

Workshop Scheduler

Product Manual



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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.

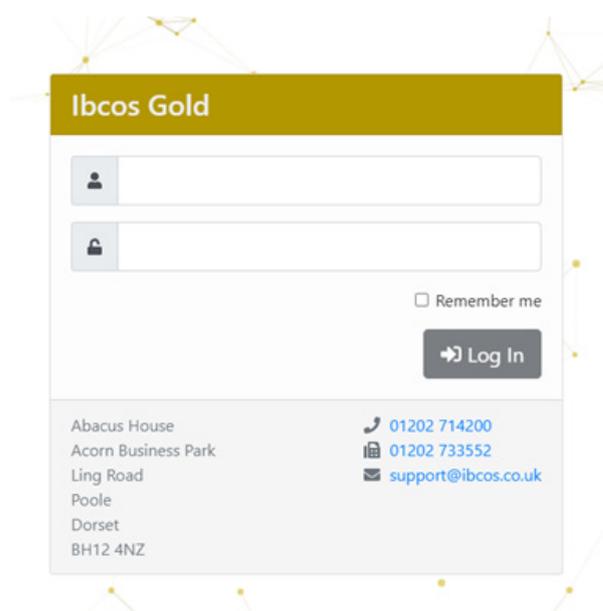
To use Workshop Scheduler, you must be running minimum **Gold version 7.31**.

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.

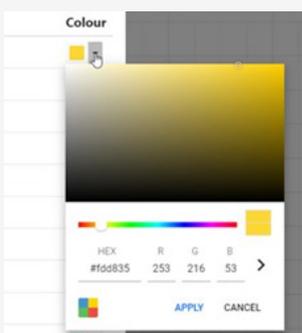
Priority	Description	Colour
10	VOR ON SITE	Yellow
11	VOR WORKSHOP	Light Green
12	VOR WARRANTY	Red
20	SERVICE ON SITE	Orange
21	SERVICE WORKSHOP	Yellow
30	WARRANTY ON SITE	Teal
31	WARRANTY WORKSHOP	Light Teal



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

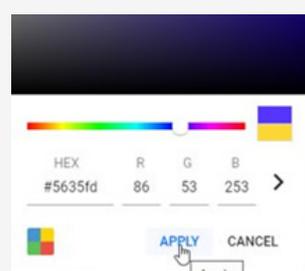
1.

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



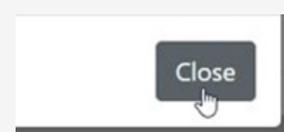
2.

Choose a colour and click **Apply**.



3.

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



3.3 Setting Up Scheduling Hours

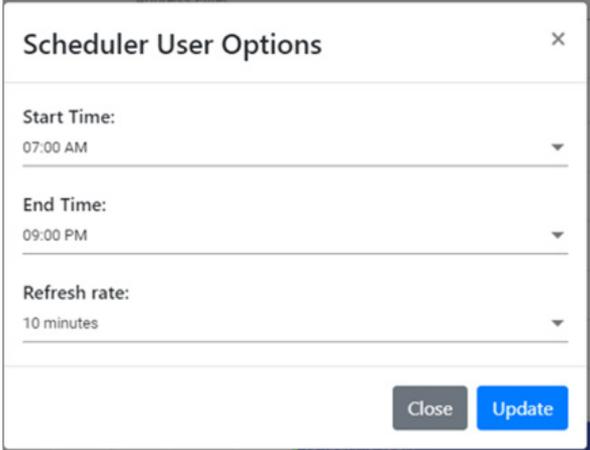
Scheduling Hours allows you to configure your daily and weekly views, changing the window of time shown. These changes are applied only to your Web Browser. If you log into a different device, your new device will use the default values.

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.



Scheduler User Options [X]

Start Time:
07:00 AM

End Time:
09:00 PM

Refresh rate:
10 minutes

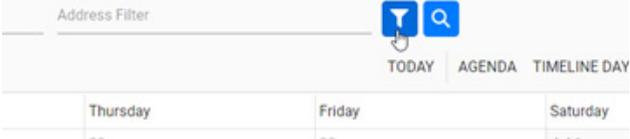
Close Update

3.4 Changing Depot

There are two ways to change your depot:

