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.

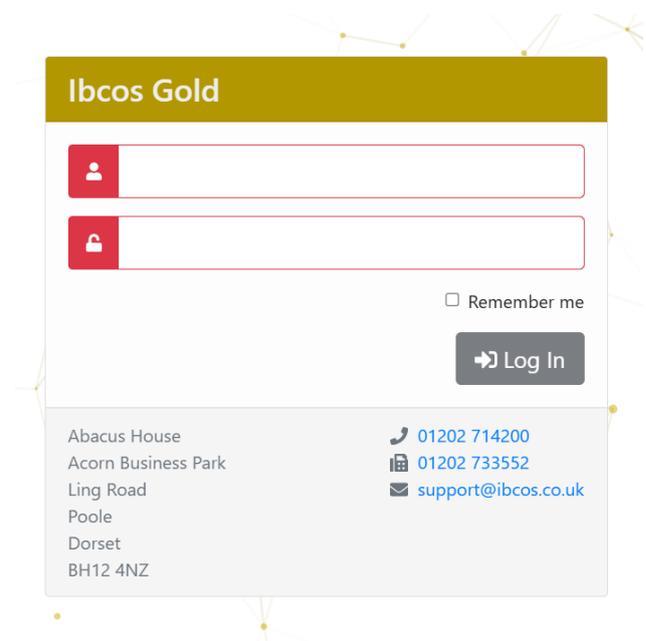## 2. LICENSING AND SYSTEM ADMINISTRATOR SET UP

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.

Ibcos Gold

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➜| Log In

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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, navigate to

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

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.
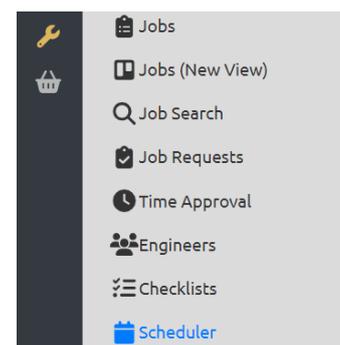
Ibcos Gold

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•••••••••••

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📋 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 Scheduler option in the menu.

3.2 Setting Up Scheduler Colours

Colours can be set on jobs to show their priority or blocked out time. These colours will not be pulled through from 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 colours.

> In Scheduler, navigate to
>
> **Settings (bottom left of the portal) > Scheduler > Scheduler Colours**

Once you are on the Colours page, a window will appear where your Block Out Time options and Priority numbers and descriptions will be visible. We suggest you consider accessible, high contrast colour combinations that can easily be distinguished.
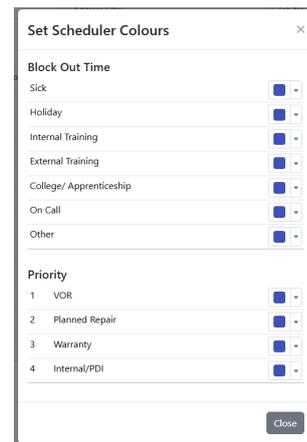
Note: Priority numbers and descriptions are taken from the database.

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.

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 ✕

Start Time:
12:00 AM

End Time:
Midnight

Refresh rate:
10 minutes

Week Timeline Mode:
Rolling

Week Timeline Offset:
-1 Day

Close Update

3.4 Changing Depot

There are two ways to change your depot:

Option 1

Settings > **Depot**

Option 2

Advanced Filters > **Depot** > **Apply**

4. USING THE MULTIPLE VIEWS

Workshop Scheduler offers views by day, week, month, and engineer agenda. The week view includes a rolling option, allowing you to track upcoming jobs beyond a single static week, helping you plan ahead and adjust schedules more efficiently.

The **Today** option will bring you back to today's view.

Use the options on the top right-hand side of the screen to change the timeline you are viewing.

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

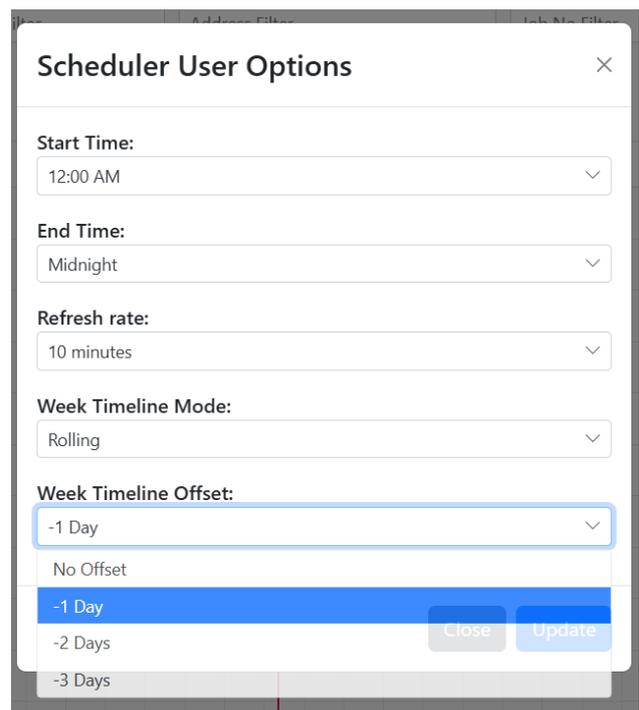The **Work Week** view allows you to see all engineers scheduled work for your set working week(for example, Monday to Friday excluding weekends).
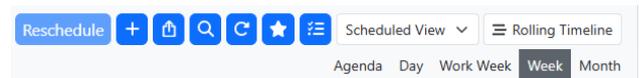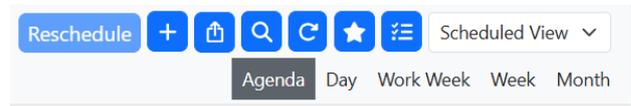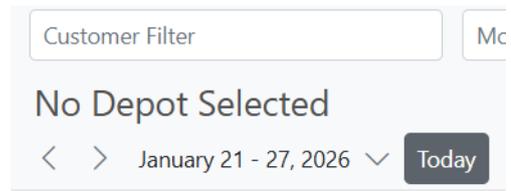
The **Week** view allows you to see all engineers' scheduled work across the full seven-day period, regardless of how your working week is configured.

