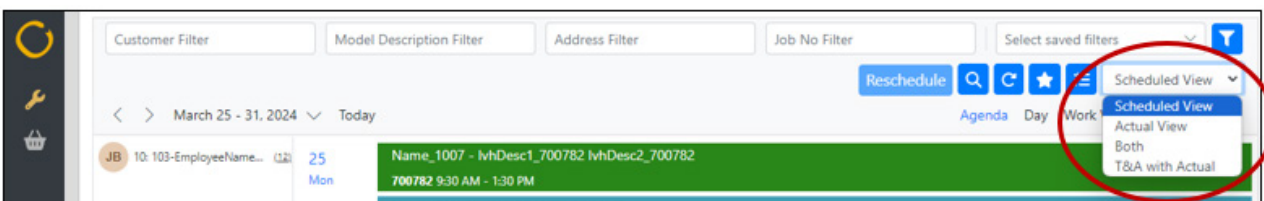
The **Month view** allows you to see all engineers scheduled work for the entire selected month. Each day will show the total hours available, and the total hours used for all engineers combined.

Click on any day from the **Month view**, and you will be navigated to the **Day view** for that specific date.



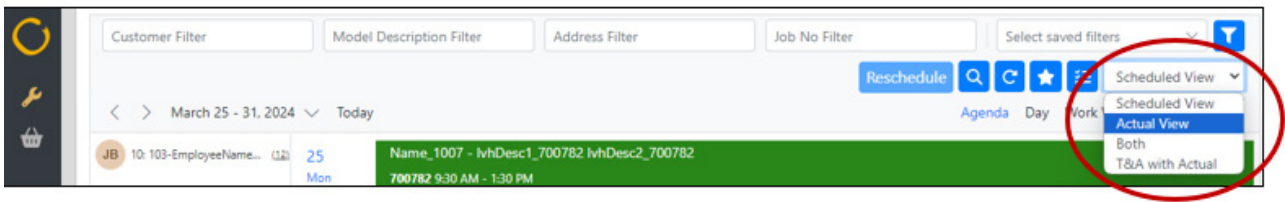
## 4.5 Scheduled and Activity View

**Scheduled view** will show you all schedules against the times they have been set. For example: A job that was scheduled from 09:00am – 12:00pm will show from 09:00am – 12:00pm.

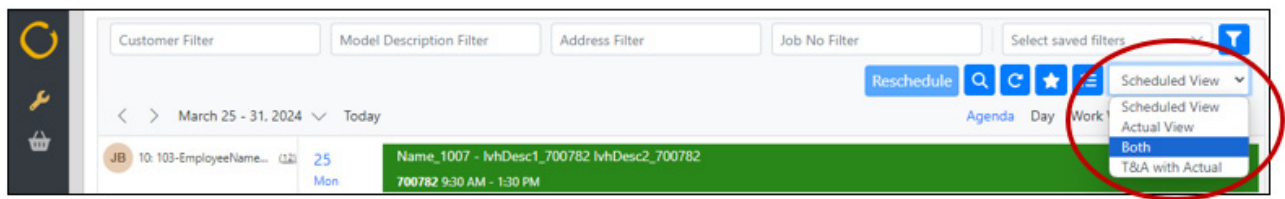




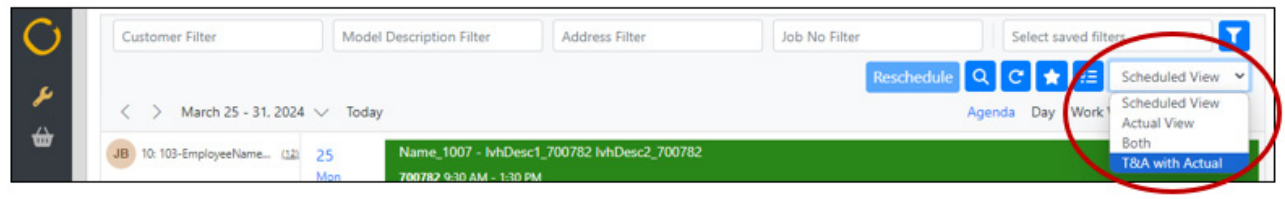
**Actual view** will show you all schedules against the time that the engineer has worked on them. For example: If a job was scheduled from 09:00am – 12:00pm, but the engineer worked on the job from 09:15am - 12:15pm, the job will show from 09:15am - 12:15pm.



**Both views** will show you the job as it was scheduled (in grey), as well as the actual time the engineer worked on the job (in your priority colour).



