



Workgroups in TimeTrak

User guide
2017

Workgroups in TimeTrak

Workgroups in TimeTrak 4.0 have been completely re-designed to provide better work flow for both schedulers and mobile users.

It is important to note that a TimeTrak workgroup is an association of users, contractors, subcontractors and equipment that you would like to schedule.

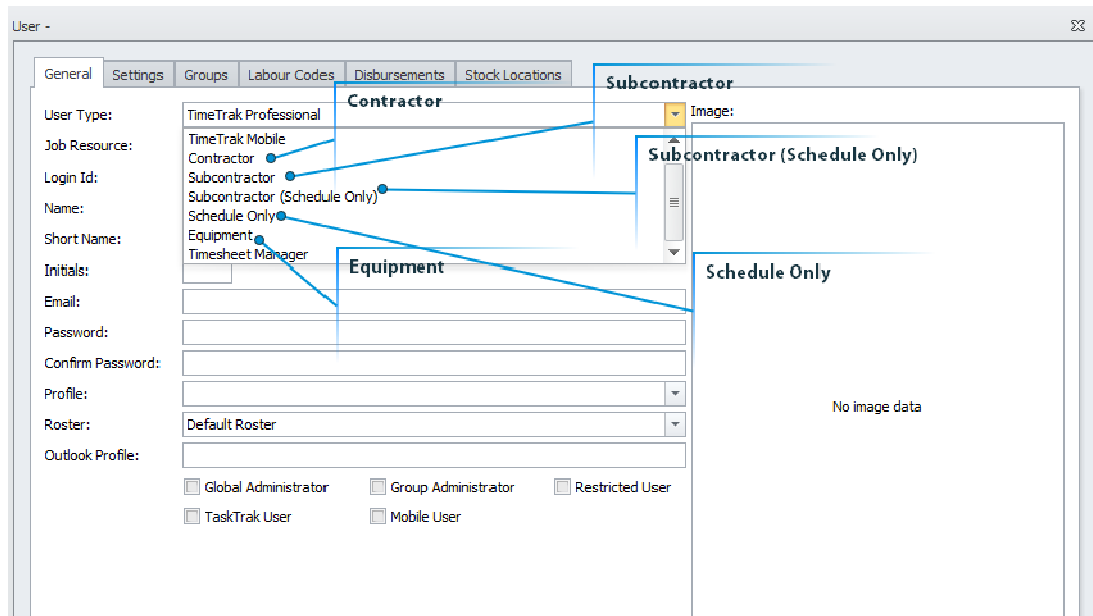
There are two main TimeTrak workgroup scheduling methods that will both be covered in this white paper.

1. When you schedule your users and equipment together in a workgroup as the users are more than likely going to use that equipment.
2. When you schedule your users in a workgroup and add on the equipment separately as they may not use that equipment.

TimeTrak mobile users can now also check users in their workgroup into different appointments, jobs or tasks if they are completing different work from the Manage Workgroups screen.

When creating a new user in TimeTrak 4, as per below there are new additional licensing types Equipment, Contractor and Subcontractor (schedule only). The Subcontractor licensing type has also had some alterations to its behavior as per below:

New User Licensing



• Contractor

A contractor is a person who regularly works with the organisation, typically they wouldn't be on the Payroll, but would be paid through creditors. They would have full access to client and job information, and log their own time against work that is assigned to them.

A Contractor will have a creditor account set up against them and each new Appointment can generate a Purchase Order against the Job or be assigned to an existing Purchase Order for the job against the Creditor Account. The time recorded by a Contractor user appears in the Timesheet section of the Job. Optionally there is a setting to determine if this time is deducted from the budgeted hours.

• Subcontractor

This is a Subcontractor who has access to TimeTrak Mobile platform only. They will have a creditor account set up against them and each new Appointment can generate a Purchase Order against the Job, or be assigned to an existing Purchase Order for the Job against the Creditor Account.

This user will only ever see Job information related to their Appointments. Quoted lines on the Job can be optionally visible where they are the Supplier against the Quoted lines. This user can complete checklists against a job. The time recorded by a Subcontractor user appears in the Costs section of the Job. Optionally there is a setting to determine if this time is deducted from the budgeted hours.

- **Subcontractor (Schedule Only)**

This is a Subcontractor who has no access to TimeTrak Professional or TimeTrak Mobile platforms at all, and can only be scheduled. They are scheduled and a Work Request can be produced for them using a custom report. They will have a Creditor Account set up against them and each new Appointment can generate a Purchase Order against the Job, or be assigned to an existing Purchase Order for the Job against the Creditor Account.

The time recorded by a Subcontractor user appears in the Costs section of the Job. Optionally there is a setting to determine if this time is deducted from the budgeted hours.

- **Schedule Only**

This is a user who cannot log into TimeTrak Professional or TimeTrak Mobile but is visible to other users who have access to both TimeTrak Professional and TimeTrak Mobile. This user is someone who is on the Payroll and works for the organisation consistently but would never have their own device or login.

An Apprentice is a good example, or members of a team who have a team leader with a device where they are all working on the same job, and the team leader enters their time for them. This license type allows a lower price point for a user that will only ever be scheduled.

- **Equipment**

Equipment licensing is for organisations that need to schedule equipment and machinery. Typically, it would be equipment that goes out with a user or a team, and there is a need to track who is using it. Or it is a piece of machinery in a factory environment that we need to capacity plan for, and optimise for production. Equipment can only be scheduled.

TimeTrak Settings

As mentioned above there are two new global settings which determine if Contractor or Subcontractor users consume labour budget against a job.

