



Queues in TimeTrak

User guide
2017

Queues in TimeTrak

A new feature of TimeTrak 4.0 is Queues.

Queues will allow users to see upcoming work organised with filters.

Queues are visible in both TimeTrak Professional and TimeTrak Mobile.

A Queue can be added to manually from a Job, Client, Serviceable Unit or Task, or it can be generated from a custom SQL script to show any Job, Client, Serviceable Unit or Task based on set criteria.

Queues have also extended the functionality of Maps within TimeTrak Professional.

Examples of Queues:

Jobs will move from one Queue to another:

Project Phase 1

Project Phase 2

Project Phase 3

Jobs allocated to a Queue from the Maps:

Location North

Location South

Location East

Jobs allocated to a Queue for a user:

Staff Person 1

Staff Person 2

Staff Person 3

Jobs that meet filtering requirements:

Jobs by Due Date by Status

Jobs by Location by Due Date

Jobs by Job Manager by Due Date by extra field

Jobs by extra fields

Profile Settings

A Queues visibility is enabled via the Profile settings.

Go into the TimeTrak Admin Console

Profile Menu

Then to the Queues Tab within the Profile.

These can be ordered specifically for each Profile.

For Mobile Users they can optionally have the ability to Add Time, Add Materials to or see the details of the Queued item

The screenshot shows the 'Profile' window in the TimeTrak Admin Console, specifically the 'Queues' tab. The window title is 'Profile'. At the top, there is a 'Name:' field with the value 'Another Profile'. Below this is a horizontal menu with tabs: TimeTrak, Config, Alerts, MYOB Exo, Post & Invoice, Check In, Knowledge Base, Form Layout, Customisations, Checklists, Users, and Queues (which is selected). The main content area has a section titled 'Enable Queues' with a checked checkbox. Below this, there is a list of items with checkboxes: 'Jobs Due Tomorrow' (checked), 'Current Jobs' (unchecked), and 'Western Suburbs Run' (unchecked). At the bottom left of the main area are 'Move Up' and 'Move Down' buttons. At the bottom right, there is a 'Mobile Settings' section with three checked checkboxes: 'Show Add Time Entry', 'Show Add Material', and 'Show Details'. At the very bottom right are 'Ok' and 'Cancel' buttons.

Customising information in the Queues

Within the Profile, go to the Customisations Tab.

Against each item, there is the option to customise the fields visible for users in each key place this information would show.

(Maps, Queues, Tooltips, Pins)

Profile

Name: Another Profile

TimeTrak | Config | Alerts | MYOB Exo | Post & Invoice | Check In | Knowledge Base | Form Layout | Customisations | Checklists | Users | Queues

☒ Use Layout Customisation

Row 1: JobNo Job Title
 Row 2: |
 Row 3: AccNo
 Row 4: Client
 Client Address
 JobNo
 Job Title
 Job Quote Date
 Job Due Date

Preview

JobNo: ☐ Job Quote Date
Job Due Date

Setting

Appointment
 Appointment Map List
 Appointment Map Tooltip
 Appointment Map Pin
 Calendar
 Professional Calendar Tooltip
 Mobile Calendar Layout
 Client
 Client Map List
 Client Queue List
 Client Map Tooltip
 Client Map Pin
 Form Fields
 Mobile Serviceable Unit Dropdown Layout
 Job
 Job Map List
 Job Queue List
 Job Map Tooltip
 Job Map Pin
 Serviceable Unit
 Serviceable Unit Map List
 Serviceable Unit Queue List
 Serviceable Unit Map Tooltip
 Serviceable Unit Map Pin
 Task
 Task Map List
 Task Queue List
 Task Map Tooltip
 Task Map Pin
 Timeline View
 Timeline View

Enable Customisation

Assign Fields
Use the Space bar to produce the drop down list with options available,

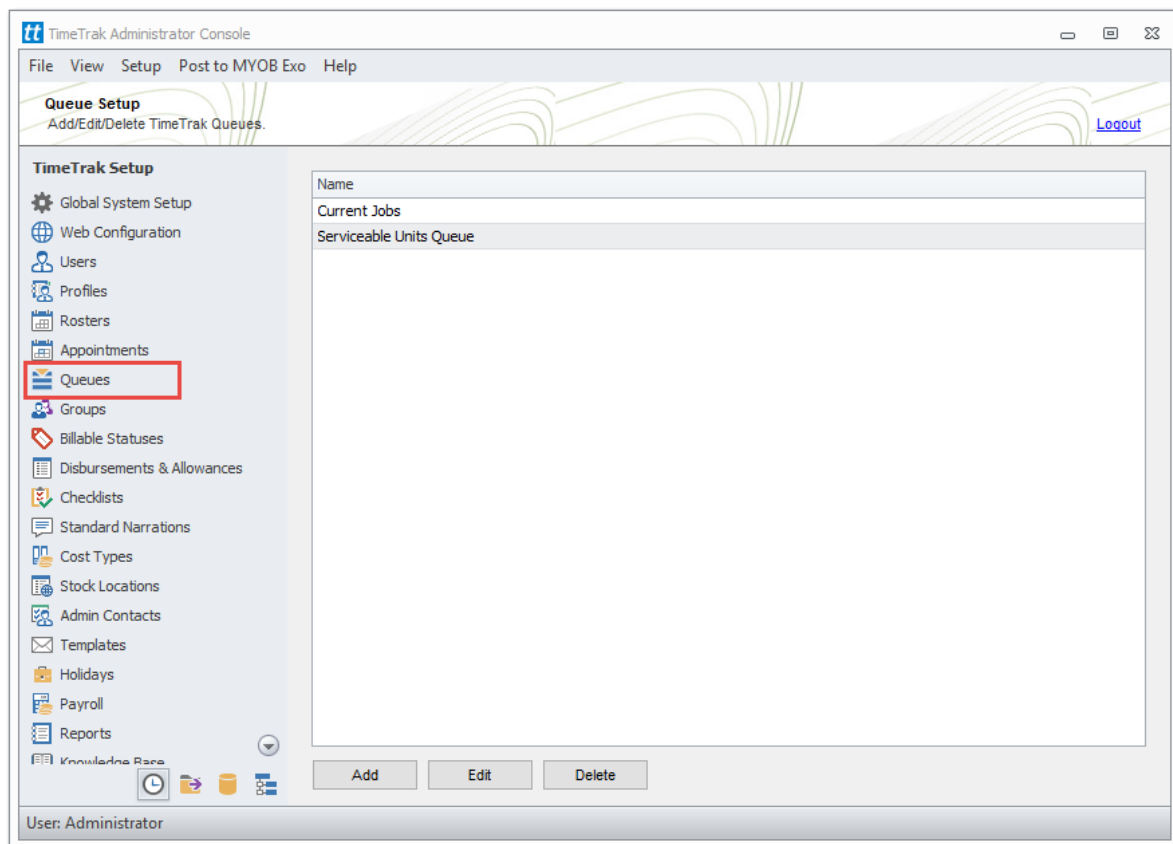
Ok Cancel

Creating a Queue

A Queue can be basic, where users manually assign items to the queue, or the Queue can get complex with custom SQL scripts narrowing down the list and allowing it to be rerun by the users, repopulating on refresh.

Queues can also control some behaviours of the Jobs or Tasks.

In the TimeTrak Admin Console
Go to the Queues Menu



Click on Add to create a new Queue.

Queue Screen

The screenshot shows the 'Queue' configuration window. Callouts on the right side point to the following fields:

- Queue Name**: Points to the 'Name' field containing 'Western Suburbs Run'.
- Item Limit**: Points to the 'Item Limit' field containing '0'.
- Colour**: Points to the 'Colour' field showing a blue color swatch and the text '84, 141, 212'.
- Map Location**: Points to the 'Set Map Location' button.
- Updates on Appointment Creation**: Points to the 'Updates on Appointment creation' section.
- Appointment Creation/Check in Behaviour**: Points to the 'Appointment Creation/Check In Behaviour' section.
- Updates on Appointment To Time Entry creation**: Points to the 'Updates on Appointment to Time Entry creation' section.
- Clear Existing Queue Items**: Points to the 'Clear Existing Queue Items' checkbox.
- Auto Populate**: Points to the 'Auto Populate' dropdown menu.
- SQL**: Points to the 'Populate SQL' text area.

