Work In Progress (WIP) Boards

Product Manual

ibcos

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1. INTRODUCTION

Work in Progress (WIP) Boards is a digital tool that provides a clear visual overview of jobs currently in progress within your workshop. Replacing traditional paper-based systems, the WIP Module displays jobs using configurable boards. Each board consists of job cards relevant to the criteria selected during set up, helping teams monitor work, identify priorities and track progress more easily.

Using live data pulled directly from Gold and colour-coded icons, you have access to key job information, including:

- [x] Job Age
- [x] Assigned or Unassigned Status
- [x] Engineer Details
- [x] Scheduled Status
- [x] Parts Information
- [x] Description Line 1

2. ACCESSING WIP BOARDS

To access WIP Boards:

1. Log into the Portal.

2. Select **Workshop** from the navigation menu.

3. Select **WIP Boards**.

4. This will open the **WIP Boards Library**, where all available boards are stored.

3. WIP BOARDS LIBRARY

The WIP Boards Library displays all available boards that you can access. Boards are organised into three sections:

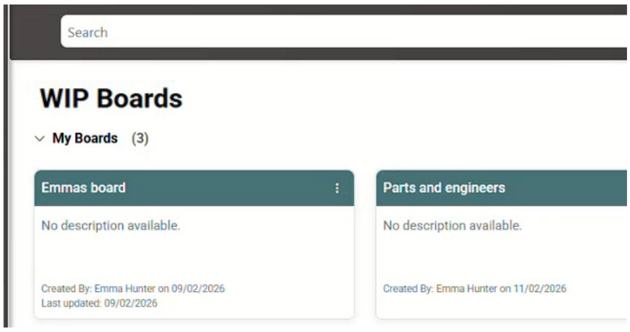
- My Boards
- System Boards
- Shared Boards

Each board is displayed as a card showing key information, including the board name, description, creator, date created, and last updated date. This helps you quickly understand the purpose of a board before opening it.

3.1 My Boards

The My Boards section contains boards that you have created yourself. These boards are private to you unless you choose to share them with other users. Boards in this section can be:

- Edited (by you)
- Duplicated (by everyone if they are public)
- Deleted (by you)

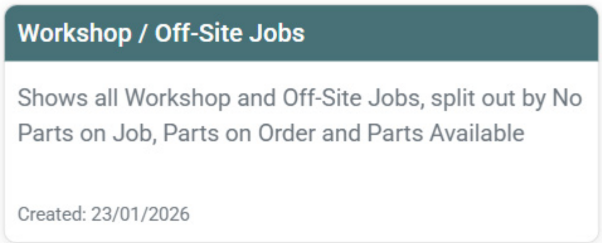


3.2 System Boards

System Boards are standard boards that are provided with this module. These boards are created by Ibcos and offer ready-to-use views for common workshop processes. System boards cannot be edited or deleted, but they can be duplicated, allowing you to customise versions of them for your own requirements. The two pre-configured system boards help you track jobs efficiently.

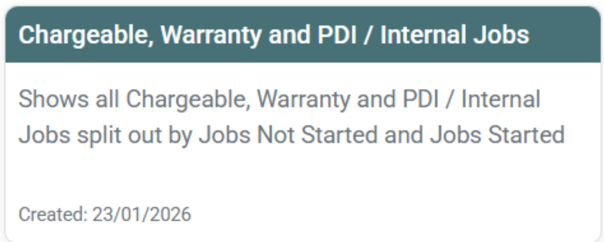
Workshop & Offsite Jobs – shows all jobs split out by:

- No Parts
- Parts on Order
- Parts Available



Chargeable, Warranty & PDI Internal Jobs – shows all jobs split out by:

- Jobs Not Started
- Jobs Started

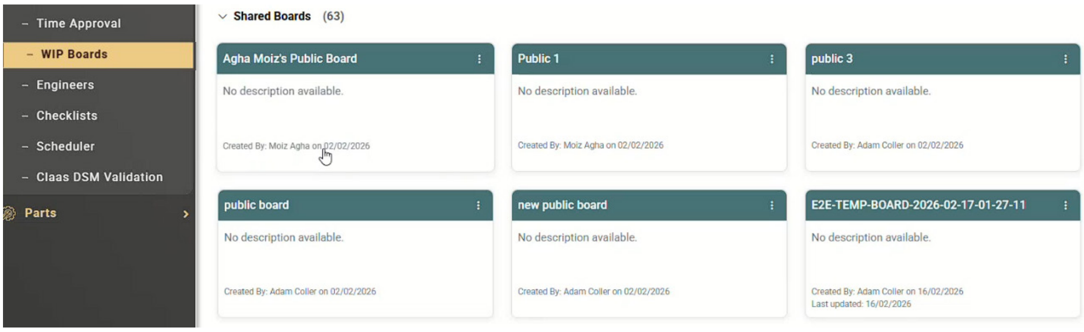


Did you know?
Duplicating a System Board creates a copy in **My Boards**, which you can then customise without affecting the original. Learn more in section 4.2.

3.3 Shared Boards

Shared Boards are boards created by other users that have been made available for everyone to use. These boards allow teams to share useful job views across the organisation.

- Shared Boards can be duplicated, but they cannot be edited or deleted unless you are the original creator.
- When opening a Shared Board created by another user, the board will open in View Only Mode, meaning editing options are disabled.
- You can still view the criteria used on the board, but you cannot amend it.



Did you know?
You can duplicate a Shared Board to create your own editable version. The duplicated board will appear in My Boards, where it can be customised without affecting the original board. Learn more in Section 4.2.

4. MANAGING BOARDS

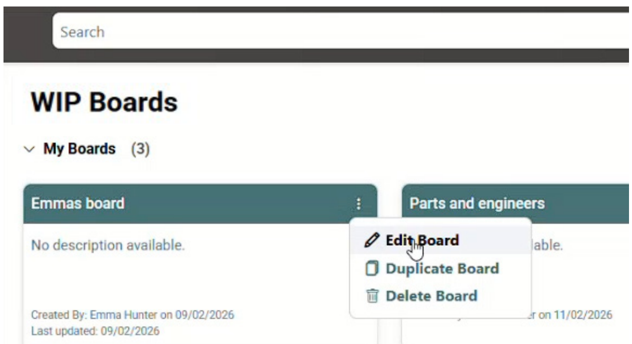
Boards can be managed directly from the WIP Boards Library. Depending on ownership and permissions, you can edit, duplicate, delete or create new boards to suit your work-flow. The following actions are available based on the board type:

- My Boards – you can edit, duplicate or delete boards you have created.
- System Boards – you can duplicate but cannot edit or delete.
- Shared Boards – you can duplicate but cannot edit or delete.

4.1 Editing a Board

Boards that you have created yourself can be edited. To edit a board:

1. Locate the board in My Boards.
2. Open the Board Menu.
3. Select Edit Board.



Did you know?
Changes made to **Column Criteria** when you edit or duplicate a board are permanently saved. A blue banner will appear to confirm your changes have been saved. If you only need a temporary view, use the **Quick Filter** button on the Board view instead. Learn more in Section 7.

4.2 Duplicating a Board

Boards can be duplicated to create a new version that you can modify. To duplicate a board:

1. Locate the board in the **WIP Boards Library**.

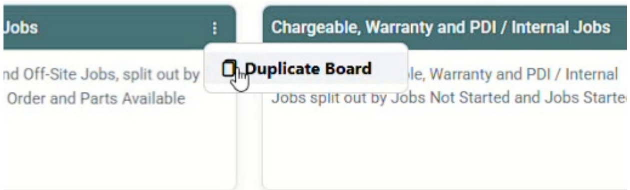
2. Open the **Board Menu**.