These are located in the TimeTrak Administrator Console

Global System Setup

Modify Settings

As per below:

TimeTrak Settings

General Admin Settings Email Settings Customisation Verification Attachments Support

Transactional Settings

Enable Branches on Statuses

Enable Statuses on Labour Codes

Enable Advanced Travel Features

Outlook Id Prefix:

Payment Types

Fixed Travel Billable Status: Billable

Stock Outage on Disbursement Assignment: Deny

Cost Price On Purchase Order: Average Cost

Default Markup for Purchase Orders: 60 %

Default Checklist Report: None

Quote Quantity Value: Quantity

Contractor Consumes Labour Budget

Subcontractor Consumes Labour Budget

Debtor Stop Credit Behaviour

Stop Credit Behaviour on Time Entry Creation: Deny

Stop Credit Behaviour on Task Creation: Deny

Stop Credit Behaviour on Job Creation: Deny

This then flows through to the job financial summary report against the job in TimeTrak as per below:

Sub Job - 10,000KM WARRANTY SERVICE - QEY-999 (6)

History Notes (0)	Articles (0)	Attachments (0)	Disbursements (0)	Purchase Orders (0)	Quote Lines (6)	Serviceable Units (0)	Reports
Details	Job Financial Summary	Location	Appointments (0)	Time Entries (0)	Tasks (0)	Notes (0)	
Costs							
Value:			\$269.66	\$517.75	\$203.17	\$0.00	\$314.59
Total:			\$269.66	\$1,267.75	\$203.17	\$0.00	\$1,064.59
TimeTrak Data							
Hours							
			Actual	Write Off	WIP		
Users:			0.00	0.00	0.00		
Contractors ^[2] :			0.00	0.00	0.00		
Subcontractors:			0.00	0.00	0.00		
Equipment ^[2] :			0.00	0.00	0.00		
Total Hours^[2]:			0.00	0.00	0.00		
Time:			\$0.00	\$0.00	\$0.00		
Disbursements:			\$0.00	\$0.00	\$0.00		
Travel Fees:			\$0.00	\$0.00	\$0.00		
TimeTrak Total:					\$0.00		
Job Summary							
Total WIP:							\$1,064.59
Budget Remaining ^[3] :						-7.50	-\$998.10
Remaining to be Invoiced from Budget:							\$66.49
Scheduled Appointments ^[3] :						0.00	
Unscheduled Time Remaining from Budget ^[2] :						-7.50	
All figures shown are at sellprice value, except Write Off which is at cost.							
[1] Values are shown at cost.							
[2] User types do not consume budgeted hours.							
[3] Excludes time entries & appointments for user types that do not consume budgeted hours.							

Post Close

Control numbers beside each licence type

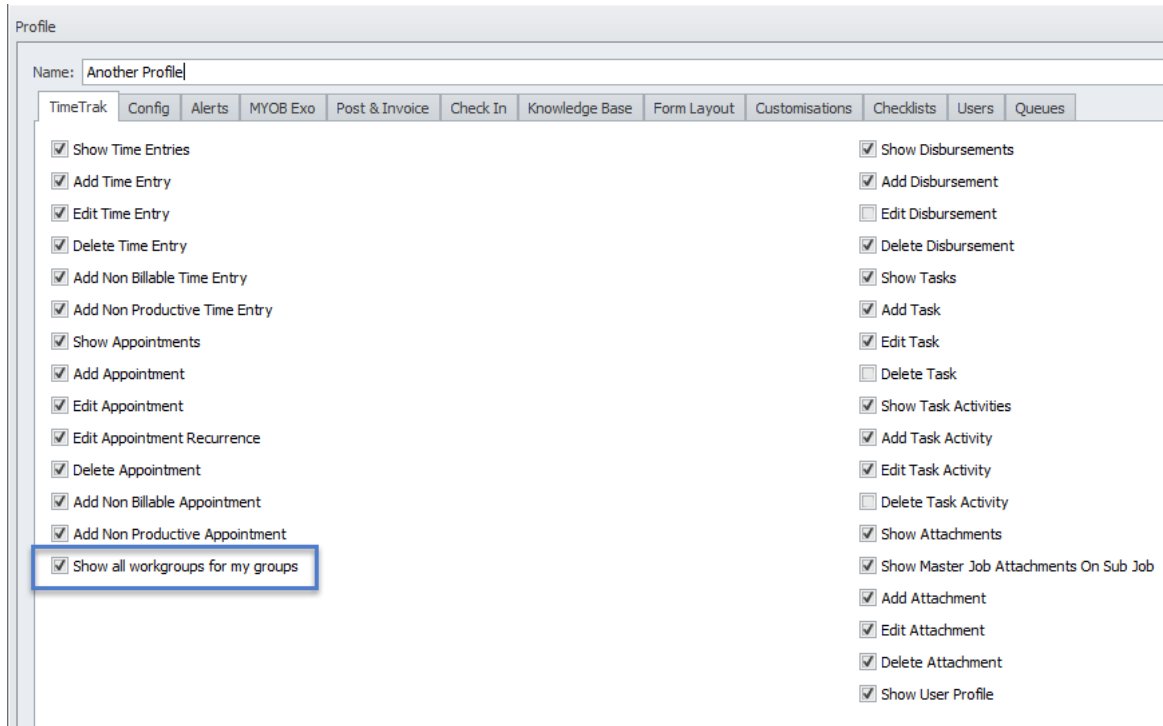
These control numbers indicate whether or not the licence type is included in the budget and this is stipulated clearly at the bottom of the job financial summary report.

In the above example Subcontractors time DOES consume the labour budget (ticked on in global admin settings) so the [2] is removed from beside this licence type in the report.