The 'Queue' window contains the following sections:

- Name:** Western Suburbs Run
- Item Limit:** 0
- Colour:** 84, 141, 212
- Set Map Location** button
- Updates on Appointment creation:**
 - Jobs:** Job Status (Don't Update), Job Category (Don't Update), Job Manager (Don't Update), Appointment Status (Don't Update), Appointment Category (Don't Update).
 - Tasks:** Task Status (Don't Update), Task User (Don't Update), Appointment Status (Don't Update), Appointment Category (Don't Update).
- Appointment Creation/Check In Behaviour:**
 - Queue Duration: Use Default Time Unit
 - Queue Scheduling Columns: Estimated Time and Remaining Time
 - ☐ Remove Items After Scheduled
- Updates on Appointment to Time Entry creation:**
 - Move Queue Item to Queue: Don't Move
- Populate SQL Name:** (empty field)
- Populate SQL:**

```
SELECT TOP 50 J.JobNo, 5
FROM JobCost_Hdr J
LEFT OUTER JOIN Dr_Accs A ON A.AccNo = J.AccNo
LEFT OUTER JOIN Job_Status S ON S.StatusKey = J.Status
WHERE J.IsActive = 'Y'
AND (S.Admin_Stat IS NULL OR S.Admin_Stat <> 'Y')
AND S.IsActive = 'Y'
AND J.X_TT_JobTemplate = 'N'
AND J.X_TT_QuoteTemplate = 'N'
AND J.DueDate BETWEEN <ThisWeekStart> AND <ThisWeekEnd>
AND J.JobNo NOT IN <JobQueueItems>
ORDER BY J.JobNo
```
- Auto Populate:** Disabled
- Clear Existing Queue Items:** ☐
- Buttons:** Preview, Use Example, Ok, Cancel.

Queue Name

Enter in a meaningful name for the Queue - it is what both the TimeTrak Professional and Mobile users will see.

Item Limit

If there is likely to be many records in the list, then setting an item limit can make sure the queue is still quick to load with the most relevant information.

Colour

Set a Queue Colour, as it will help identify one Queue from the next in screens.

Map Location

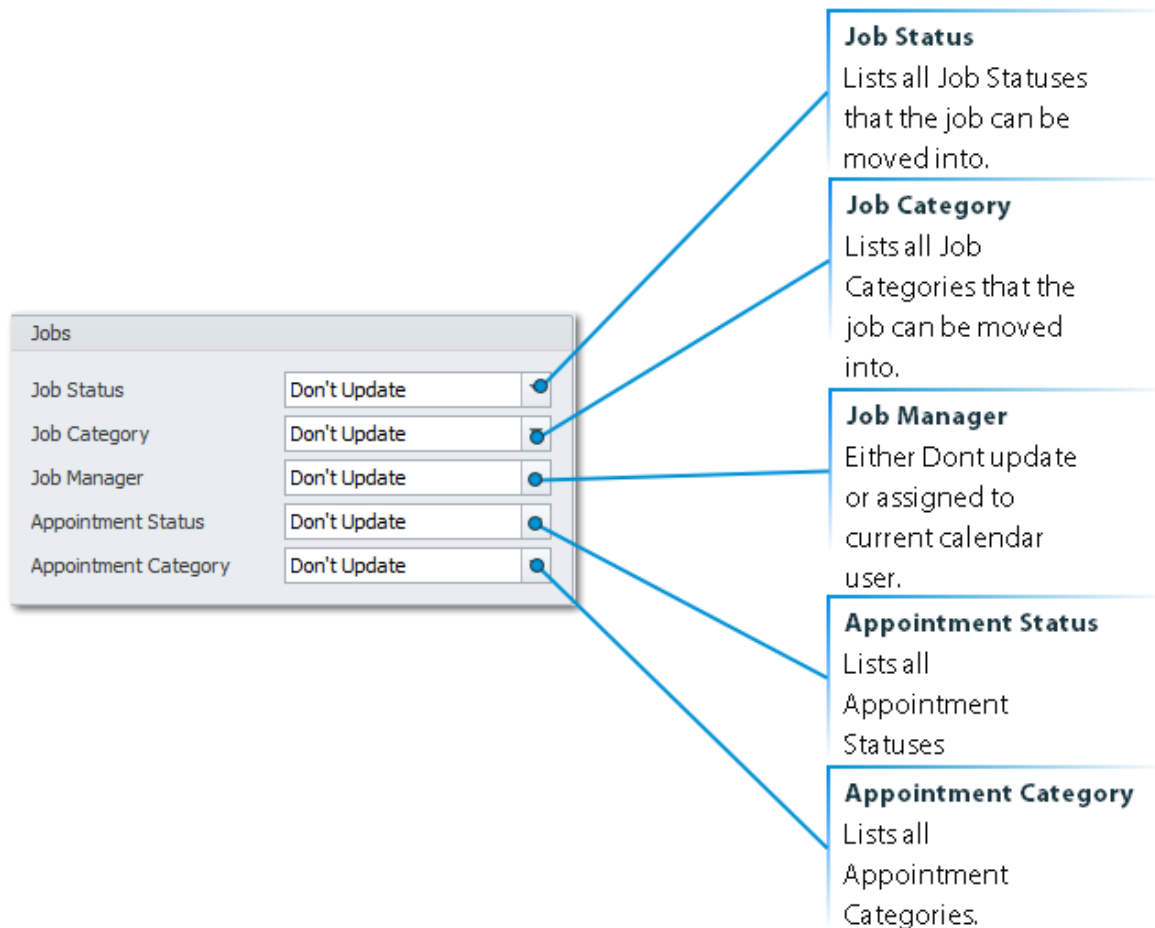
If the Queue is location based then you can set a Map Location against the queue and it will show in the Maps with that location as home base.

This is helpful for different branches or remote teams.

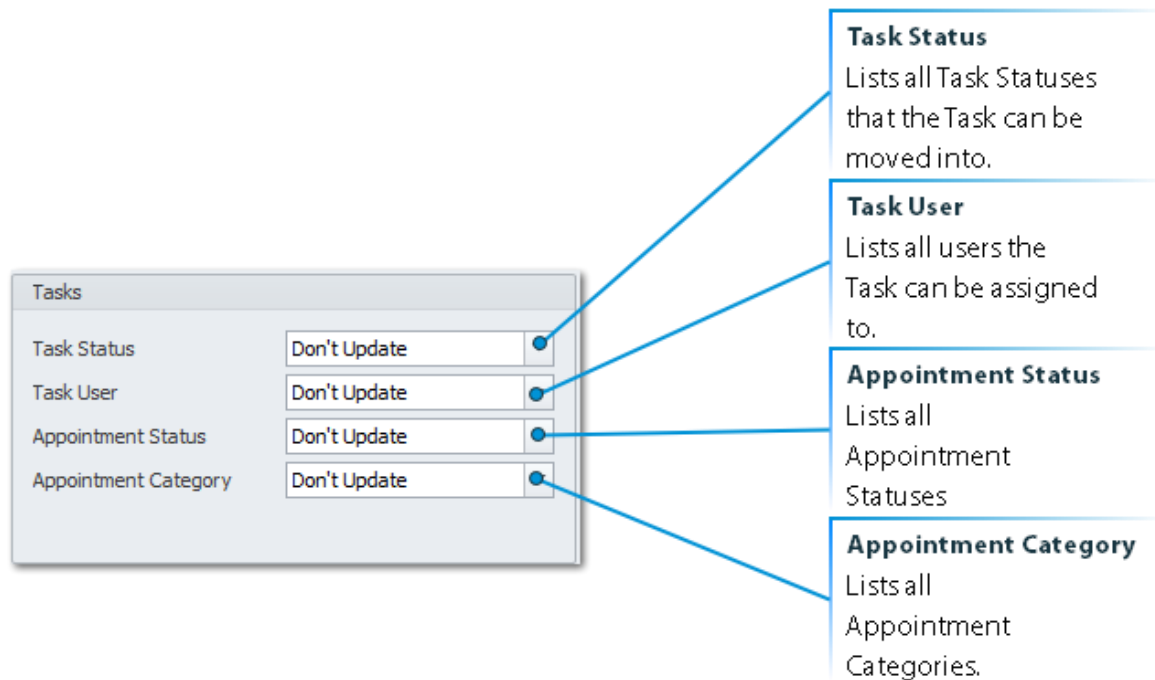
Updates on Appointment Creation

When an appointment is created from the Queue then TimeTrak can automatically update settings on the Job, Task or Appointment.