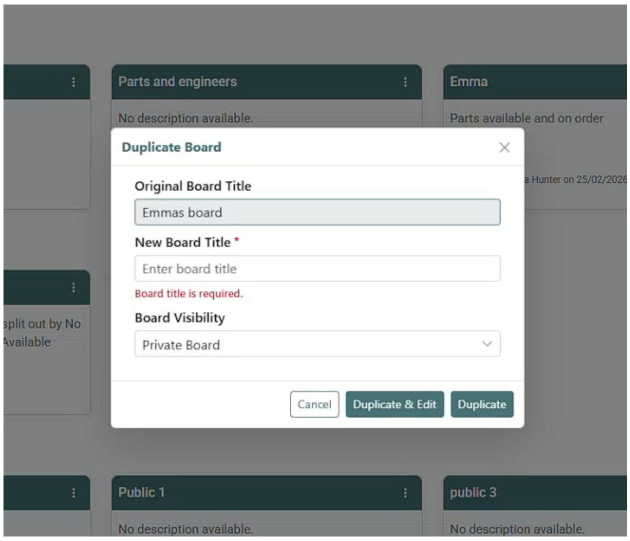
3. Select **Duplicate Board**.

4. Enter a **New Board Title** for the duplicated board. The title must be unique and cannot be the same as the original board.

5. Set your **Board Visibility** to **Private** or **Public**.

6. Choose either **Duplicate** to create an exact copy in **My Boards**, or **Duplicate & Edit** to create the board and open it for editing.





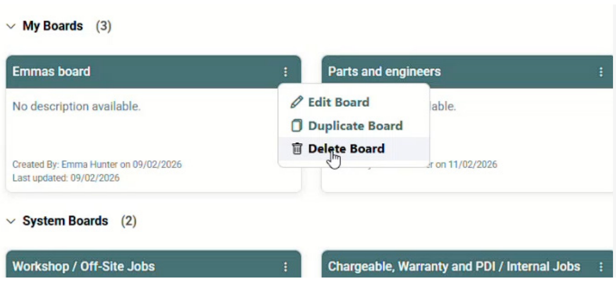
4.3 Deleting a Board

System Boards and Shared Boards cannot be deleted. Boards you have created can be removed if they are no longer needed. To delete a board:

1. Locate the board in **My Boards**.

2. Open the **Board Menu**.

3. Select **Delete Board**.



4.4 Creating a New Board

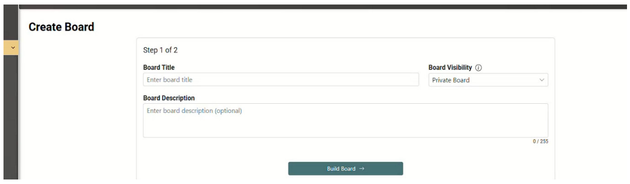
Users with the appropriate permissions can create a new board, which will automatically appear in the My Boards section.

1. Select Create Board from the WIP Boards Library.

2. Enter a Board Title and Description (up to 255 characters).

3. Choose a Board Visibility: Public to make it visible to all users or Private to make it visible only to you.

4. Click Build Board to start adding columns and groups.



Boards are organised into Groups, which contain Columns. Each column represents a specific set of jobs based on criteria.

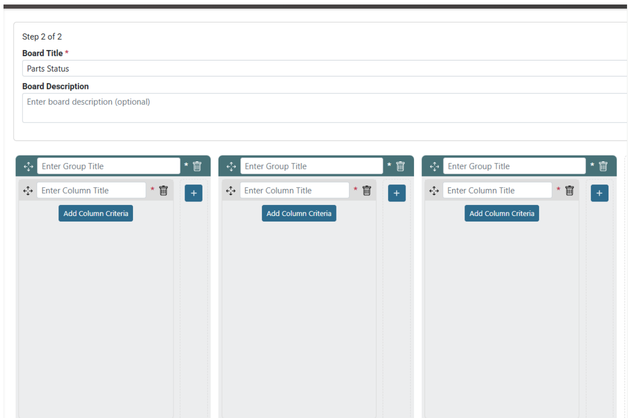
5. Enter a Group Title such as Parts. This acts like a section of your board. You can have multiple groups for different categories of work.