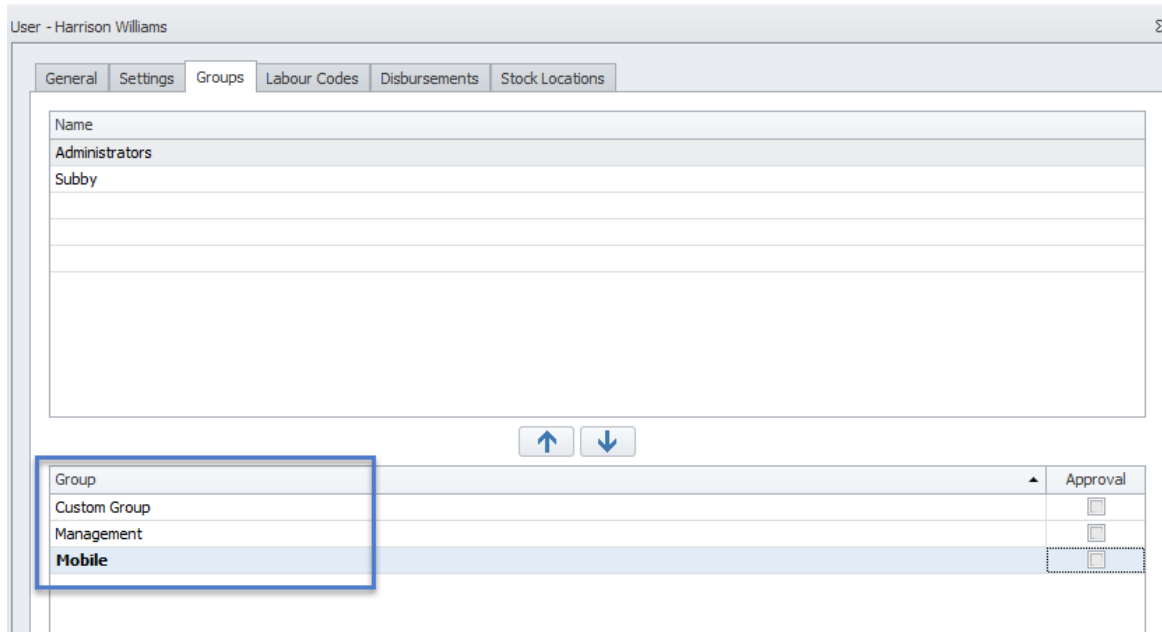
Visibility of all workgroups that belong to a user's TimeTrak group(s) is enabled via the new profile setting below:

Go into the TimeTrak Admin Console
Profile Menu
TimeTrak Tab within the Profile.

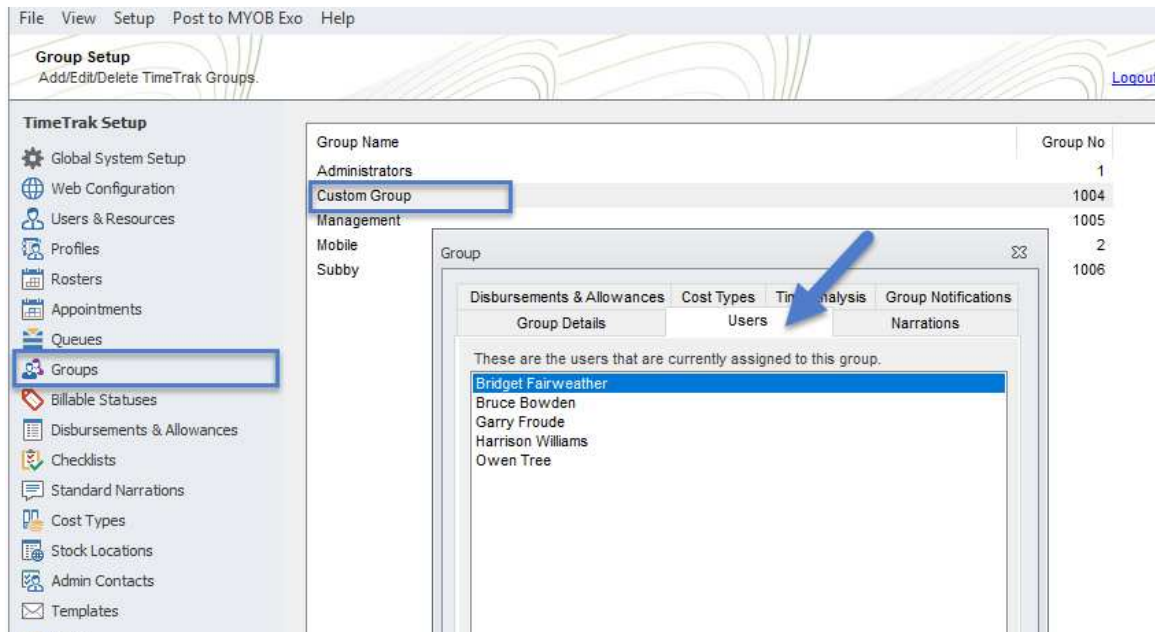
Tick on Show all work groups for my groups as per below.