Jobs:



Tasks:



Appointment Creation/Check in Behaviour

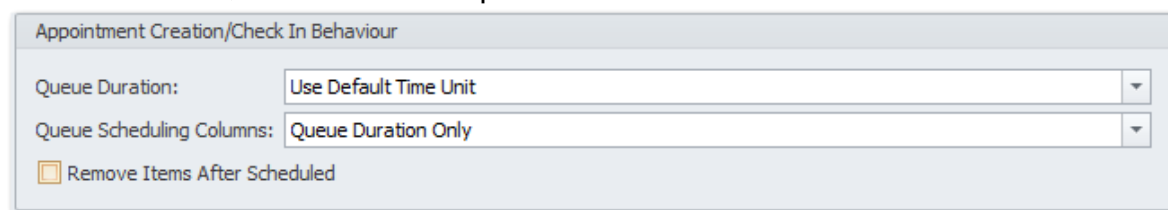
Queue Duration:

Because many appointments can be created at once from the Queue Items, there are two methods on saving the appointment's duration.

It can pick up the user's time units value and create all appointment's at that value.

or it can be set per Queue - this is to cater for different types of work, some which might take longer than others.

Select from the Queue Duration drop down



Queue Scheduling Columns:

In the Queue itself, users can see the total for the duration of the Queue and its items, the estimated time of each item, the remaining time of each item, or the estimated and remaining columns.

- Estimated time from a Job is the total of the Quoted lines set to copy to 'T'
- Estimated time from a Task is the estimated value saved on the Task.
- Remaining time on the Job is the Estimated time minus the actual time in the Timesheets tab in MYOB Job Costing and any time entered against the job in TimeTrak.

- Remaining time on the Task is the Estimated time minus the time already assigned to the task.

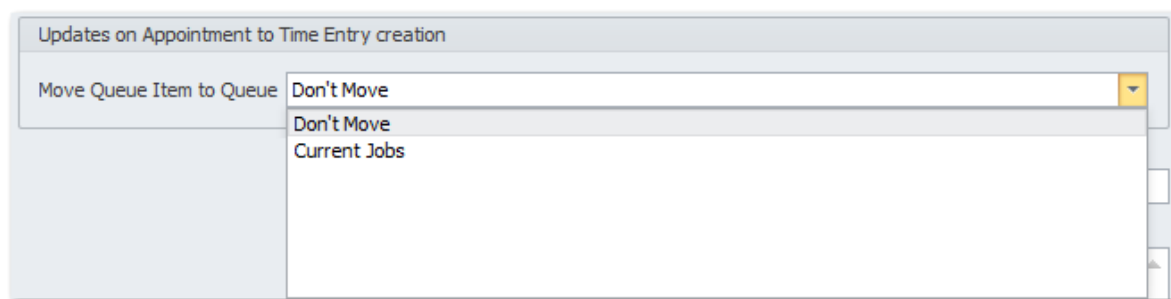
Remove Items after scheduled:

This setting will cause the Queue to diminish in size as each Queue item is converted into an appointment.

Updates on Appointment To Time Entry creation

When a Queue item is converted into an appointment, that Job, Serviceable Unit, Task, or Client can then be moved into another Queue.

This is ideal for situations when a job would be worked through different stages.




SQL

Give the SQL Query a Name.

TimeTrak expects the first column to be a LinkID (this will be the Jobno, Accno, TaskID, Seqno from SU_MAIN), and the second column to be the LinkType.

LinkTypes are:

- 1 - Clients
- 5 - Jobs
- 6 - Serviceable Units
- 7 - Tasks

Hover over the  icon to see more hints.
There is an example of SQL code, which can then be modified if required.

Populate SQL Name:
SU Queue

Populate SQL: ?

```
select TOP 50 S.SEQNO, 6
FROM SU_MAIN as S
INNER JOIN Jobcost_HDR J ON S.X_TT_DefaultJobNo = J.JOBNO
Where J.ISACTIVE = 'Y'
AND S.ISACTIVE = 'Y'
```

Preview Use Example

Click Preview to see the basic columns of information that will pull through.

- **Auto Populate**

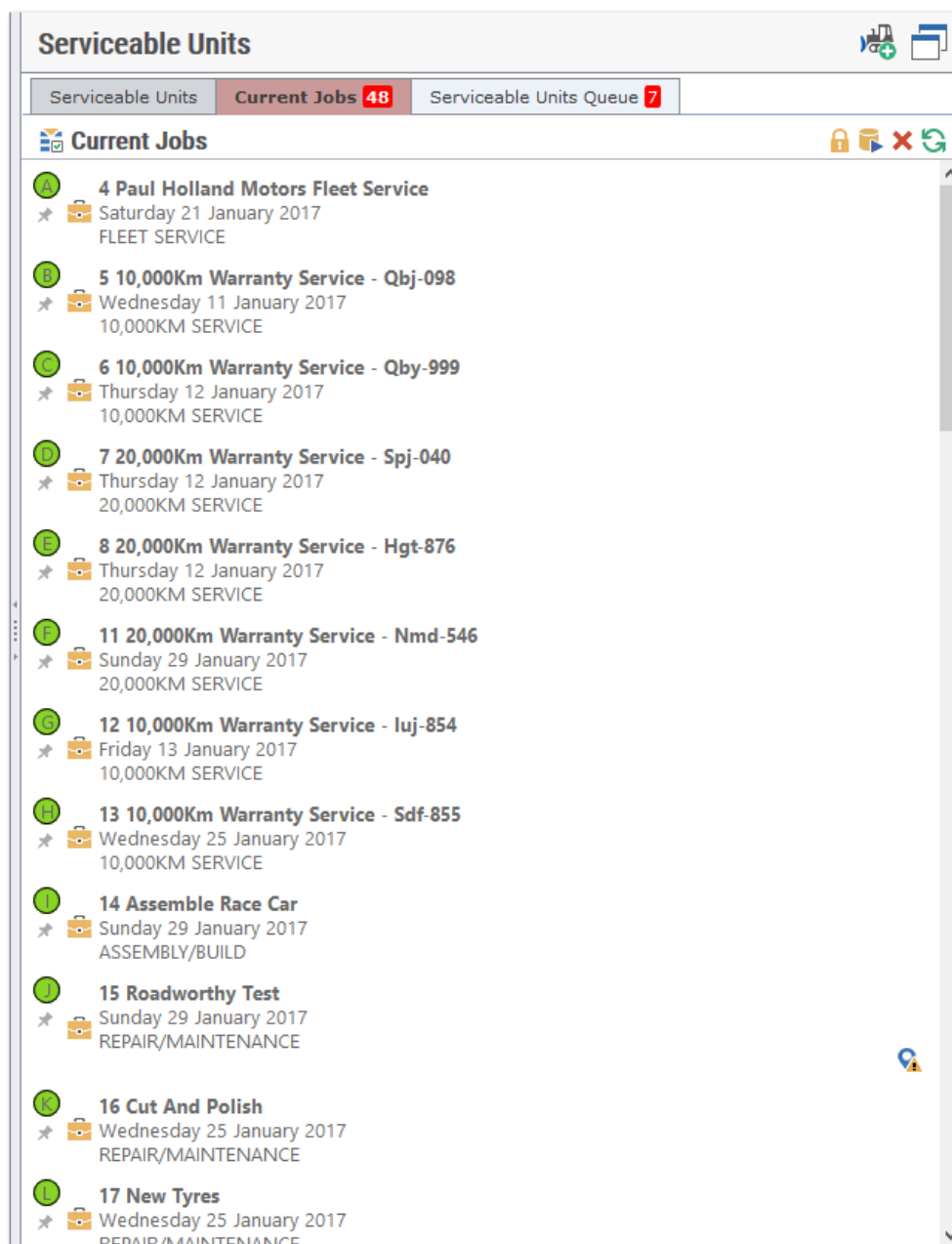
The queue can run a SQL query for a set period of time and update the queue with the new results of the SQL Query.

- **Clear Existing Queue Items**

When the Queue is refreshed then it will clear the list of items from the Queue, this is used in conjunction with the Auto Populate feature.