**T&A with Actual view** will show you the engineers logged time and attendance entries, as well as the actual time they have logged against schedules.

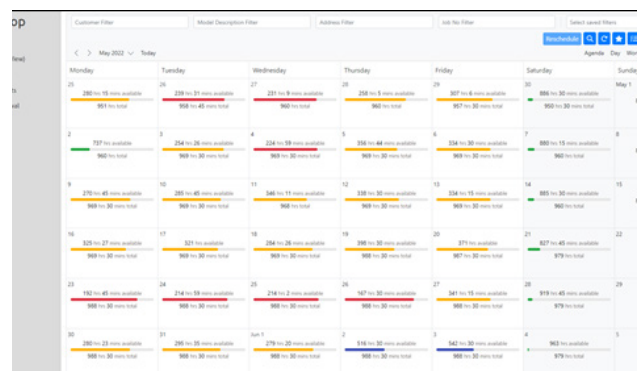


**Did you know?**  
 Actual activity will show as finishing early or increasing in 15 minute intervals until the engineer stops logging time on the job or marks their work as completed in the App.

## 5. UNDERSTANDING SCHEDULED JOBS

### 5.1 Parts status indicators

Parts chevrons are shown on the left-hand side of the schedule, and they indicate the status of the parts that have been added to the job. The colours of the chevron will change as the status of the parts gets updated.





### No Chevron

No parts have been added to the job



### Amber Chevron

Parts are on order for the job



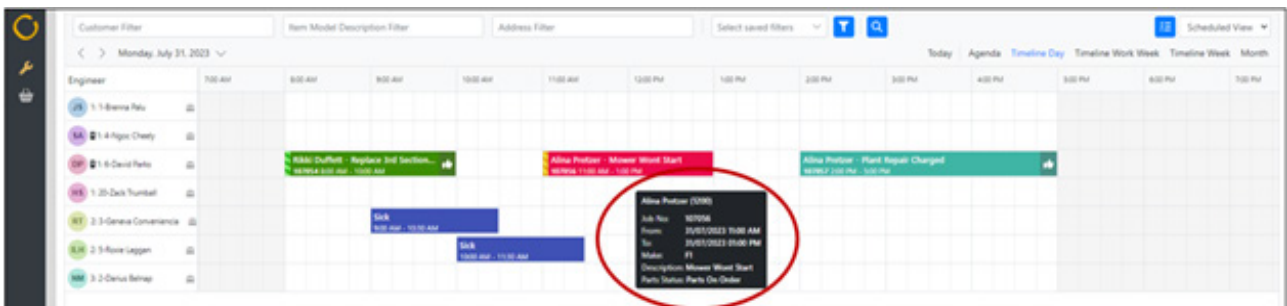
### Green Chevron

All parts are available for the job

## 5.2 Job Tool Tip and Job Quick View

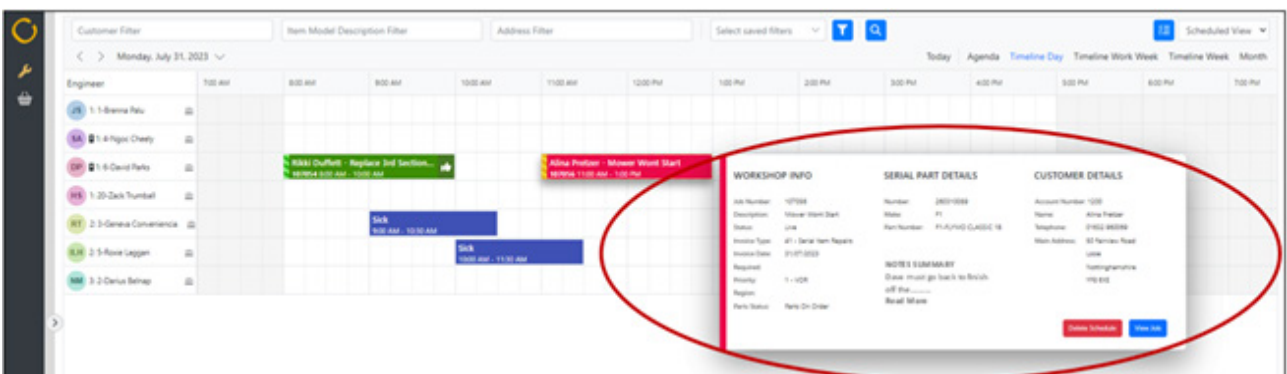
### Job Tool Tip

Hover over the job to bring up the **Tool Tip**, and see the Job Number, Date Range, Make, Description and Parts Status.