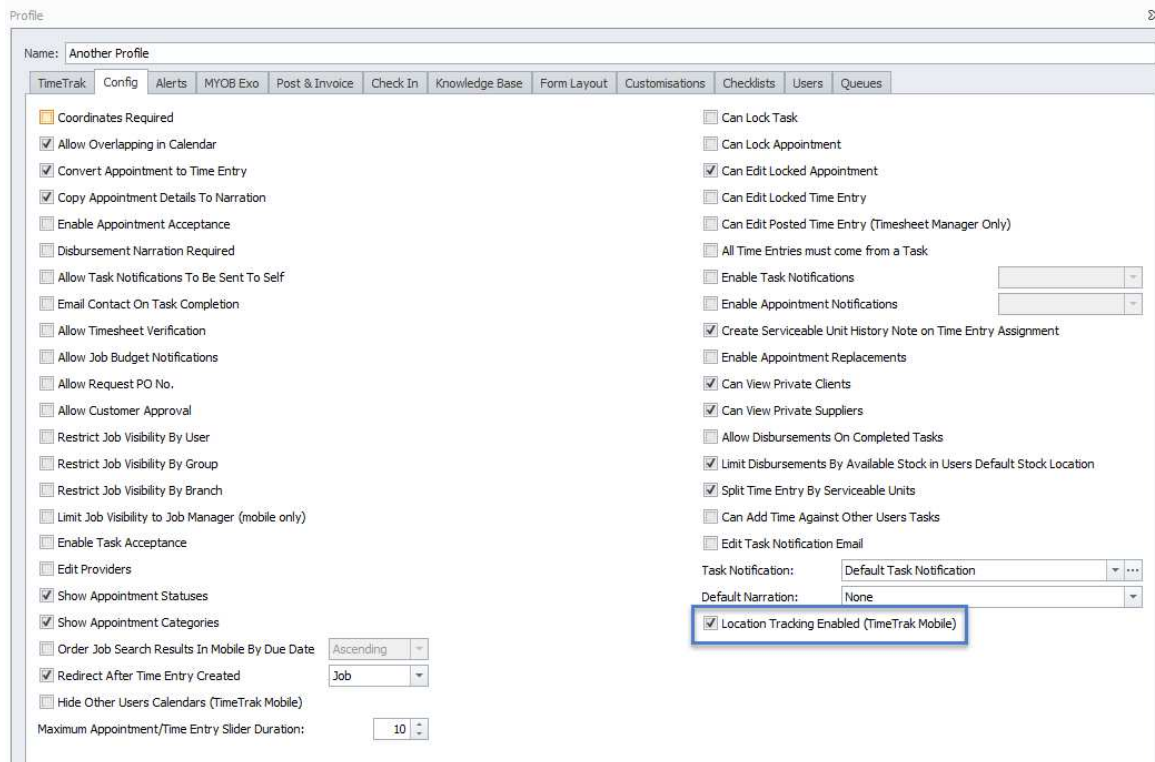
Enabling this setting against a profile means that users against this profile will be able to see all workgroups against all users in their specified group(s), as per below:
 In the below case Harrison Williams will be able to see all workgroups for users that belong to his groups - Custom group, Management and Mobile.



To see which users belong to these groups, go to Groups, select the group in question and click the Users tab as per below:



Another profile setting that is new is "Location Tracking Enabled (TimeTrak Mobile)" As per below.



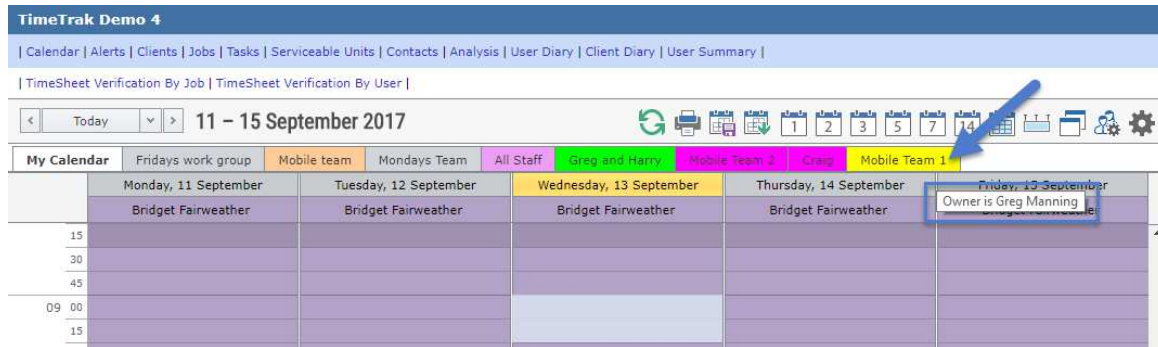
If you would like TimeTrak to record the location of your Mobile users the above profile setting needs to be enabled.

The users also need to allow the TimeTrak website to track their location on their device.

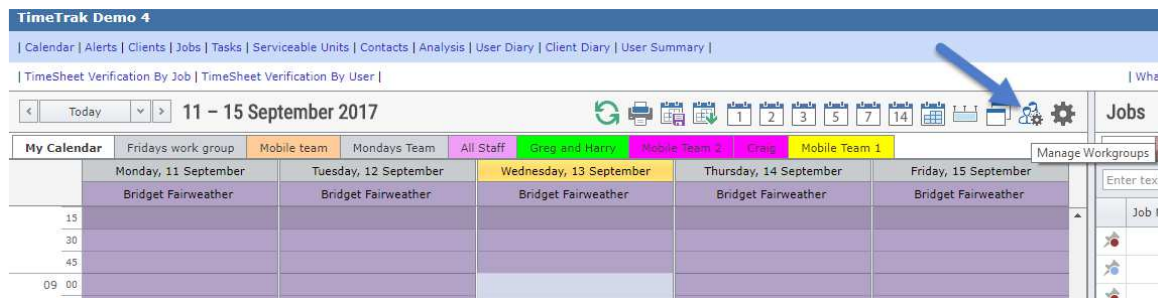
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Workgroups in TimeTrak Professional for schedulers

When hovering over a workgroup tab in Professional you can now see who the workgroup owner is as per below:



The below icon has been added to take you directly to the Manage Workgroups screen.




The Manage Workgroups screen has been re-designed to be more user friendly.

If you have the profile setting "Show all workgroups for my groups" enabled by default you will land in the "My Visible Workgroups" view as per below where changes can be made to user's workgroups by clicking on the edit icon. Additional workgroups can be added by clicking on the add icon.