TimeTrak Professional Queues

Against the Clients, Jobs, Tasks and Serviceable unit's panels in TimeTrak Professional, Queues will show depending on the Users Profile settings.



IMPORTANT

If a Serviceable Unit or Client is going to be added to a Queue, they will need to have a Default Job assigned to them so they can be assigned.

The underlying understanding is that the time will end up on a job.

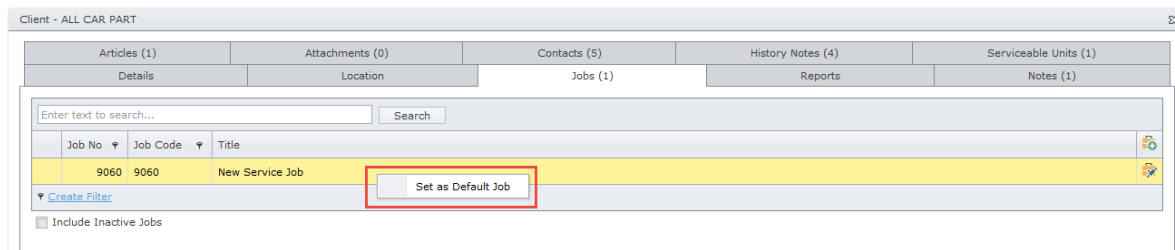
To assign the default job to a Client or Serviceable Unit, go into the item.

Go the Jobs Tab

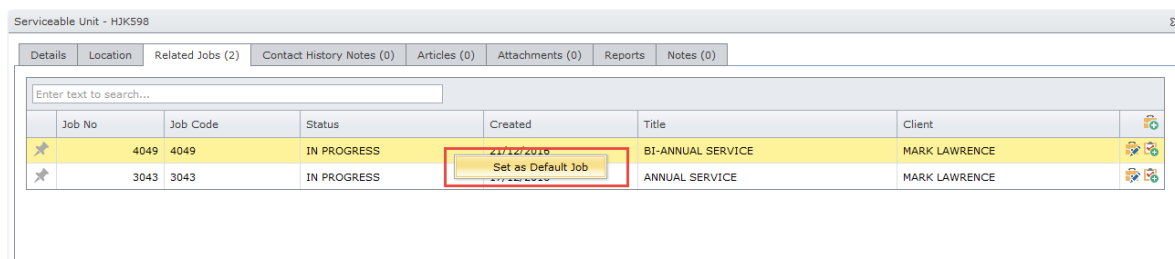
Right click on the Job, which is to be the default job.

Set as Default Job

Client:

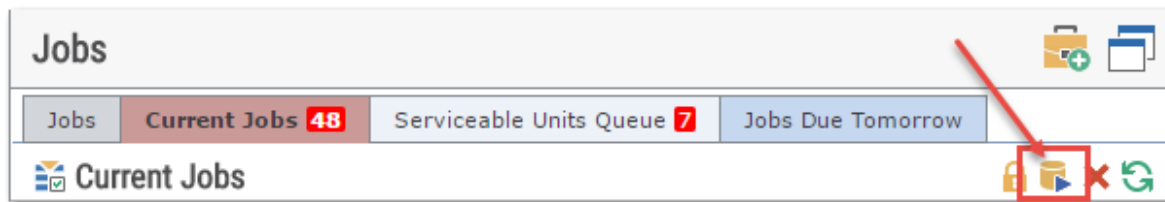


Serviceable Unit:



Adding Items to a Queue

A Queue can be generated from the SQL it might have embedded into it.
If there is a SQL Query to be run then the database icon will be visible on the Queue.

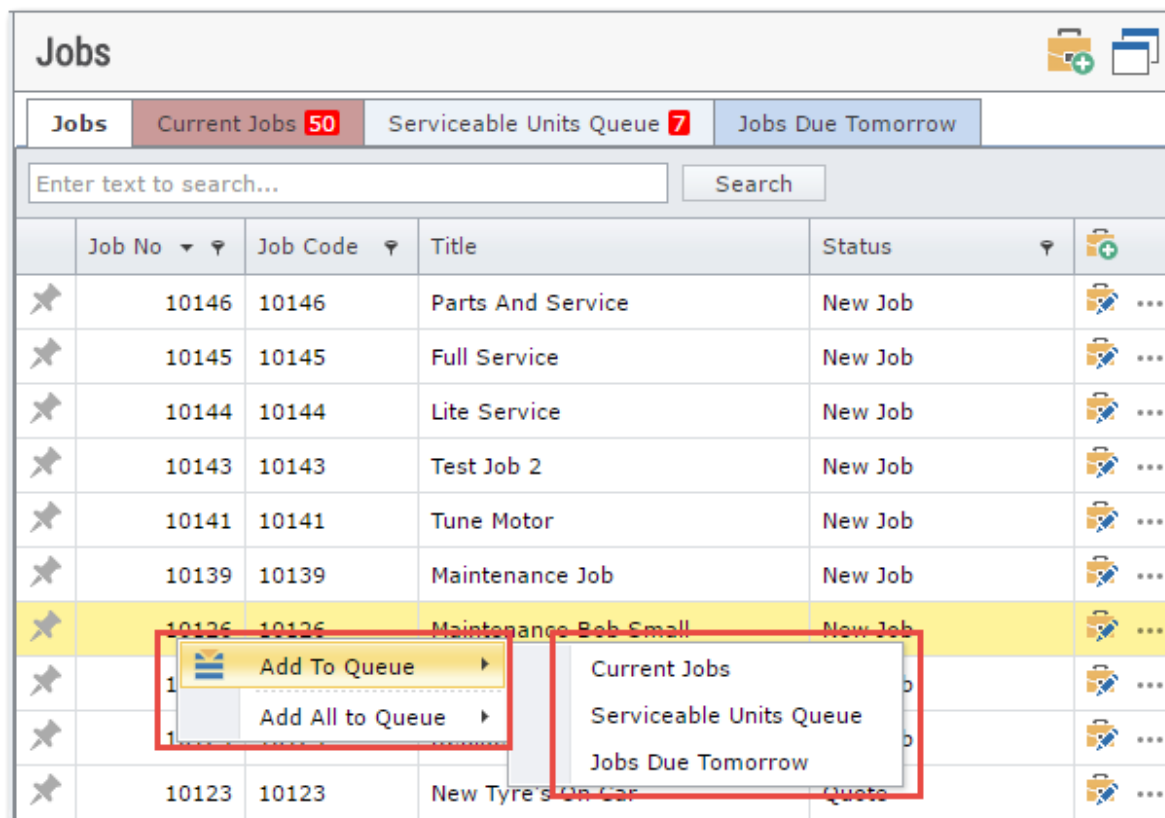


Click on the Database Icon to reload the data in the Queue.

If the Queue does not have a SQL query behind it, items will be manually assigned to it by the Service Coordinator.

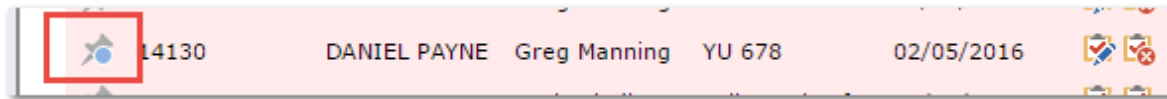
This can be done via the Jobs, Clients, Serviceable Units or Tasks Panels.

Right click on the selected item and assign it to the required Queue.

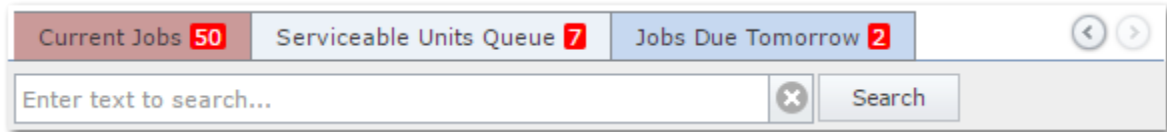


A Queue can be a combination of Jobs, Tasks, Serviceable Units and Clients.

As the items are added to a Queue, the item itself will get a dot on the Pin icon with the colour of the Queue.



And the Count on the Queues will increase.