### Job Quick View

Left click on the job to open the **Quick View**. Here you can see the Workshop info, Category details, Customer details and a Notes summary. The colour down the left-hand side of the pop-up denotes the priority of the job.



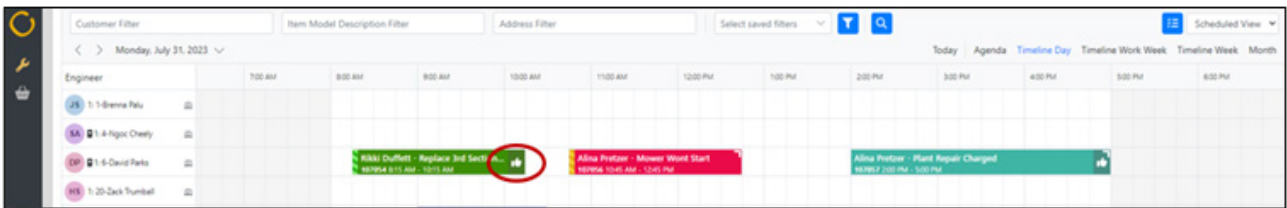


### Did you know?

If a customer has a delivery address on record, this will be displayed in the customer address section. If they don't have a delivery address on record, then the customer address will be displayed.

## 5.3 Job Status Indicators

Status icons are shown on the right-hand side of the schedule and denote the current status of the job. They will change as the job moves through its cycle.



Here are the different icons and what they mean:

|  |   |   |  |
|--|---|---|--|
| <br><b>Travel Started</b><br>Only shows when engineers are using Gold Service                                     | <br><b>Travel Stopped</b><br>Only shows when engineers are using Gold Service                              | <br><b>Labour Started</b><br>Only shows when engineers are using Gold Service              | <br><b>Labour Stopped</b><br>Only shows when engineers are using Gold Service     |
| <br><b>Single Engineer Completed Work</b><br>Appears on multi engineer jobs to show engineer completed their work | <br><b>All Engineers completed Work</b><br>All engineers associated with the job have completed their work | <br><b>Job Completed</b><br>Job has been completed in the Portal or is Logged for Checking | <br><b>Job Batched / Invoiced</b><br>The job has been batched or invoiced in Gold |

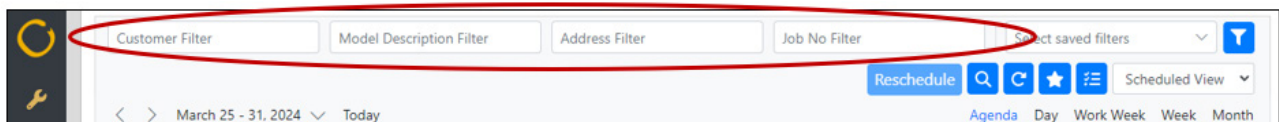


### Did you know?

If there is no icon on the schedule, then no labour or travel has been started.

## 6. NAVIGATING THROUGH WORKSHOP SCHEDULER

On the Scheduler home screen, you can filter by Customer, Item Model Description, Address and Job Number.



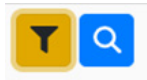
## 6.1 Advanced Filters

Advanced filters allow you to filter Jobs on your Workshop Scheduler.

1. Click on the **Advanced Filters** icon.



2. If the **Advanced Filters** is applied, the icon will **turn amber**.



3. Choose your filters and click **Apply**.

### Advanced Filters

Filter Name:   Set as Default

Departments:

Engineers:

Invoice Type:

Priority Codes:

Depot:   Filter Jobs by Depot  Filter Engineers by Depot

Additional Depots:

Jobs with Parts:

Job Status:

Created By:

Doing this will restrict the exact jobs you filter by.

You can filter by:

- Depot
- Department
- Engineers
- Invoice Type
- Priority Codes
- Jobs with Parts
- Job Status
- Created By

4. Once your search is complete, select **Clear** to reset your filters. This will **not affect the Depot** that you selected.



### Did you know?

You can create a customer filter that can be saved as a favourite. Simply click the **Advanced Filter** icon, give the filter a name, select the relevant criteria then press the **Save** button, before you press the **Apply** button.