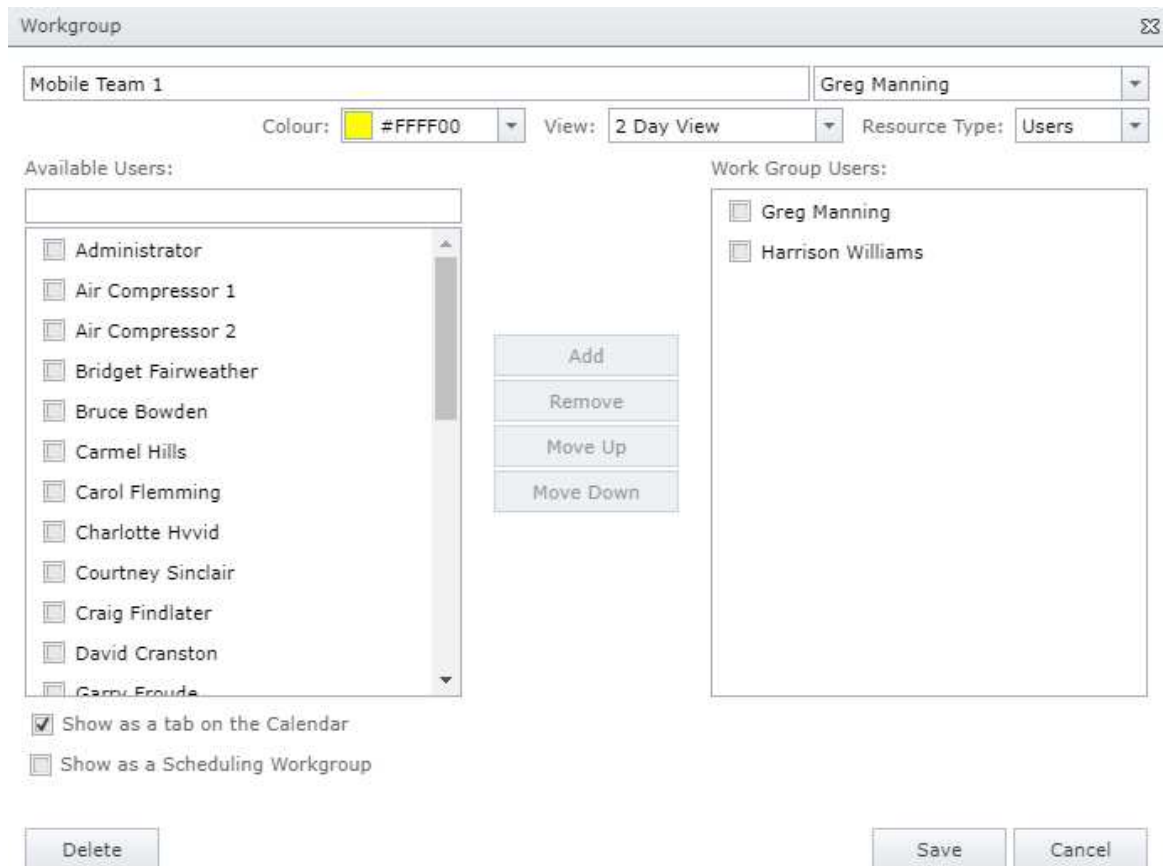
Note: My Visible Workgroups cannot be ordered by user which is why the ordering arrows are removed from this screen.

Manage Workgroups					
Workgroups					
My Visible Workgroups					
Name	Owner	Default View	Colour	Calendar	Appointment
Fridays work group	Craig Findlater			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mobile team	Charlotte Hvid			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mondays Team	Greg Manning	Day		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Greg and Harry	Bridget Fairweather	WorkWeek		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile Team 2	Bridget Fairweather			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Craig	Bridget Fairweather			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mobile Team 1	Greg Manning	2Day		<input checked="" type="checkbox"/>	<input type="checkbox"/>
All Staff	Bridget Fairweather	Day		<input checked="" type="checkbox"/>	<input type="checkbox"/>

If looking at a workgroups calendar (instead of your own) the below workgroup icon will become available along with the workgroup owners name underneath as per below:

My Calendar	Fridays work group	Mobile team	Thursday Team	Southland	Mobile Team 2	Craig	Mobile Team 1	All Staff	Equipment List 1	Equi
Greg Manning	Monday, 25 September			Tuesday, 26 September						
	Greg Manning	Harrison Williams	Greg Manning	Harrison Williams						
45										
30										
45										
09:00										

Clicking this icon will take the user to the workgroup they are currently looking at where they can quickly make changes if required.



Schedulers or user's who require the ability to make changes to other user's workgroups will need to be set up as "Group Administrators" or Global Administrators in the TimeTrak Admin Console as per below.

"Group Administrator" allows them to see users in the same groups as them and make alterations to their workgroups.

"Global Administrator" allows them to see all users in all groups and make alterations to all workgroups

User - Harrison Williams

General Settings Groups Labour Codes Disbursements Stock Locations

User Type: TimeTrak Professional Image:
Job Resource: Harrison Williams
Login Id: HARRISON
Name: Harrison Williams
Short Name: Harrison
Initials: HW
Email: support@exosoft.net.nz
Password: *****
Confirm Password: *****
Profile: Admin Profile
Roster: Harrison Williams
Outlook Profile: Harrison Williams

Global Administrator Group Administrator Restricted User
 TaskTrak User Mobile User

No image da

Workgroups in TimeTrak Mobile

In Mobile there has been a lot of changes to workgroups.
Workgroups have been added as an option to the View items list