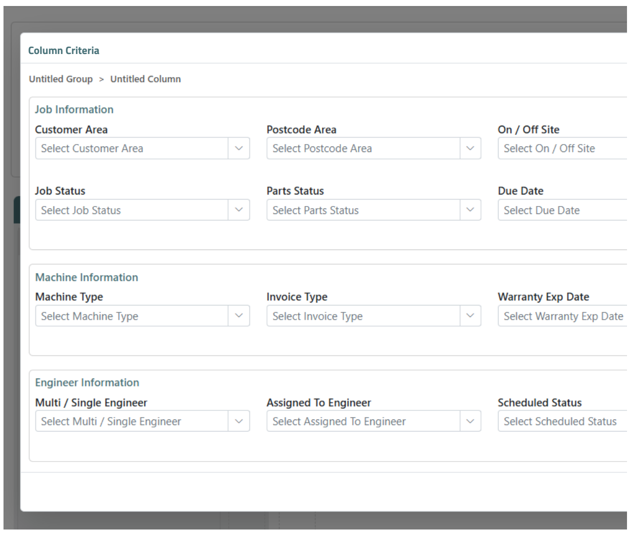
6. Enter a Column Title within the group such as Parts on Order or Parts Available.

7. Columns display jobs that match specific criteria. To define the criteria for each column, select the Add Column Criteria button within the column.

8. Set Column Criteria. For example, for the Parts on Order column, select Part Status = Parts on Order.

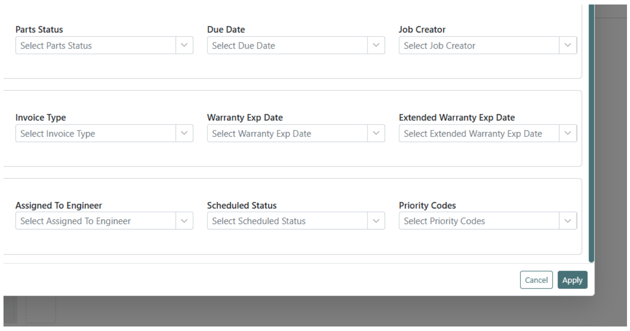
- Use Included to show only selected items or Excluded to hide selected items.





- You can customise the criteria further by invoice type, job type or other fields.

9. Select **Apply** to add the selected criteria to the column.

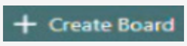


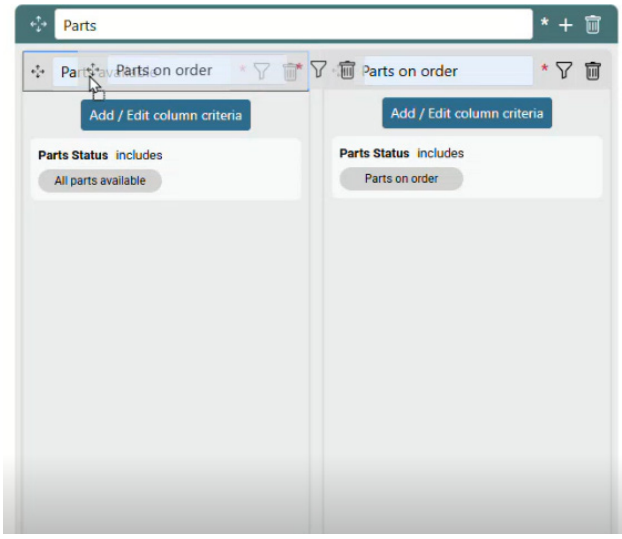
Did you know?
You can use **Included** or **Excluded** to control which criteria appear in a column. For example, if you have 100 invoice types but only want to show 3, select those 3 and choose **Included** to display only them. If you want to show the other 97 instead, select the 3 you don't want to see and choose **Excluded**.