Option 1:
Settings > Depot

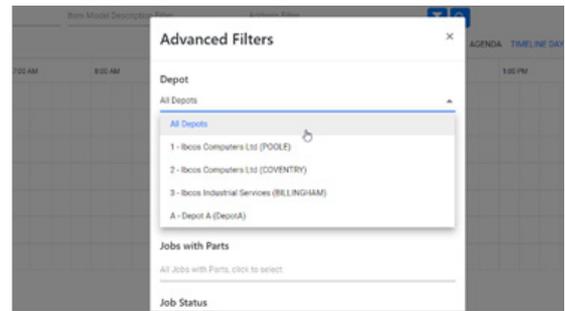
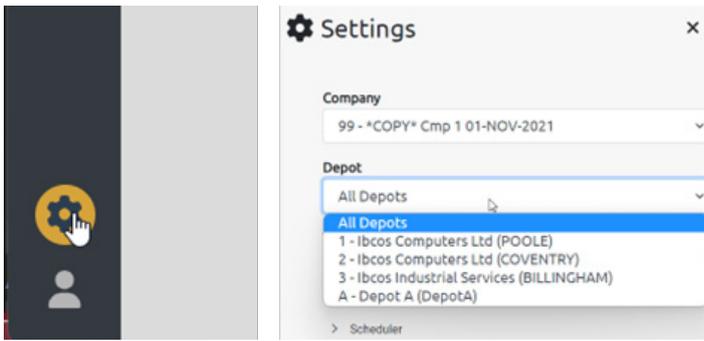
Option 2:
Advanced Filters > Depot



Address Filter [Search Icon]

TODAY AGENDA TIMELINE DAY

Thursday	Friday	Saturday
00	00	00



4. USING THE MULTIPLE VIEWS

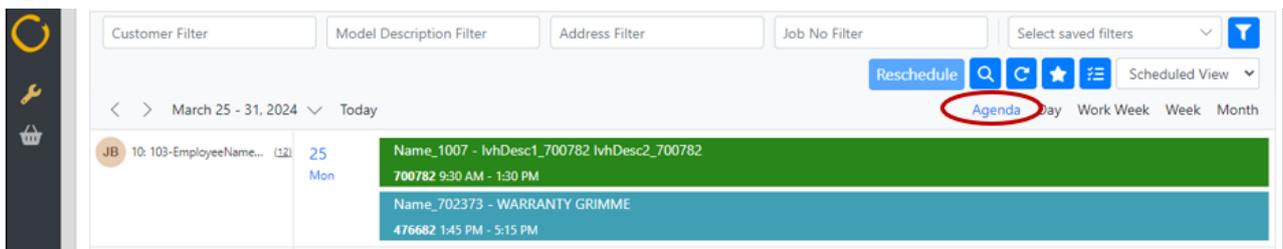
Workshop Scheduler offers views by day, week, month and engineer agenda.

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.



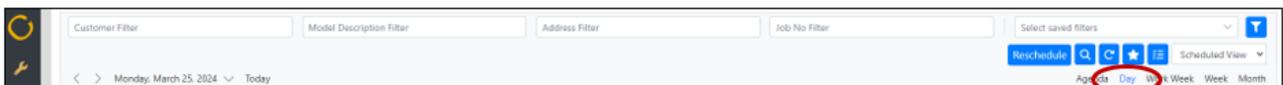
4.1 Agenda View

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):