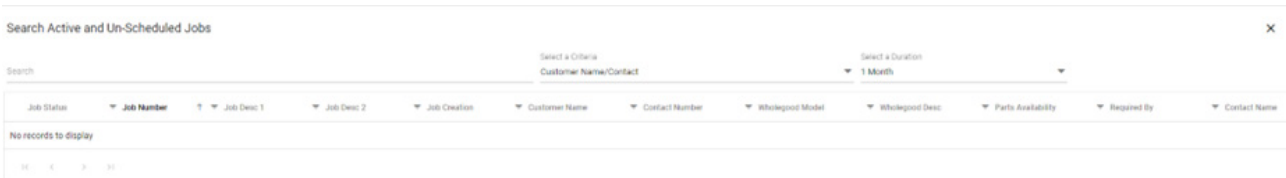
## 6.2 Performing a Search

Follow the steps bellow to perform searches on active and un-scheduled jobs.

1. Click on the **Search** icon.



2. A **new window** will appear with a **search entry, criteria, and duration**.



**Search** – needs to be at least 3 characters to search.

### Select a Criteria

- Customer Name/Contact
- Wholegood Model and Description
- Job Number
- Job Description
- Contact Number

There is also a free text search box that is used in conjunction with the criteria drop-down list. For example, if you enter 3 letters of the customer's phone number in the free text box and select **Contact Number** in the criteria drop down, it will find the job.

**Select a Duration** - selections are today's date plus the month chosen.

- 1 Month
- 2 Months
- 3 Months
- 6 Months
- Advanced Option – allows you to select a timeframe within a 6-month max period

Results are shown by **Required By date** first, if no Required By date is available, it then filters by **Job Creation date**. If that is not available, the result will be based by the **Engineers Scheduled Work date**.

3. Once details have been entered, click **Search** to view your results.

Search Active and Un-Scheduled Jobs

Search 107

Filter Jobs by Depot: All Depots

Select a Criteria: Job Number

Select a Duration: Advanced Option

Select a Date Range (3 Months Max): 01/07/2023 - 31/10/2023

| Job Status | Job Number | Job Desc 1       | Job Desc 2          | Job Creation     | Customer Name   | Contact Number | Wholegood Model | Wholegood Desc  | Parts Availability  | Required By | Contact Name    |
|------------|------------|------------------|---------------------|------------------|-----------------|----------------|-----------------|-----------------|---------------------|-------------|-----------------|
| Live       | 107020     | MhDesc1_107020   |                     | 26/05/2023 00:00 | Marion Goetin   | 01632 360063   | 406GTD719       | 406 1.9 GTDT    | All Parts Available |             | Marion Goetin   |
| Open       | 107027     | MhDesc1_107027   |                     | 19/06/2023 00:00 | Alex Shangraw   | 01632 360052   | MF4255          | NEW MF4255 4WD  | No Parts Found      |             | Alex Shangraw   |
| Logged     | 107028     | MhDesc1_107028   |                     | 23/06/2023 00:00 | Alex Shangraw   | 01632 360052   | 406GTD719       | 406 1.9 GTDT    | Parts On Order      |             | Alex Shangraw   |
| Printed    | 107031     | 500hr Service    | Bc1234              | 29/02/2020 00:00 | Alina Pretzer   | 01632 360069   | STOCK           | WHOLEGOOD STOCK | All Parts Available |             | Alina Pretzer   |
| Open       | 107033     | MhDesc1_107033   |                     | 07/07/2023 00:00 | Amado Demico    | 01632 360738   |                 |                 | No Parts Found      |             | Amado Demico    |
| Logged     | 107034     | Check And Repair | L100                | 07/07/2023 00:00 | Amberly Jaspers | 01632 360818   |                 |                 | No Parts Found      |             | Amberly Jaspers |
| Logged     | 107039     | 500hr Service    | Modul Brose Jaspers | 19/07/2023 00:00 | Ellie Duffell   | 01632 360050   | 8005            | TRACTOR         | All Parts Available |             | Jeff            |
| Live       | 107040     | Puddle           |                     | 19/07/2023 00:00 | Jodi Cassius    | 01632 360048   |                 |                 | Parts On Order      |             | 07885 458224    |
| Open       | 107041     | 75046            | 6215R               | 20/07/2023 00:00 | Genayn Schepke  | 0770290411     | 6215R           | TRACTOR         | No Parts Found      |             | A Person        |
| Open       | 107044     | Hydraulic Hoses  | Replacement         | 25/07/2023 00:00 | Hull Radziewicz | 0770290144     |                 |                 | No Parts Found      |             |                 |



**Did you know?**

Results can be further filtered by selecting the funnel arrow beside each of the columns.

4. Click on the **Job Number** to open the job and view more details. Alternatively, you can click on the **arrow** beside the **Job Status** of the job and click on the **Scheduled Date From** link to open the job in the **Timeline Day view**.