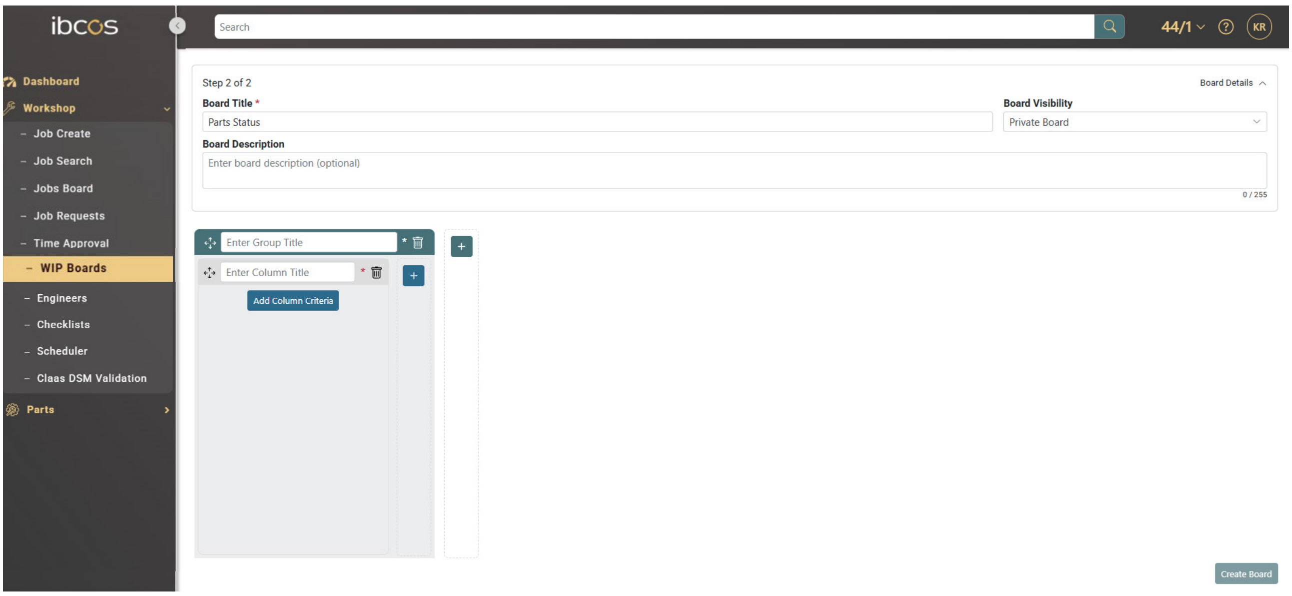
10. Adjust columns and groups as needed. You can **drag and drop** to change the order, or select the **Bin** icon to delete.

11. Add more groups and columns if needed, repeating the process to create additional sections for your board.

12. Once your board is set up, click **Create Board** to publish it.







5. UNDERSTANDING JOB CARDS

Each job on a WIP Board is displayed as a job card. Job cards provide key information at a glance to help you manage workshop tasks efficiently.

5.1 Job Card Overview

Hover over each icon to see a tooltip that explains its function.

Column Count
Shows how many jobs are in that column.

Priority Colour
Coloured bar down the side of the card, matching the priority set in Scheduler.

Job Number
The unique identifier for the job.

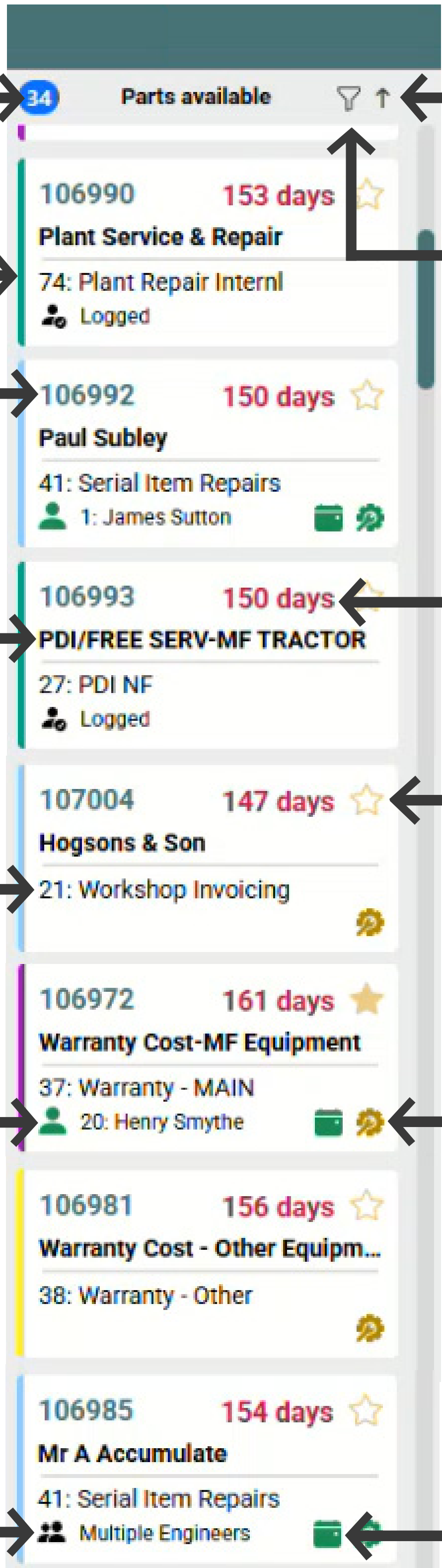
Customer Name
The name of the customer for the job.