Login to Mobile

Profile

Tick on workgroups under Home Screen Configuration

Return to Home Screen

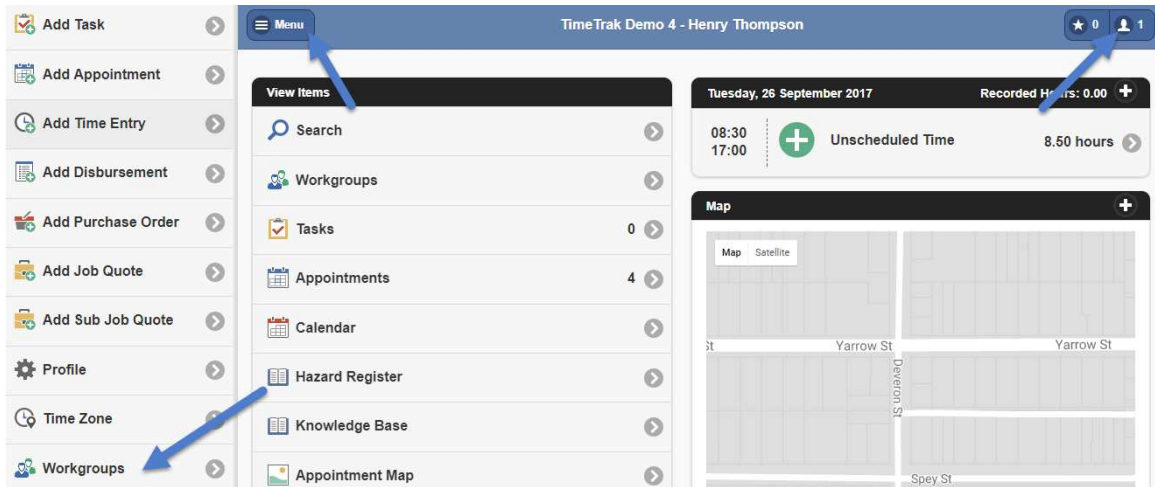
As per below Workgroups has been added as an option.



Clicking this icon will take the user to the Manage Workgroups screen.

Users can still access this screen by clicking on the person icon below (the number indicates how many other users or pieces of equipment are in the user's workgroup)

Or clicking Menu and selecting Workgroups from here.



This screen has also been added as a widget to the Home Screen.

Login to Mobile

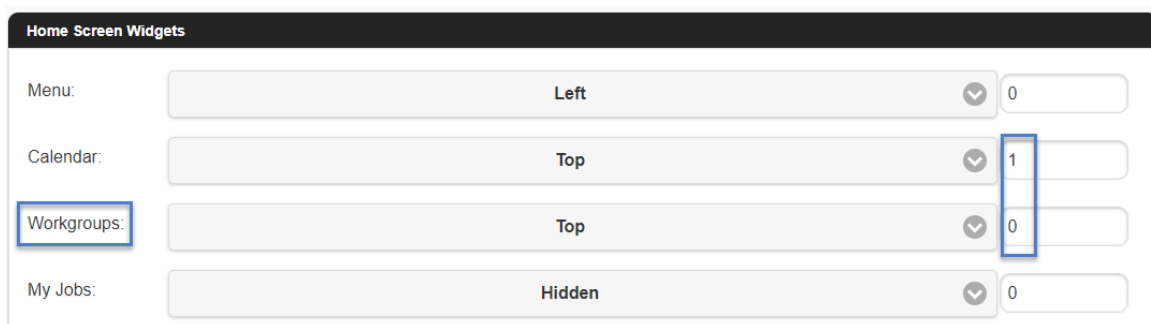
Profile

Home Screen Widgets

Workgroups

The numbers down the right hand side have been added for the user to index the position of widgets.

Eg: This User would like the Workgroups widget and Calendar widget at the top of the home screen with workgroups first, then calendar the user can index this as per below:



As you can see from the workgroups widget below the Manage Workgroups screen has also been re-designed to provide additional functionality - this functionality will be covered later in the document.

TimeTrak Demo 4 - Henry Thompson

TimeTrak Demo 4 - Henry Thompson

Tuesday

Henry Thompson
7.5 unallocated hours - Clock'd on at 11:00 AM

0% Check In Clock Off 0.38 hours Manage

Sarah Mccloud
7.5 unallocated hours - Clock'd on at 11:03 AM

0% Check In Clock Off 0.32 hours Manage

Add User

Delete Work Group

Tuesday, 26 September 2017 Recorded Hours: 0.00

08:30 17:00 + Unscheduled Time 8.50 hours

View Items Search

Map

Schedule users and equipment in one workgroup

This type of workgroup scheduling is perfect for businesses where the scheduler is almost certain of the users and equipment that will be used for each piece of work.

The scheduler can see Tuesday's workgroup which in this case belongs to Greg who is the mobile user.

In the below case Tuesday's Team is made up of the below users which are a mixture of TimeTrak user types.

"Show as a Scheduling Workgroup" should be ticked against the workgroup as per below:

Workgroup

Tuesdays Team Greg Manning

Colour: View: Day View Resource Type: Users

Available Users:

- Hydrolic Lift 03
- Internet Sales
- Jennifer Newperson
- Malcolm Breen
- Owen Tree
- Samantha McStacey
- Sarah Mccloud
- Scott Shocks
- Stefan Howden
- Tim McIntosh
- Todd Thompson

Work Group Users:

- Greg Manning
- Harrison Williams
- Hydrolic Lift 03
- Scott Shocks
- Tim McIntosh

Show as a tab on the Calendar

Show as a Scheduling Workgroup

Delete Save Cancel

With this setting ticked on, when creating an appointment in a workgroup's calendar the workgroup and users in this workgroup will load by default.

If in another calendar, the scheduler still has the ability to select the workgroup for the appointment instead of manually selecting users that make up the workgroup.

Once the workgroup is selected the scheduler can see which users belong to this workgroup as they are stated in the user field below:

New Appointment 88

Details Serviceable Units (0) Recurrence

Appointment Details

Client: Paul Holland Motors

Job: 20,000Km Warranty Service - Spj-040 - 7 (7)

Job Estimate: 0.00 hours Time Remaining: -20.00 hours

Contact: Gaylene Wards

P:06-724 5983 No Mobile support@focus...