The **Week** view can be displayed as either a static or rolling timeline. The rolling option allows you to move continuously through upcoming weeks, helping you track future jobs and plan ahead more effectively. To enable and configure the rolling week view, follow the steps below:

1. Open the **Settings** menu by clicking the **Cog** icon, then navigate to **Scheduler** > **User Options**.

2. Under **Week Timeline Mode**, choose between **Static** and **Rolling** using the dropdown menu. Select **Rolling** to enable the rolling week view.

3. In the **Week Timeline Offset** field, choose your preferred offset. For example, setting the offset to **-1 Day** will display the current week plus one additional day from the previous week.

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.
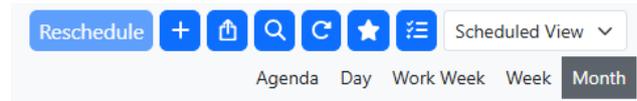
4.5 Scheduled and Activity View

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 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 will show you the engineers logged time and attendance entries, as well as the actual time they have logged against schedules.
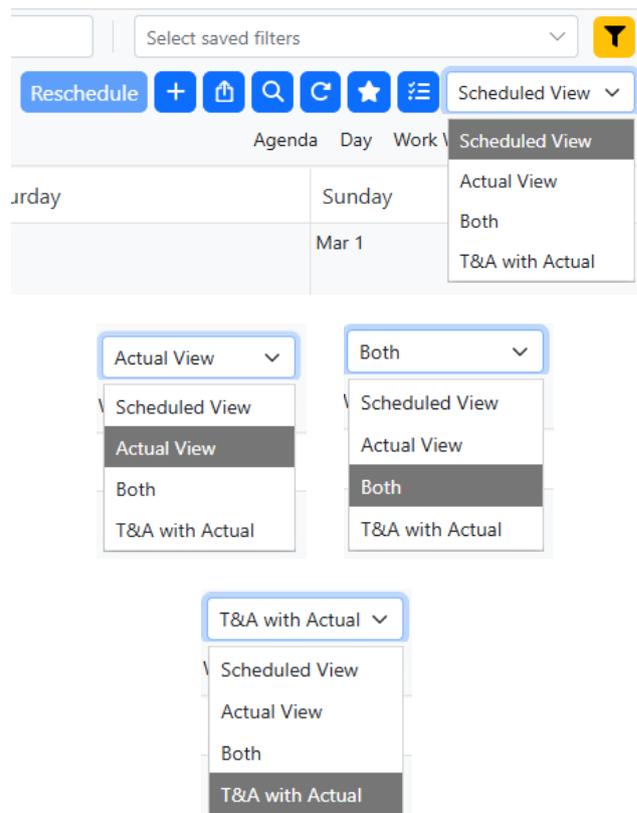
> **Did you know?**
> Actual activity will show as finishing early or increasing in 15 minute intervals until the engineer stops logging time on the job or marks their work as completed in the App.