Description
The first line of the job description.

Engineer Name(s)
Shows who is assigned to the job. Colour-coding indicates scheduling status:

- Green: assigned and scheduled
- Amber: assigned but not scheduled
- No Icon: not assigned or scheduled

Multiple Engineers
Indicated by a multi-engineer icon. Engineer names are not shown on the card. Select the card to view all assigned engineers and their future schedules in Quick View.



Sort Function
Allows sorting jobs by created date (ascending/descending).

Column Criteria
Allows permanent edits to column criteria from within boards you have created. For boards created by other users, the column criteria can be viewed but not edited.

Job Age
Colour-coded by how long the job has been open:

- Green: 1–7 days old
- Amber: 8–30 days old
- Red: 30+ days old

Favourites
Star icon to mark/unmark the job as a favourite. Any jobs marked as favourite will also be visible in the favourites list in Scheduler.

Parts Status
Colour-coded icon indicates availability of parts:

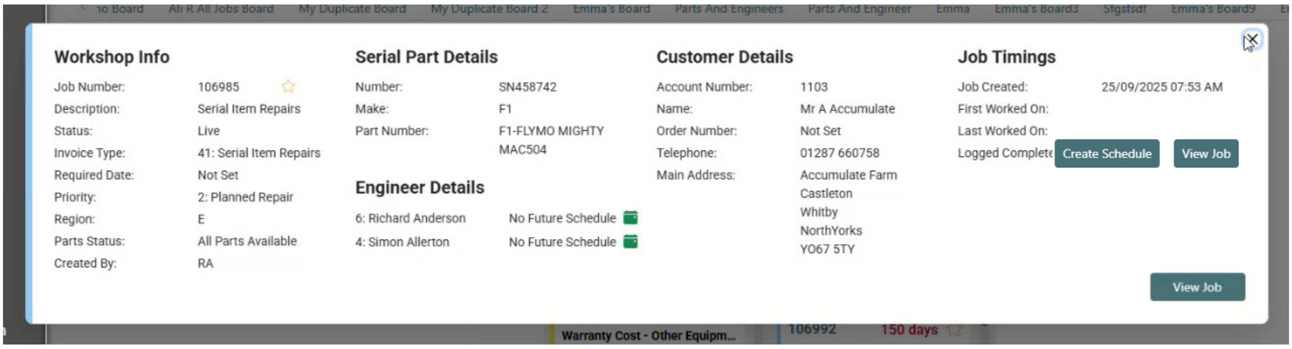
- No Icon: No parts assigned to the job
- Amber: Parts on order or partially available
- Green: All parts available

Scheduled Status
Calendar icon indicates that the job is scheduled.

Did you know?
Jobs marked as logged display **Logged** on the Job Card instead of the engineer's name. Jobs assigned to more than one engineer display **Multiple Engineers**. To view the engineer details, open **Quick View** by clicking on the job.

Viewing Job Details

Clicking on a job opens a the Job Quick View, providing all the information you need at a glance, including job timings, engineer details and any other relevant data.