Subject: 20,000KM WARRANTY SERVICE - SPJ-040

Location: Oteramika Road Invercargill

Workgroup: Tuesdays Team

User: Enter text to search... Remove Conflicts Clear

<input type="checkbox"/> (Select All)	<input checked="" type="checkbox"/> Greg Manning	<input checked="" type="checkbox"/> Harrison Williams
<input checked="" type="checkbox"/> Hydraulic Lift 03	<input checked="" type="checkbox"/> Scott Shocks	<input checked="" type="checkbox"/> Tim McIntosh
<input type="checkbox"/> Air Compressor 1	<input type="checkbox"/> Air Compressor 2	<input type="checkbox"/> Bridget Fairweather
<input type="checkbox"/> Bruce Bowden	<input type="checkbox"/> Carmel Hills	<input type="checkbox"/> Carol Flemming
<input type="checkbox"/> Charlotte Hvid	<input type="checkbox"/> Courtney Sinclair	<input type="checkbox"/> Craig Findlater

Status: Maintenance

Category: SLA 2

Description:

Dates

Start Time: 26/09/2017 12:00 PM

End Time: 26/09/2017 1:00 PM

Hours: 1.00 Fill Day

Show Time As: Busy Lock Appointment

Update Associated Items

Job Status: IN PROGRESS

Job Category: COMMERCIAL

Additional users not in the workgroup can be added to this appointment by selecting them. This user list has been increased to three columns, there has also been a search field added as well as icons against the user names to indicate what type of user they are as per below.

UserSearch Box

Type to search for a user. Great for companies with large user counts.

Equipment



- This icon indicates to the scheduler that the "user" is set up as an equipment user type in TimeTrak.

Contractor



- This icon indicates to the scheduler that the "user" is set up as a Contractor user type in TimeTrak.

Subcontractor



- This icon indicates to the scheduler that the "user" is set up as a Sub-Contractor user type in TimeTrak.

On Save, the appointment has been created in all of the workgroup users calendars as per below:

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TimeTrak Demo 4

| Calendar | Alerts | Clients | Jobs | Tasks | Serviceable Units | Contacts | Analysis | User Diary | Client Diary | User Summary |

| TimeSheet Verification By Job | TimeSheet Verification By User |

< Today > **26 September 2017** [Refresh] [Print] [Export] [1] [2] [3] [5] [7] [14] [Calendar] [List] [Settings]

My Calendar | Mobile team | Thursday Team | **Tuesdays Team** | Southland | Mobile Team 2 | Craig | Mobile Team 1 | All Staff | Equipment List 1 | Equipment

Greg Manning | Greg Manning | Harrison Williams | Hydraulic Lift 03 | Scott Shocks | Tim McIntosh

Time	Greg Manning	Harrison Williams	Hydraulic Lift 03	Scott Shocks	Tim McIntosh
12:00	Paul Holland Motors 20,000Km Warranty Service - Spj-040 (7)	Paul Holland Motors 20,000Km Warranty Service - Spj-040 (7)	Paul Holland Motors 20,000Km Warranty Service - Spj-040 (7)	Paul Holland Motors 20,000Km Warranty Service - Spj-040 (7)	Paul Holland Motors 20,000Km Warranty Service - Spj-040 (7)
13:00					
14:00					

If users in this workgroup are set up as a Sub-Contractor or Contractor (in this case Tim and Scott) with a preloaded Purchase Order line like below a Purchase Order will be created on saving of the appointment.

User - Tim McIntosh

General | Settings | Groups | Labour Codes | **Disbursements** | Stock Locations

Search: []

Group: All Groups

StockCode	Description
@	
AHL	AFTER HOURS LABOUR
AIRCOMPRESSOR	AIRCOMPRESSOR (PER HOUR)
AIRFILO1	OVALCHROME AIR FILTER
AIRFILO12PK	OVALCHROME AIR FILTER
AIRFILO5	PRO-STLYE AIR FILTER
AIRPRE01	AIR PRESSURE GAUGE
AIRSUS01	AIR SUSPENSION

[Up] [Down]

Stock Code	Description	Quantity	Pre Load	PO Line
LABOURC	STANDARD LABOUR CHARGE	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If the scheduler has the ability to edit Purchase Orders enabled against their profile they will be able to edit the Purchase Order that is automatically generated on appointment creation.

On opening of Tim's appointment, the scheduler can see the Purchase Order that has been created for this appointment.

Appointment (26142)

Details | Disbursements (2) | Travel Fees (0) | Serviceable Units (0) | Activities (1) | Related Appointments (4) | Recurrence

Appointment Details

Client: Paul Holland Motors

Job: 20,000Km Warranty Service - Spj-040 - 7 (7)

Job Estimate: 0.00 hours Time Remaining: -20.00 hours

Contact: Gaylene Wards

Subject: 20,000KM WARRANTY SERVICE - SPJ-040

Location: Oteramika Road Invercargill

User: Tim McIntosh

Status: Maintenance

Category: SLA 2

Purchase Order: 103113055

Description	Id	Order Date	Total
New Purchase Order			
	103113055	26/09/2017	\$50
	103112046	13/09/2017	\$50
	103111043	07/09/2017	

Dates

Start Time: 26/09/2017 12:00 PM

End Time: 26/09/2017 1:00 PM

Hours: 1.00

Show Time As: Busy

Time Entry Defaults

Status: Billable

Labour Code: LABOUR DOUBLE TIME

Cost Group: Disbursements

Cost Type: None

Update Associated Items

Job Status: IN PROGRESS

Job Category: COMMERCIAL

Buttons: Start Travel, Check In, Save, Save & Edit PO, Cancel

Clicking the down arrow as per above will show current Purchase Orders against Tim's Creditor account.

Clicking the three dots as per above or clicking Save & Edit PO, will take the user to the Purchase order screen in TimeTrak where a Purchase Order header narration can be added.

Purchase Order lines can also be added and amended as well as any attachments that are required.

A Custom Purchase Order report that can be made to fit your requirements can then be run from the reports tab of the Purchase Order.