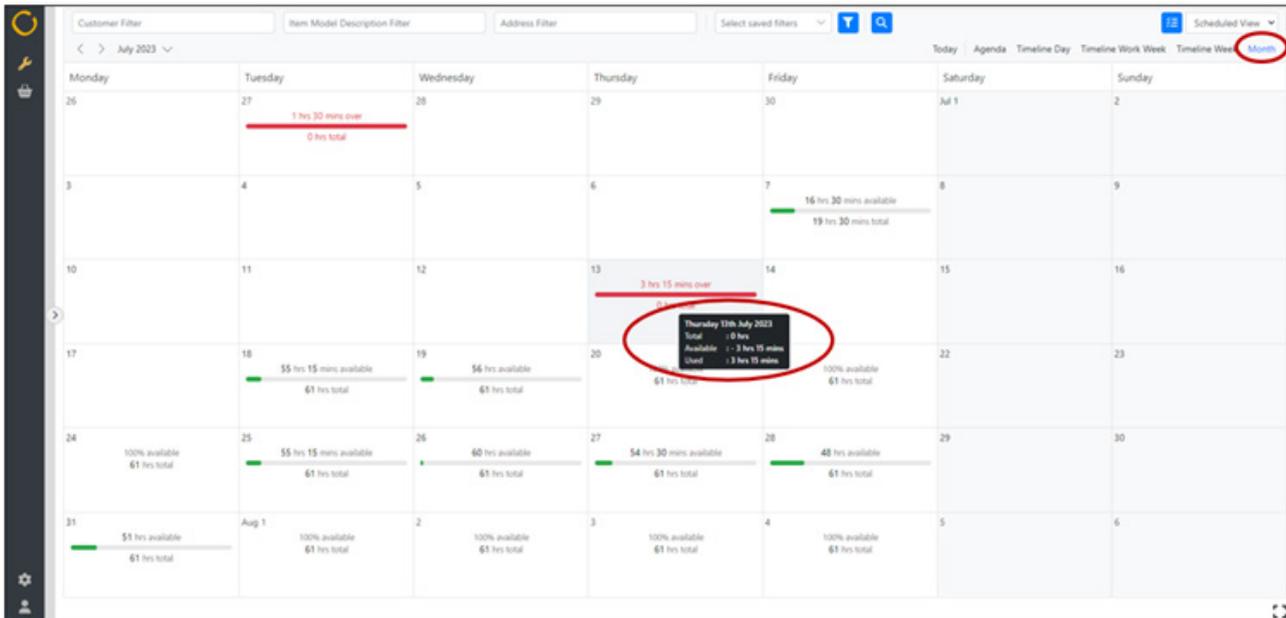
The **Week view** allows you to see all engineers scheduled work for the entire 7 days, regardless of how your working week is set:



4.4 Month View

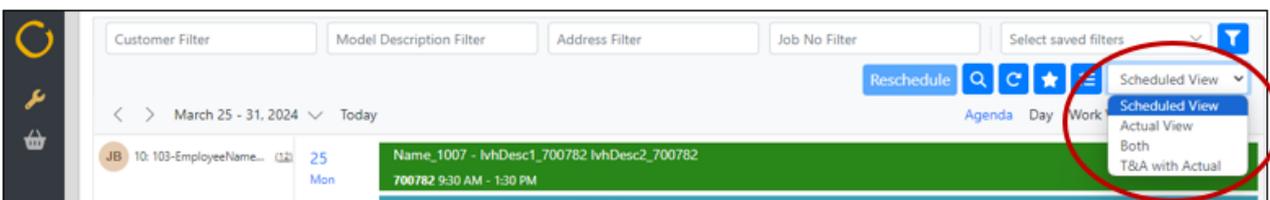
The **Month view** allows you to see all engineers scheduled work for the entire selected month. Each day will show the total hours available, and the total hours used for all engineers combined.

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

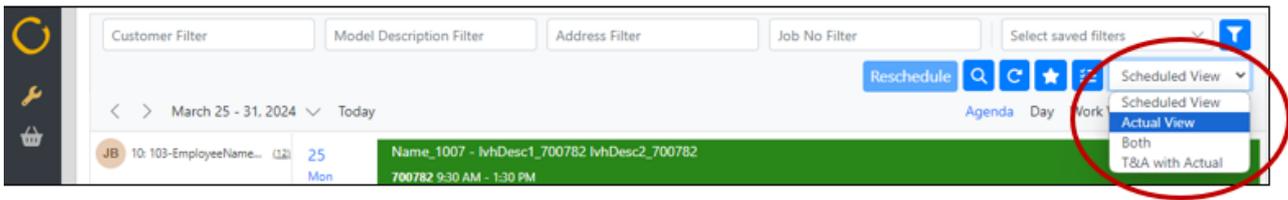


4.5 Scheduled and Activity View

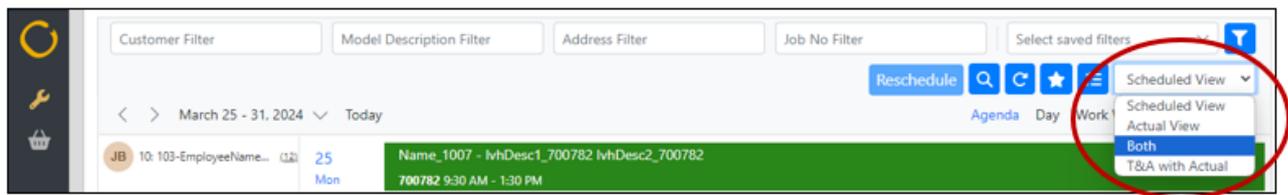
Scheduled view will show you all schedules against the times they have been set. For example: A job that was scheduled from 09:00am – 12:00pm will show from 09:00am – 12:00pm.