- Click the **Favourite** icon to mark the job as a favourite.
- Click **View Job** to open the job in a new tab, so you can keep your current page open.
- Click **Create Schedule** to open a pop-up where you can enter schedule details. Once you press **Create**, the schedule will be added and appear in Workshop Scheduler.
- If a job has an assigned engineer, the Quick View shows their details. Any future schedules for the job, including dates and times, are also displayed.

5.2 Favourite Jobs

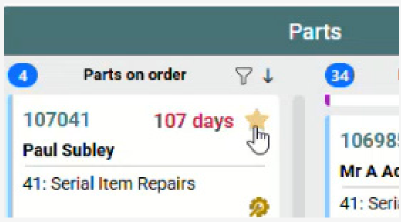
Jobs can be marked as favourites to be easily accessed again when filtering jobs. To favourite a job:

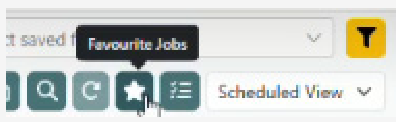
1.Click the **Star** icon on the job card.

2. The icon will turn Gold to show the job has been favourited. 

3. To remove a favourite, click the **gold Star** again.

4. Navigate to Workshop Scheduler and select **Favourite Jobs** to view the list of favourited jobs. Alternatively, when filtering jobs on a board, select **Favourite Jobs** to display only favourited jobs.





Did you know?

- You can favourite jobs directly from the Job Quick View and they will automatically sync with Scheduler.
- Unfavouriting a job in Scheduler will also remove it from your WIP boards, keeping everything up to date.

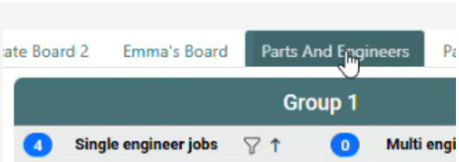
6. VIEWING AND NAVIGATING BOARDS

6.1 Switching Between Boards

Boards can be switched quickly using the board navigation bar.

1. Select a different board from the Tabs list.

2. The board view will update to display the selected board.

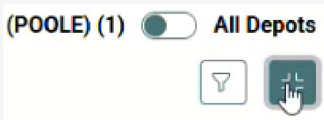


6.2 Full View Mode

Full View Mode allows boards to be displayed on large screens and is ideal for displaying live workshop progress on wallboards. To enable Full View Mode:

1. Click the Full View button to expand the board and fill the screen.

2. Click Exit Full View to return to the standard view.



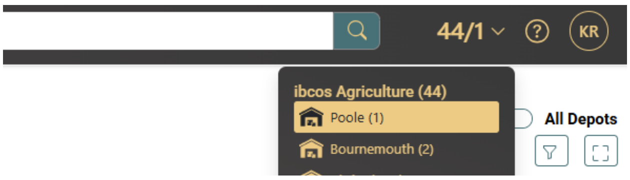
6.3 Changing Depots

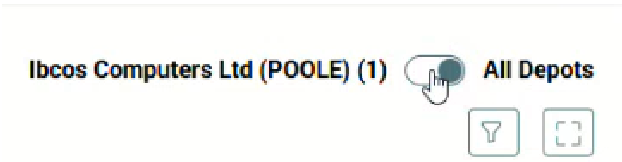
Boards can display jobs from different depots. To change depot:

1. Select the Depot dropdown menu from the top navigation bar and choose the Depot to view.

2. To view jobs across all depots, toggle the depot selection to All Depots.

3. When the depot changes, the Job Counts on the board update automatically.





6.4 Editing Criteria from Within a Board

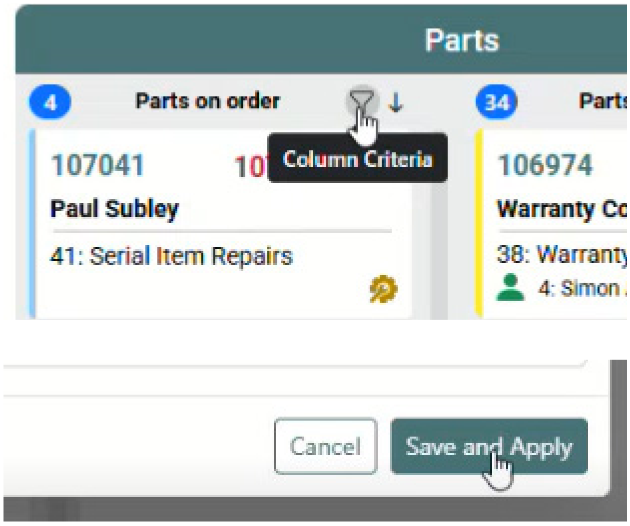
When viewing a board, the actions available depend on whether you created the board.