Search Active and Un-Scheduled Jobs

Search 107

Filter Jobs by Depot: All Depots

Select a Criteria: Job Number

Select a Duration: Advanced Option

Select a Date Range (3 Months Max): 01/07/2023 - 31/10/2023

| Job Status | Job Number | Job Desc 1      | Job Desc 2    | Job Creation        | Customer Name     | Contact Number | Wholegood Model | Wholegood Desc  | Parts Availability  | Required By | Contact Name  |
|------------|------------|-----------------|---------------|---------------------|-------------------|----------------|-----------------|-----------------|---------------------|-------------|---------------|
| Live       | 107020     | MhDesc1_107020  |               | 26/05/2023 00:00    | Marion Goetin     | 01632 360063   | 406GTD719       | 406 1.9 GTDT    | All Parts Available |             | Marion Goetin |
| Open       | 107027     | MhDesc1_107027  |               | 19/06/2023 00:00    | Alex Shangraw     | 01632 360052   | MF4255          | NEW MF4255 4WD  | No Parts Found      |             | Alex Shangraw |
|            |            | Schedule Status | Engineer Name | Scheduled Date From | Scheduled Date To | Duration       |                 |                 |                     |             |               |
|            |            | Scheduled       | Zack Trumball | 28/07/2023 11:15    | 28/07/2023 12:15  | 01:00          |                 |                 |                     |             |               |
| Logged     | 107028     | MhDesc1_107028  |               | 23/06/2023 00:00    | Alex Shangraw     | 01632 360052   | 406GTD719       | 406 1.9 GTDT    | Parts On Order      |             | Alex Shangraw |
| Printed    | 107031     | 500hr Service   | Bc1234        | 29/02/2020 00:00    | Alina Pretzer     | 01632 360069   | STOCK           | WHOLEGOOD STOCK | All Parts Available |             | Alina Pretzer |
| Open       | 107033     | MhDesc1_107033  |               | 07/07/2023 00:00    | Amado Demico      | 01632 360738   |                 |                 | No Parts Found      |             | Amado Demico  |

Use the toggle to include/exclude **Invoiced Jobs** within in your search results. Bear in mind that searching on invoiced jobs may slow the performance down.

Search Active and Un-Scheduled Jobs

Search

Filter Jobs by Depot: 1 - Boco Computers Ltd (POOLE)

Select a Criteria: Customer Name/Contact

Select a Duration: 1 Month

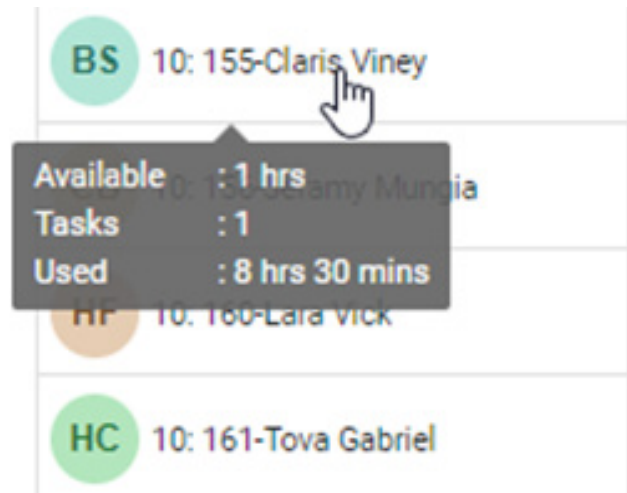
Include Invoiced:  NO

5. Search results are saved until they are reset by clicking **Reset** on the bottom right corner of the window.

## 6.3 Engineer Details

In your list of Engineers, you will be able to view their:

- **Initials:** The colour will be unique to the engineer and their initials, as stored in Gold, will be displayed.
- **Name:** Along with the engineer's name we also display their Department Code and Engineer Number.



The screenshot shows a list of engineers with a tooltip for 'BS 10: 155-Claris Viney'. The tooltip displays the following information:

|           |                 |
|-----------|-----------------|
| Available | : 1 hrs         |
| Tasks     | : 1             |
| Used      | : 8 hrs 30 mins |

Other visible entries in the list include 'HC 10: 161-Tova Gabriel' and a partially visible 'HR 10: 160-Lara Vick'.



### Did you know?

If you hover over the engineers' name, you will be able to view details for the engineer for the window of time you've selected.

- **Available:** Hours and minutes still available to use. This will turn red if they are over their working hours.
- **Tasks:** The number of jobs for the window of time you're viewing.
- **Used:** Amount of time allocated to them.

## 7. USEFUL INFORMATION



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Press Option 1



### Document Version:

28/03/2024



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