The last item on the Queue will show with a Red icon

Current Jobs **50** Serviceable Units Queue **7** Jobs Due Tomorrow **2**

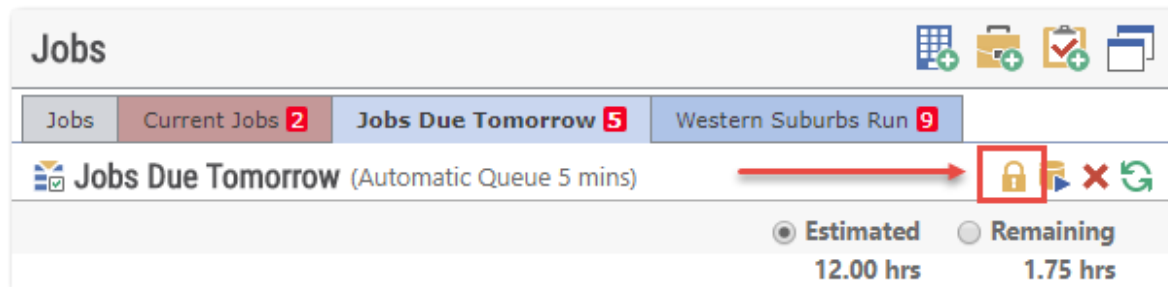
Serviceable Units Queue

Duration
1.75 hrs

A	KIAHATCHBACKYU789 KIA HATCHBACK YU789 10076 Maintenance For Unit	0.25 hrs	
B	HYU 908 HYU 908 42 Paint Car Mary-Anne Gilby	0.25 hrs	
C	New Serviceable Unit New Serviceable Unit 10080 New Job	0.25 hrs	
D	FLOOFTER FLOOFTER SERVICEABLE UNIT 10125 Special May Deal Emmas House Of Lurve	0.25 hrs	
E	360HEALTH 360 Health unit 10082 New Maintenance Job For 360 Health 360 Health	0.25 hrs	
F	JASMINESUMAIN Main SU FOR JASMINE 10118 Jasmine Wed Job Jasmine Graham	0.25 hrs	
G	HAR-TDT HARRISON UNIT 10117 Wednesdays Job	0.25 hrs	

A red box highlights the 'G' icon and the 'HAR-TDT' job entry, with a red arrow pointing to it from the left.

To reorder the list of Jobs in a Queue click on the padlock icon to unlock the ordering and drag and drop the Queue items into the order required before scheduling.



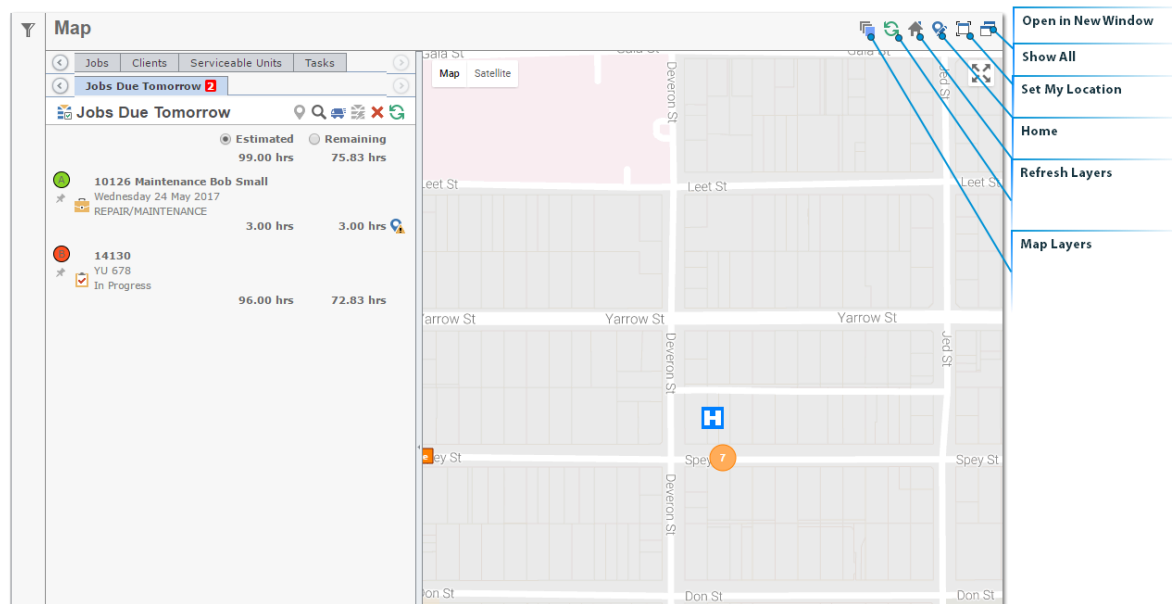
Queues in Maps

TimeTrak Professional Maps now have the Queues functionality.

This will allow Service Coordinators to schedule users based on the locations saved against the jobs.

With this feature organising a Mobile User's appointments for the day will ensure they spend less time travelling and more time on jobs.

Open the Map in TimeTrak Professional.



[Open in New Window](#)

Click on this to open the maps in another browser window.

[Show All](#)

Click on this to show all appointments or Queue items on the map

- [Set My Location](#)

This will open another map screen and allow a user to set their own location, great when users work from different locations.

- [Home](#)

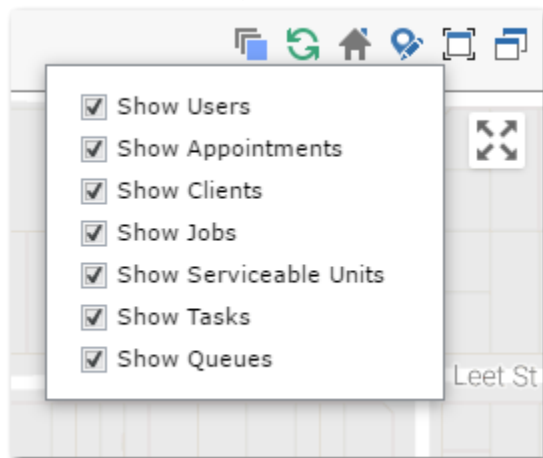
Click this button to return the map to the Home Location.

- [Refresh Layers](#)

Refresh the layers on the Map

- [Map Layers](#)

Select from the Layers options what is visible in the panel of the Maps



Each item displays differently in the map

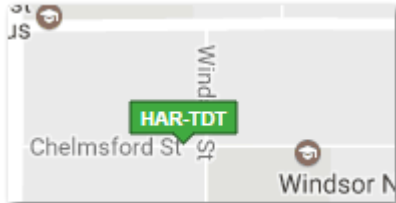
Job:



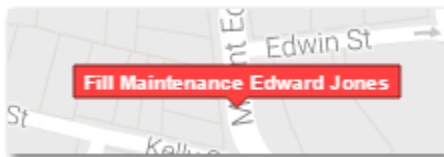
Client:



Serviceable Unit:



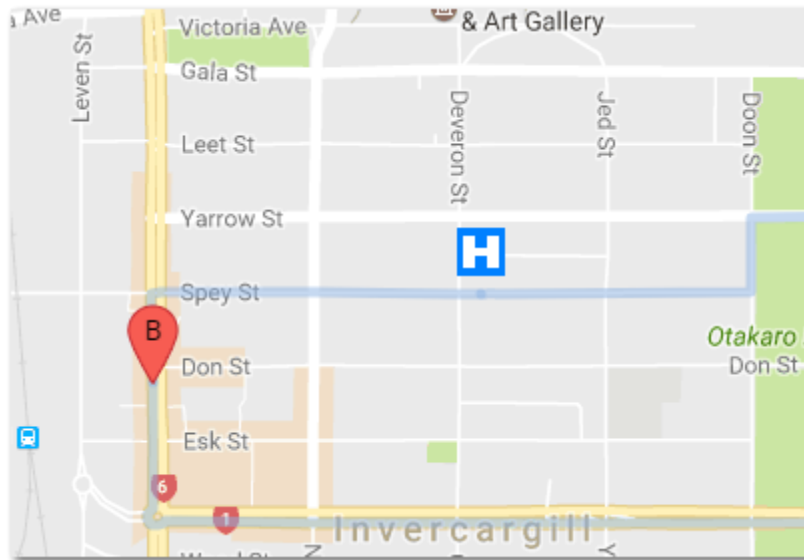
Tasks:



Appointments:

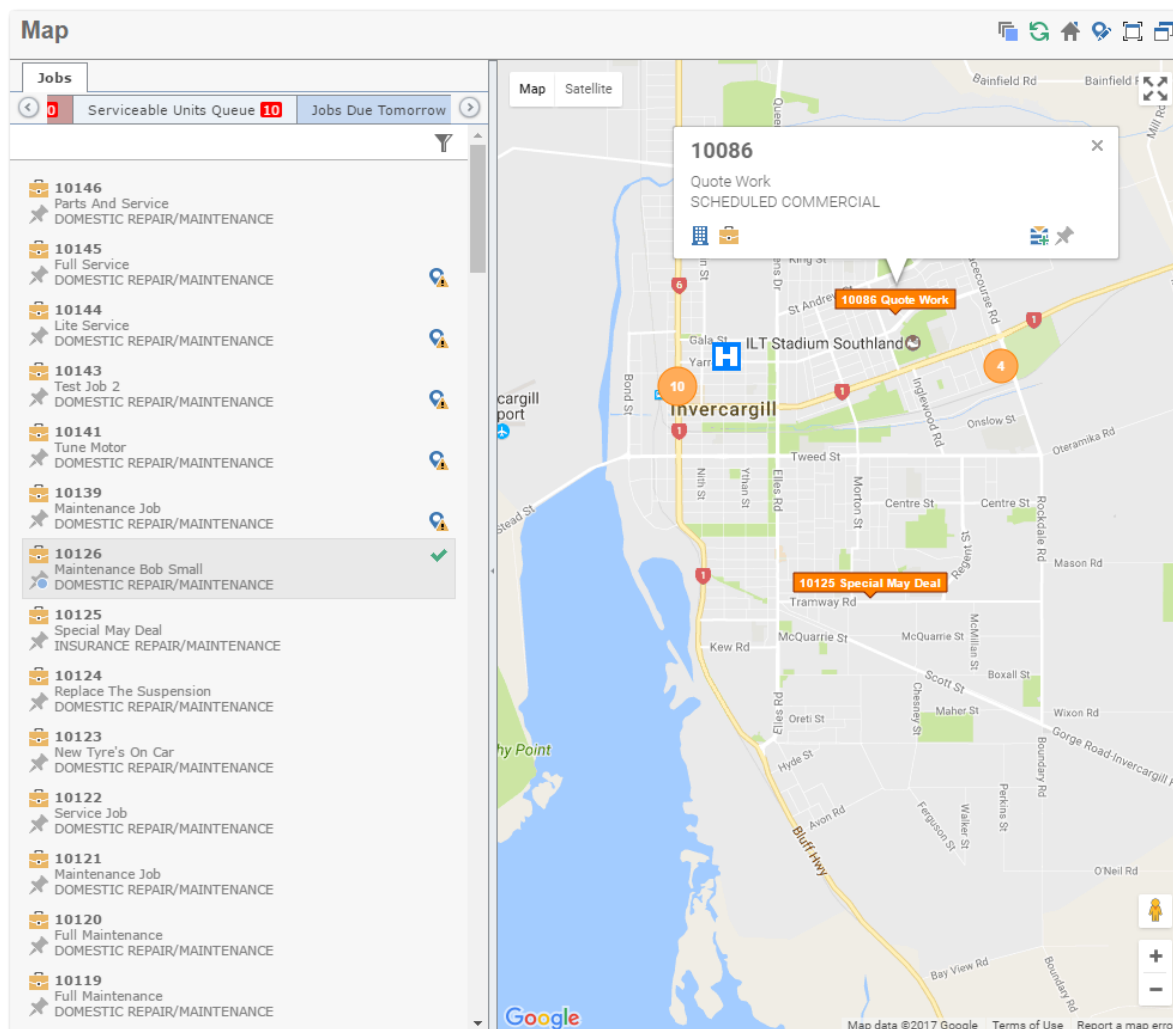


Queues:

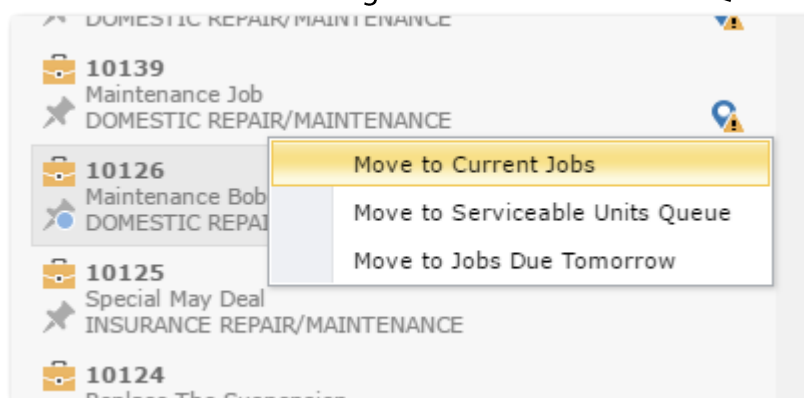


Add an Item from the Map to a Queue

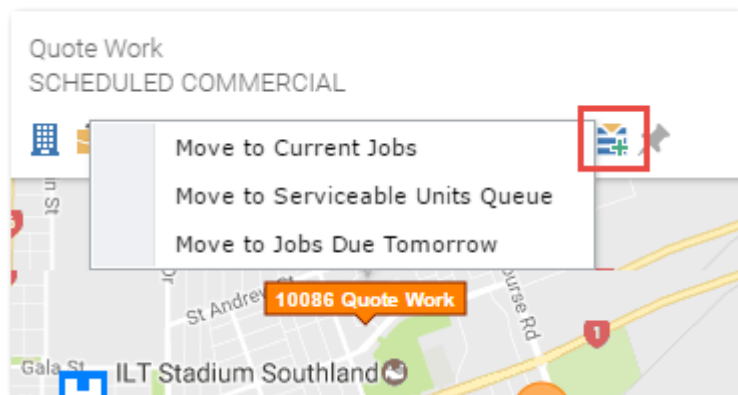
Select from the layers what items need to show on the maps.
Right click on an item and select the option to add to a Queue.



From the list the user can right click and select which Queue the item should be assigned to.



From the Map the item can be selected, click on the Queue icon to select the correct Queue to assign the item to.



Utilising a Queue

	Estimated	Remaining
15178 Test Attachment Add Not Started	148.00 hrs	122.83 hrs
14130 YU 678 In Progress	48.00 hrs	47.75 hrs
HOLDENUTERT789 HOLDEN UTE RT789 1041 Finance	96.00 hrs	72.08 hrs
15173 need a single task with a populated discription Not Started	0.50 hrs	0.50 hrs
10126 Maintenance Bob Small Wednesday 24 May 2017 REPAIR/MAINTENANCE	3.00 hrs	2.00 hrs

Refresh Queue

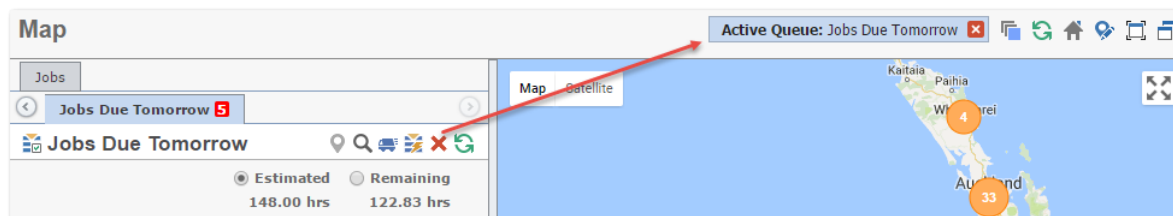
Click this to reload the Queue.

Delete Items

Click Delete Items to clear all of the items out of the Queue.

[Toggle Queue Quick Add](#)

When this setting is enabled it will save the Queue to the header of the map and all selected items in the map will be assigned to that saved Queue.



[Optimise Route](#)

Click on Optimise Route to plan a route in the map down the list of Queue items in the map.

[Zoom to Route](#)

Click to zoom into the Optimised Route on the map

[Show/Hide Route](#)

Select this setting to either show or hide the route.