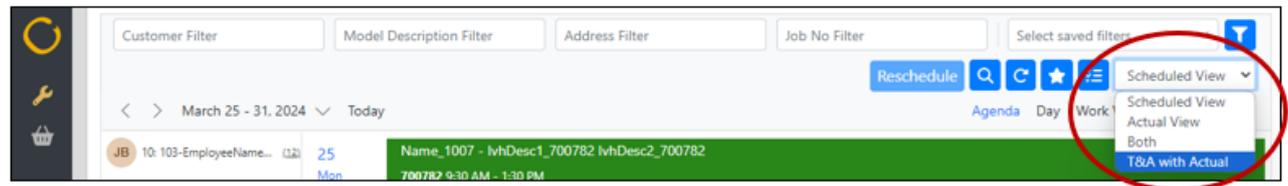
Actual view will show you all schedules against the time that the engineer has worked on them. For example: If a job was scheduled from 09:00am – 12:00pm, but the engineer worked on the job from 09:15am - 12:15pm, the job will show from 09:15am - 12:15pm.



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.



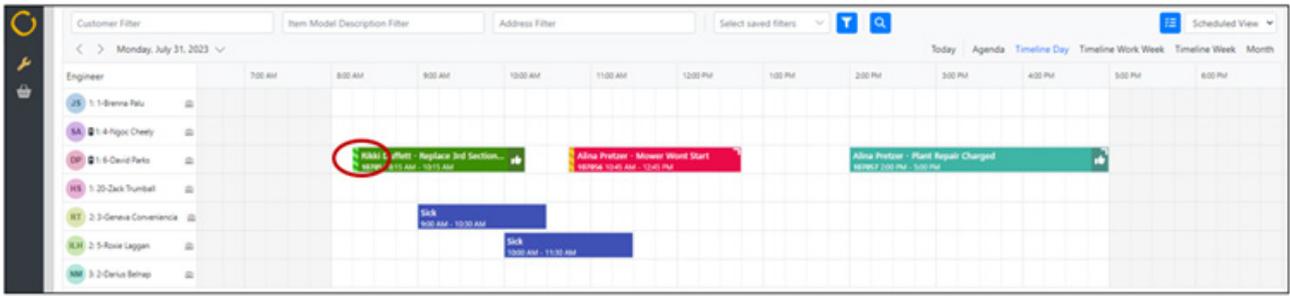
Did you know?
 Actual activity will show as finishing early or increasing in 15 minute intervals until the engineer stops logging time on the job or marks their work as completed in the App.