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.
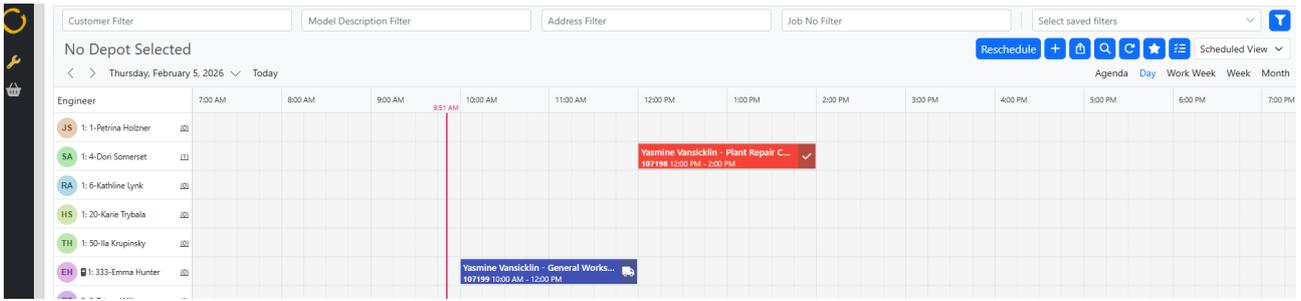
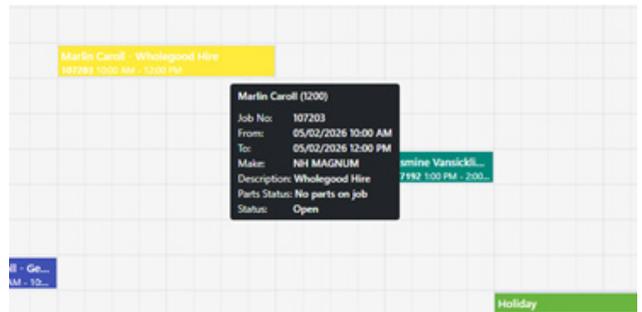|		
No Chevron	**Amber Chevron**	**Green Chevron**
No parts have been added to the job.	Parts are on order for the job.	All parts are available for the job.

5.2 Job Tool Tip and Job Quick View

Job Tool Tip

Hover over a job to bring up the **Tool Tip**. You will 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 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, Model Description, Address and Job Number.
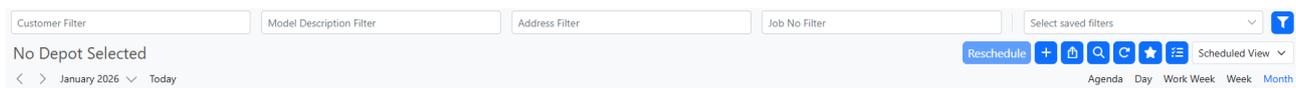
6.1 Advanced Filters

Advanced filters allow you to filter Jobs on Scheduler.

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

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

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

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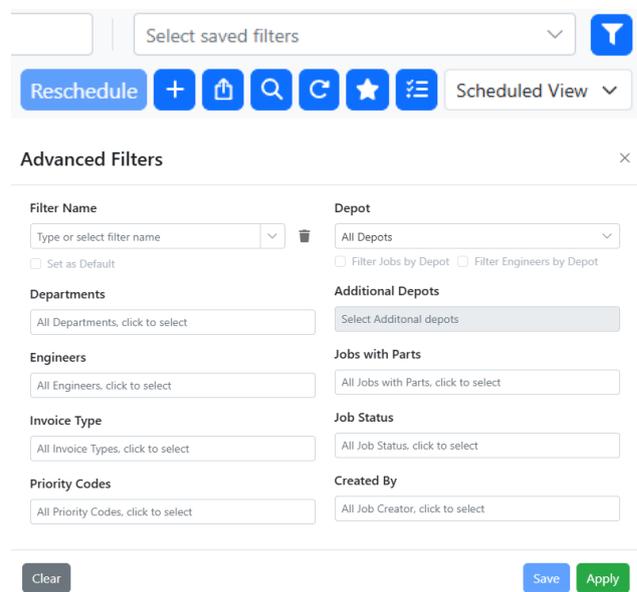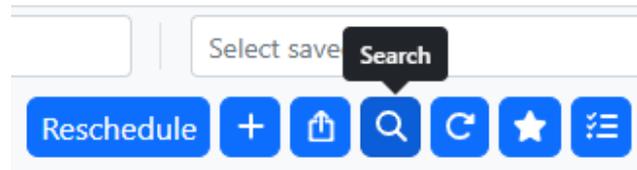

> 💡 **Did you know?**
> You can create a customer filter that can be saved as a favourite. Simply click the **Advanced Filter** icon, give the filter a name, select the relevant criteria then press the **Save** button, before you press the **Apply** button.

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 search fields including Customer, Registration and more.

3. Select **More Options** to view more filter options.

4. Tick the checkbox to **Include Repeatable** or **Include Invoiced** jobs in your search. Bear in mind that searching on invoiced jobs may slow the performance down.

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

6. Results are shown by **Required Date** first, if no Required Date is available, it then filters by **Created Date.** If that is not available, the result will be based by the **Engineers Scheduled Work Date.**

7. 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.

8. Search results are saved until they are reset by clicking **Reset.**

Did you know?
Results can be sorted in ascending or descending order by clicking the column titles.

6.3 Engineer Details

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

Initials: Displayed inside a coloured circle unique to each engineer. The initials are taken from Gold.

Name: Displays the engineer's name, along with their Department Code and Engineer Number.

Available: The remaining hours and minutes available. This turns red if the engineer exceeds their working hours.

Tasks: The number of jobs assigned within the selected time window.

Used: The total amount of working time already assigned to the engineer.

Engineer		
JS	1: 1-John Skill	(2)
SA	Available : 8 hrs	(3)
	Tasks : 3	
MS	Used : 2 hrs	(0)

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.

7. USEFUL INFORMATION

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