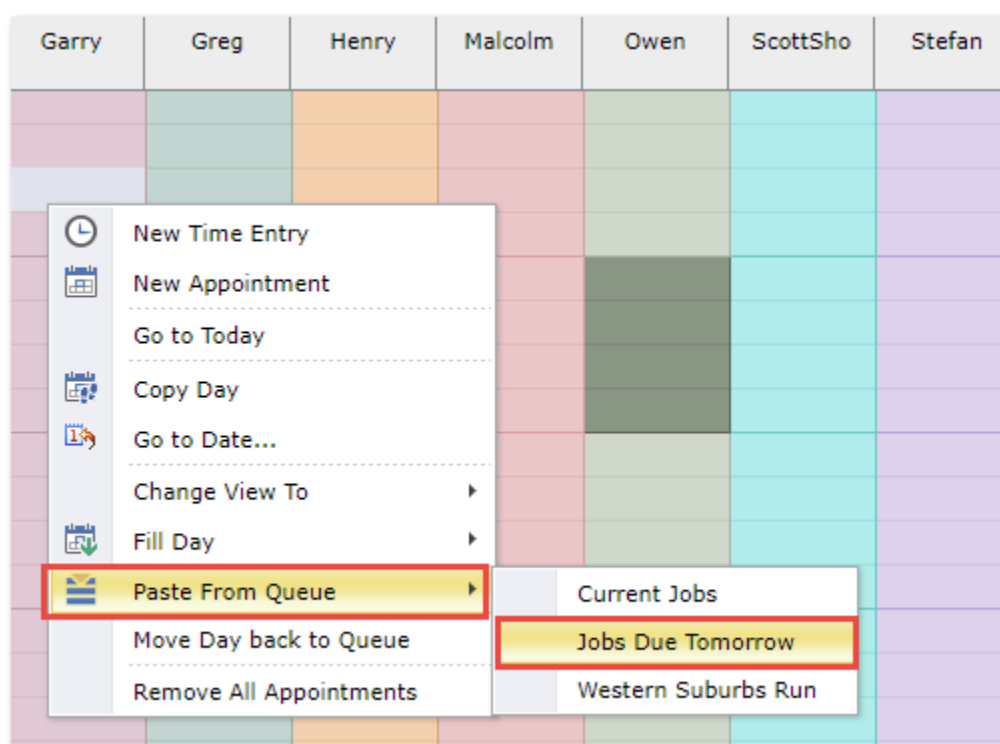
Scheduling from a Queue

A Queue's items can be scheduled in bulk against a single user.

For example if a Queue was set up to contain a person's workload for the day, based on the location of the jobs then the Scheduler can select time in another users calendar and paste from a Queue.

Fill a Day

Right click on a user's calendar without selecting a period and select Paste from Queue. Select the correct Queue



This will fill the selected users day with as many Appointments it can based on the users time units and Queue Appointment durations.

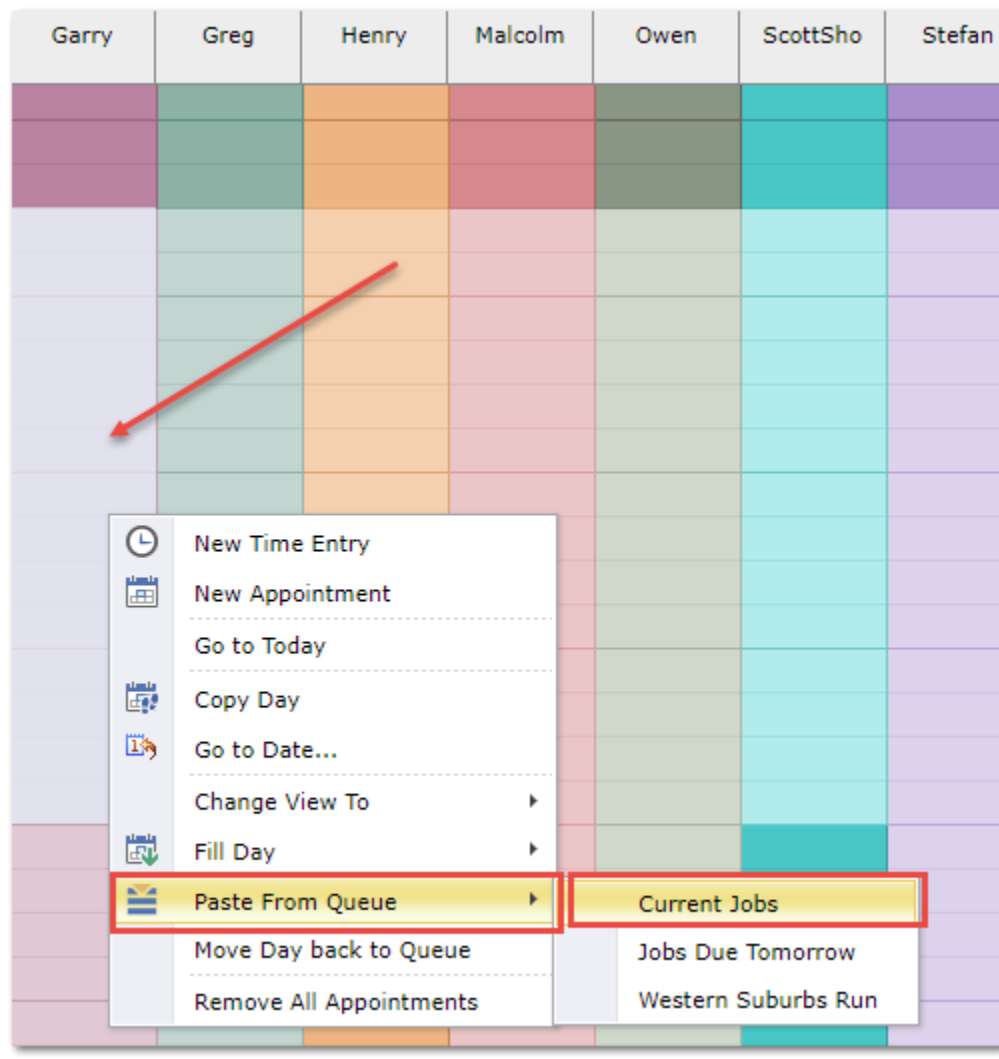
	Bridget	Bruce	Charlott	Craig	Garry
09 00					67 Chelms Windsor Id
15					
30					
45					
10 00					
15					
30					
45					
11 00					
15					
30					! 38 - H
45					10146 - P 28 Sawmi
12 00					
15					
30					
45					
13 00					
15					
30					
45					
14 00					
15					
30					
45					! 58 - M
15 00		! 15 - T			10126 - M Bob Small 56 Dee St Invercargi
15		6050 - Se 59 Princes			
30					
45					
16 00					
15					
30					
45					

Fill part of a Day


Select a period on a User's Calendar

Right click on a user's calendar without selecting a period and select Paste from Queue.

Select the correct Queue



This will fill the selected users selected period with as many Appointments it can based on the users time units and Queue Appointment durations.

	Bridget	Bruce	Charlott 	Craig	Garry	Greg
45						
08 00						
15						
30						
45						
09 00						
15						
30						
45						
10 00						
15						
30						
45						
11 00						
15						
30						
45						
12 00						

! 23 - D

8057 - Flo
Pontoon
Daniel Pay
Nugent St
Lynn Auck

! 7 - Ja

9063 - Co
Maintenan
29 WHITE
KELBURN
WELLINGT
ZEALAND

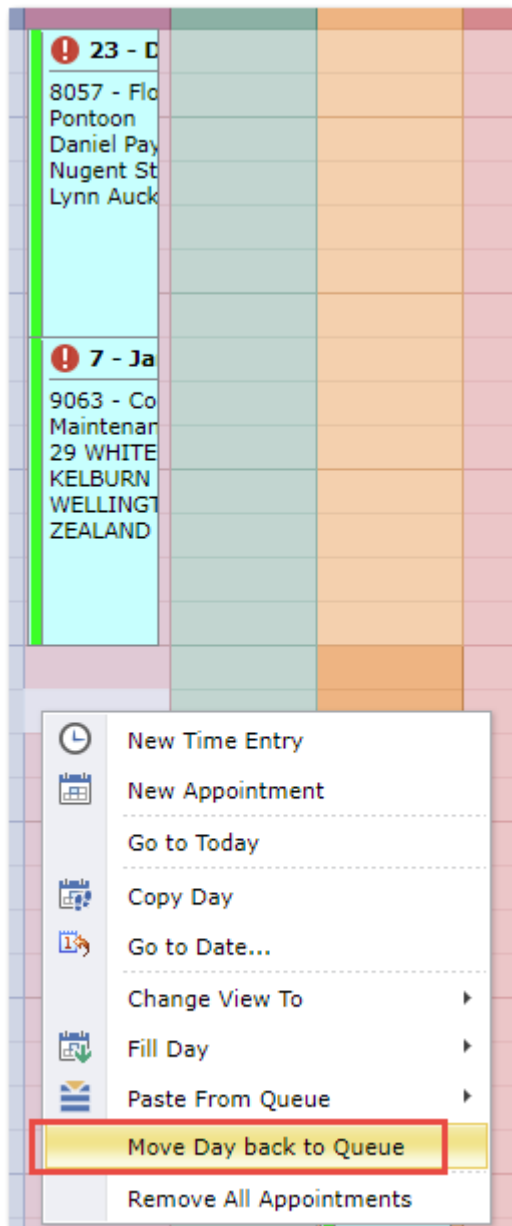
Return items to Queue

If an Appointment allocated to a user that needs to be removed from the calendar to be rescheduled it can be returned to it's Queue.