To permanently edit a board you created:

1. Select the **Column Criteria** icon at the top of the relevant column.

2. Update the criteria as required and select **Save and Apply**.

Changes are permanently saved to the board.

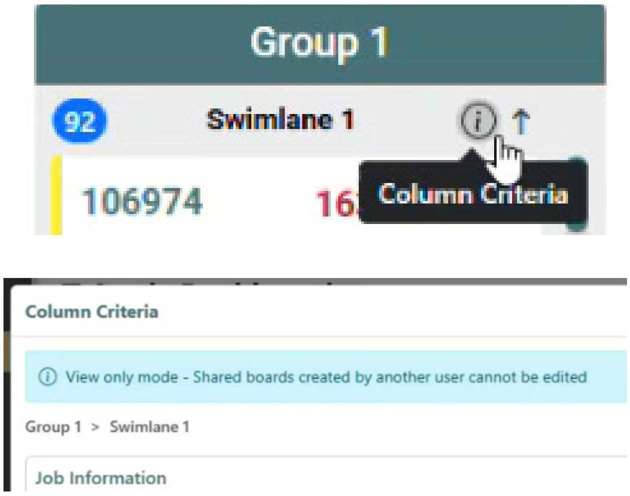


To view criteria on a board created by another user:

1. Select the **Information** icon at the top of a column.

2. Review the criteria used to build the board. Editing options are not available.

This ensures board ownership is respected while still allowing visibility into how shared boards are configured.

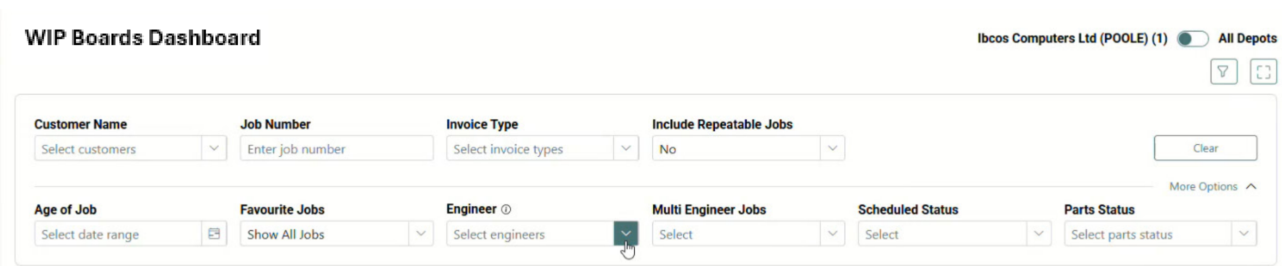


7. FILTERING JOBS

You can temporarily filter jobs on a board to quickly narrow down what is displayed based on specific criteria.

1. Open a **Board**.

2. Select the **Quick Filter** icon to open filtering options.



3. Select one or more filters, such as **Customer Name**, **Job Number**, **Invoice Type**, or **Repeatable Jobs**.

4. For additional filtering, select **More Options** and choose from criteria such as **Job Age**, **Favourite Jobs**, **Engineer**, **Multi-Engineer Jobs**, **Scheduled Status** or **Parts Status**.

5. As you apply filters, the board updates automatically to display matching jobs.

6. The **Quick Filter** icon changes appearance when filters are active and selecting **Clear** will remove all filters.

Did you know?
Filters applied through the **Quick Filter** panel are temporary. They will reset if you navigate away from the board or refresh the page.

8. USEFUL INFORMATION

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