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



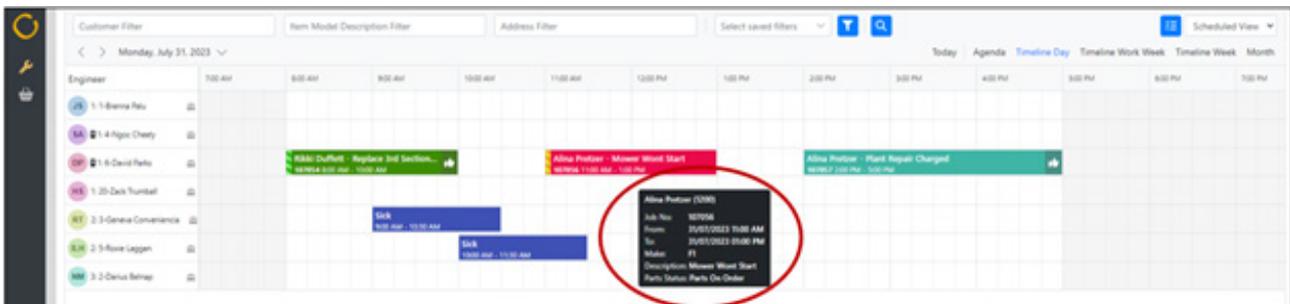
Green Chevron

All parts are available for the job

5.2 Job Tool Tip and Job Quick View

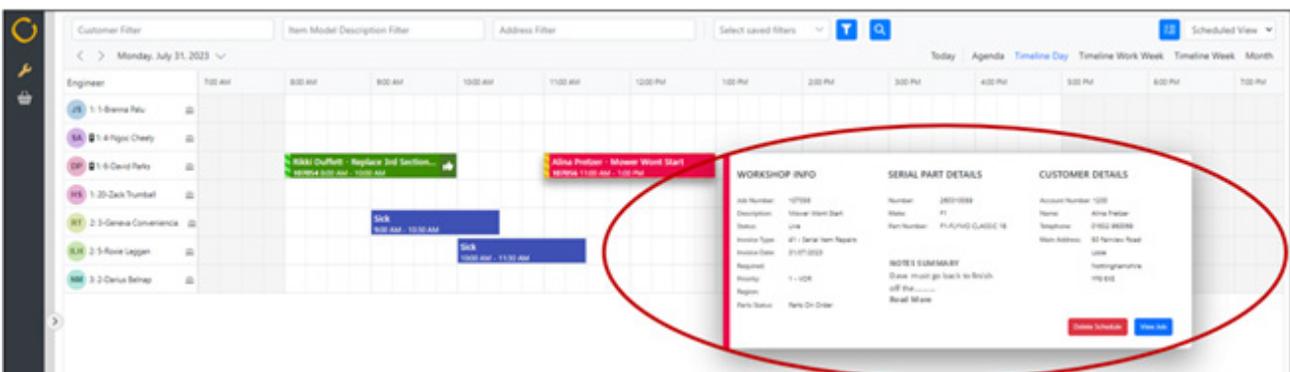
Job Tool Tip

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.



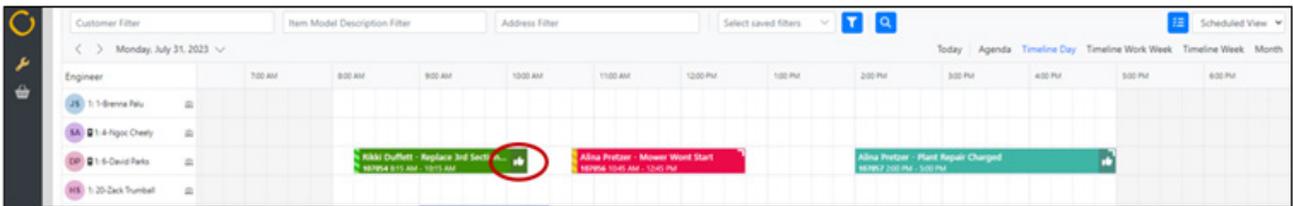


Did you know?

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:

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

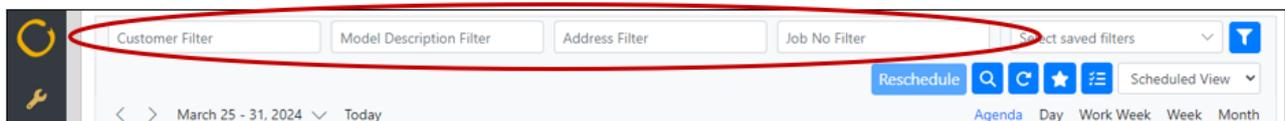


Did you know?

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.



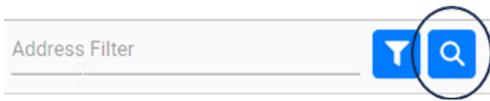
Did you know?

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.

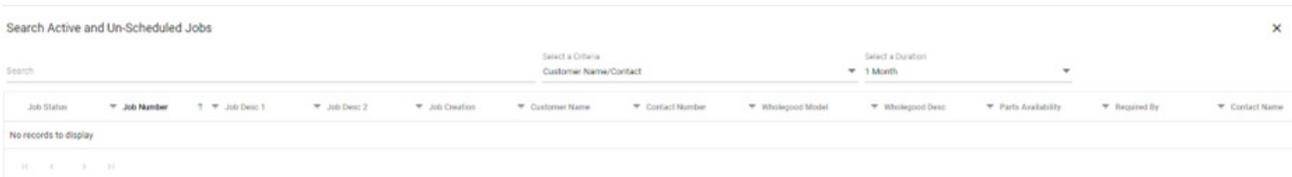
6.2 Performing a Search

Follow the steps below 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 360803	406GT0719	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	406GT0719	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		01/07/2023 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 Broek Jaspers	19/07/2023 00:00	Ellie Duffel	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	6219R	20/07/2023 00:00	Genayn Schepke	0730290411	6219R	TRACTOR	No Parts Found		A Person
Open	107044	Hydraulic Hoses	Replacement	25/07/2023 00:00	Hull Radziewicz	0730290414			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 360803	406GT0719	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	406GT0719	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		01/07/2023 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.

BS	10: 155-Claris Viney
HM	10: 160-Lara Vick
HC	10: 161-Tova Gabriel

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



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



Support Number:

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Press Option 1



Document Version:

07/04/2025



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