The returning options are to return each Appointment or the entire days' worth of Appointments.

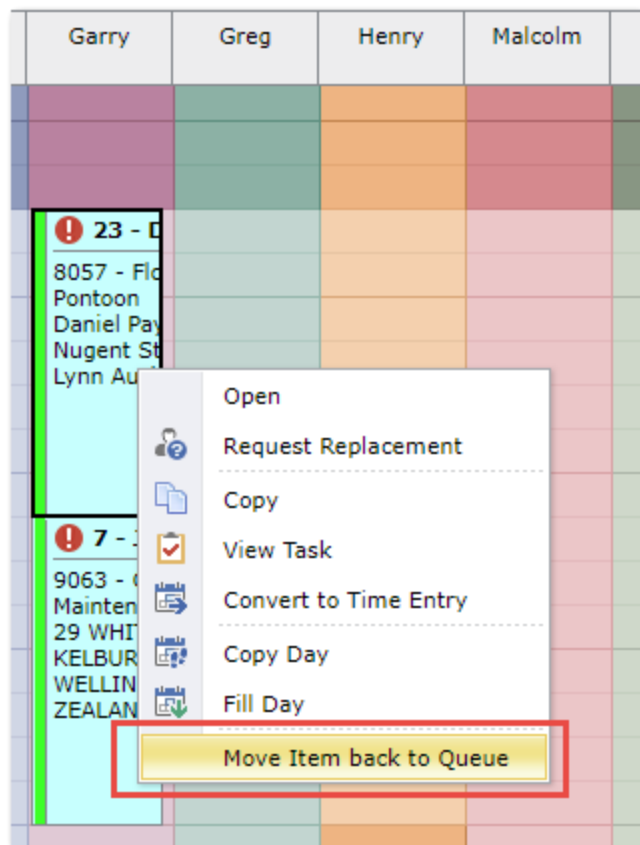
Return the day to Queue

Right click on the calendar but not on a particular Appointment
Select Move Day back to Queue



[Return Appointment to Queue](#)

Right click on a particular Appointment
Select Move Item back to Queue



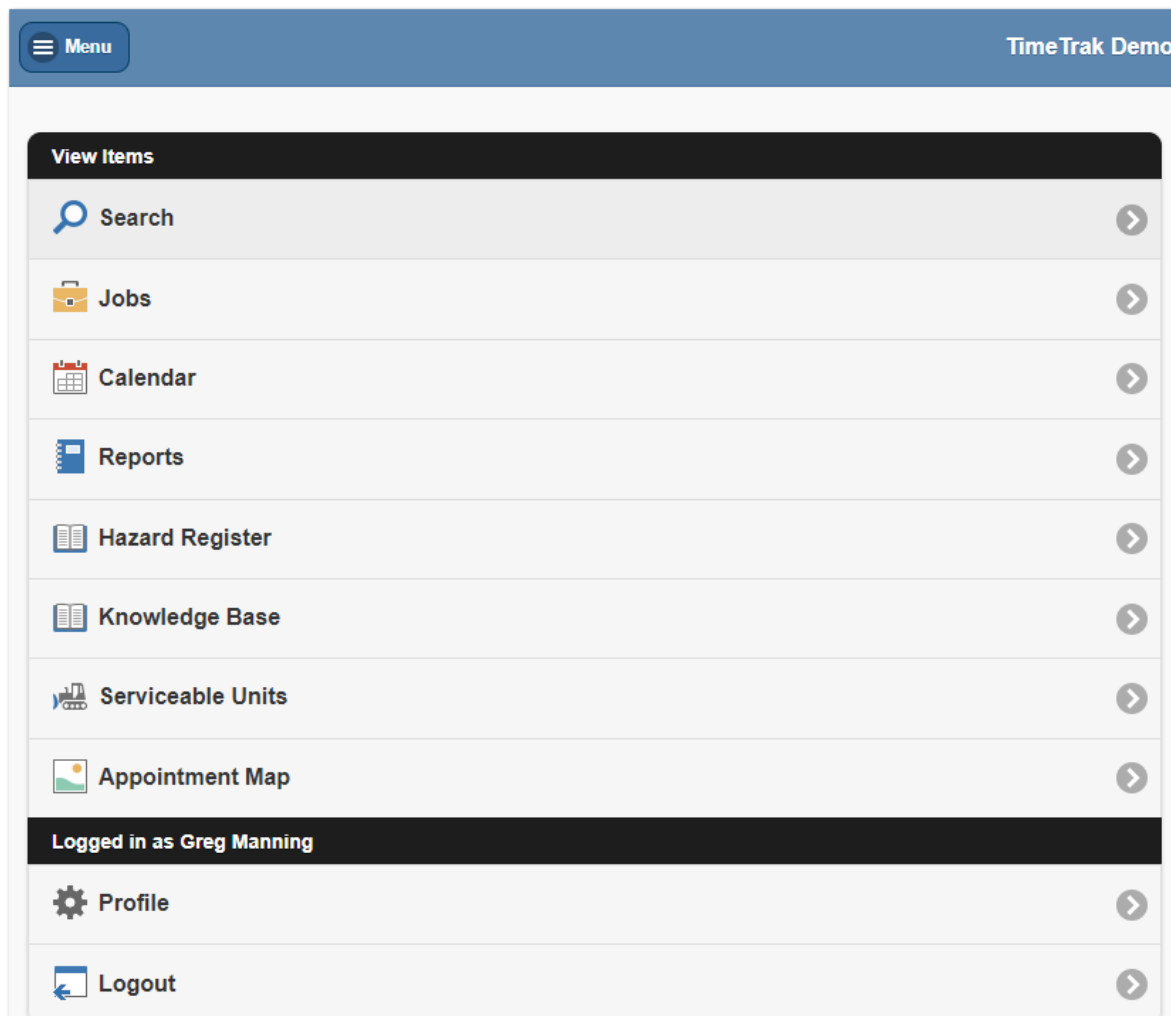
TimeTrak Mobile Queues

If Mobile users have queues enabled against their profile in the TimeTrak Admin Console, they will be able to see these queues but need to enable this against their Mobile profile at a user level.

When logged into TimeTrak Mobile, users will need to select the Profile option as per below:

Update the Profile

Click on the Profile link below



Users can tick on **Queues** and then **Return to Home Screen** if they wish to add Queues to the View Items list.

This will allow the user to view queues they have enabled against their profile in the order they are in against their profile.

Additionally, if users would like specific queue information available from the home screen this is also possible at a user level.

As per above, click on Profile when logged into Mobile.

Under Home Screen Widgets there are three queue options available as per below - select the required queues and specify where you would like the information positioned on your Mobile home screen.

My Jobs:	Hidden	0
My Tasks:	Hidden	0
Map:	Right	0
Check In:	Left	0
Queue 1:	Hidden	0
Queue 2:	Hidden	0
Queue 3:	Hidden	0

User Settings

Hidden

Top

Left

Right

Bottom

Default To My Jobs

Queues from the Home Screen

Once the visibility of the Queue is sorted then a user might see them from the home screen. Users can Start Travel or Check Into, Add Time and Materials to a queue item from the home screen, or see the Queue Items details.

There are extra permissions around adding a time entry directly to the queued item, adding disbursements or seeing the items details.

A Queue can replace Appointments if needed.