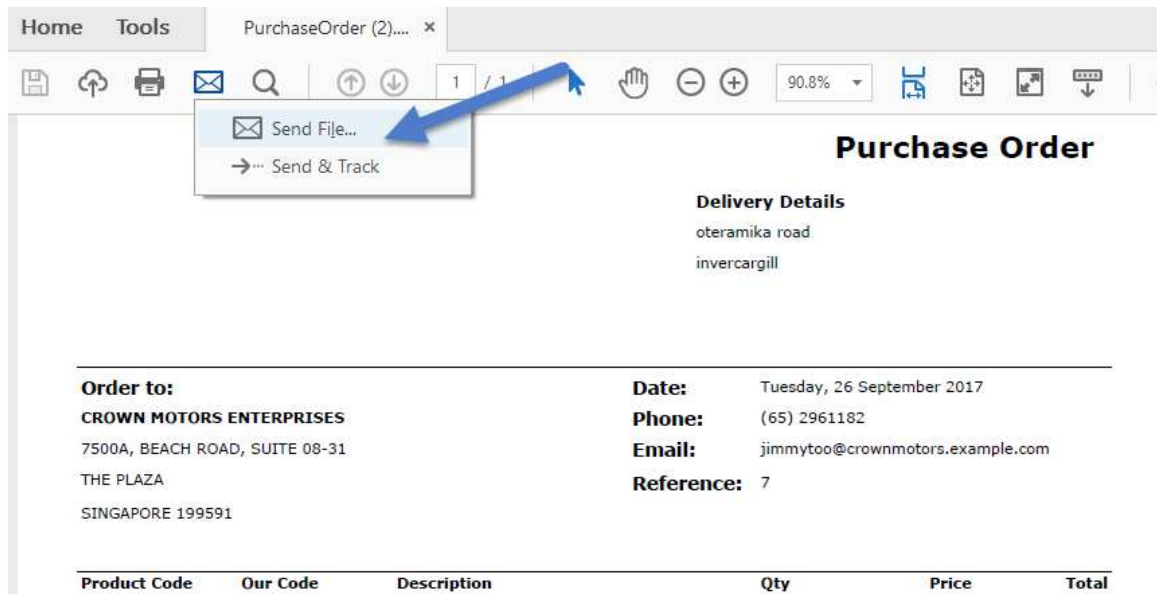
Purchase Order

Details | Purchase Order Lines (1) | Attachments (0) | Reports

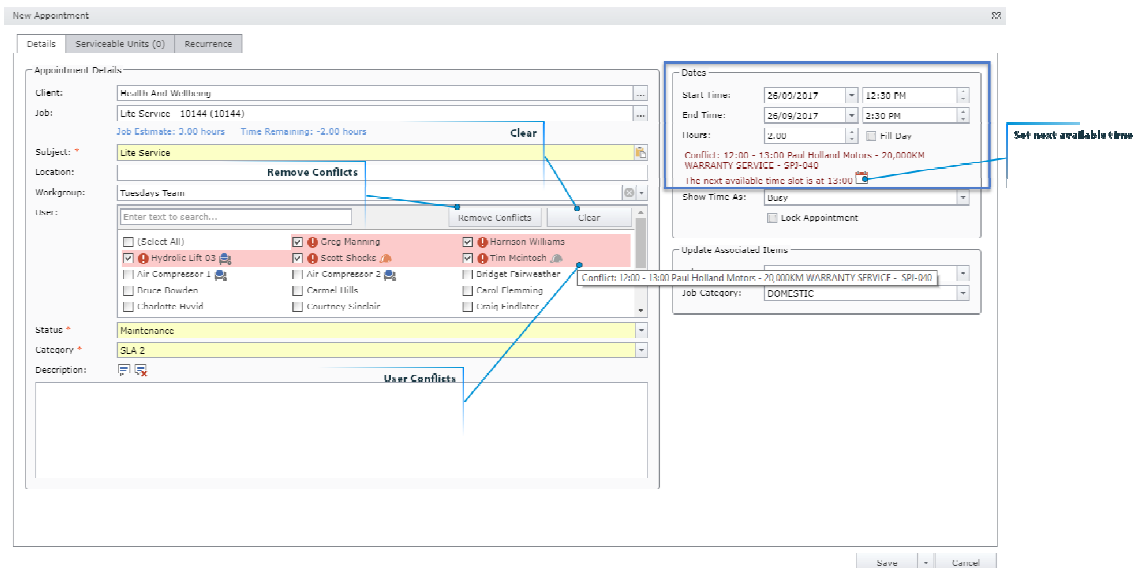
Enter text to search... Search

Name
PurchaseOrder

Once saved as a PDF, there is the option to send the Purchase Order via email through to the Sub-Contractor or Contractor:



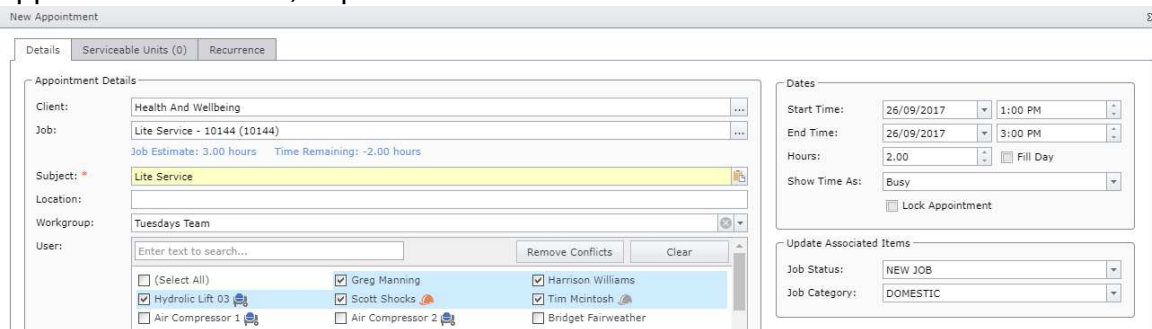
When the scheduler creates another appointment that conflicts they are able to see this immediately as per below:



• **Set next available time**

Set next available time looks for the next available time slot in the user's calendar which in the above case is 1pm.

Clicking this icon will change the appointment start time and end time (while keeping the appointment duration) as per below:



• **Remove Conflicts**

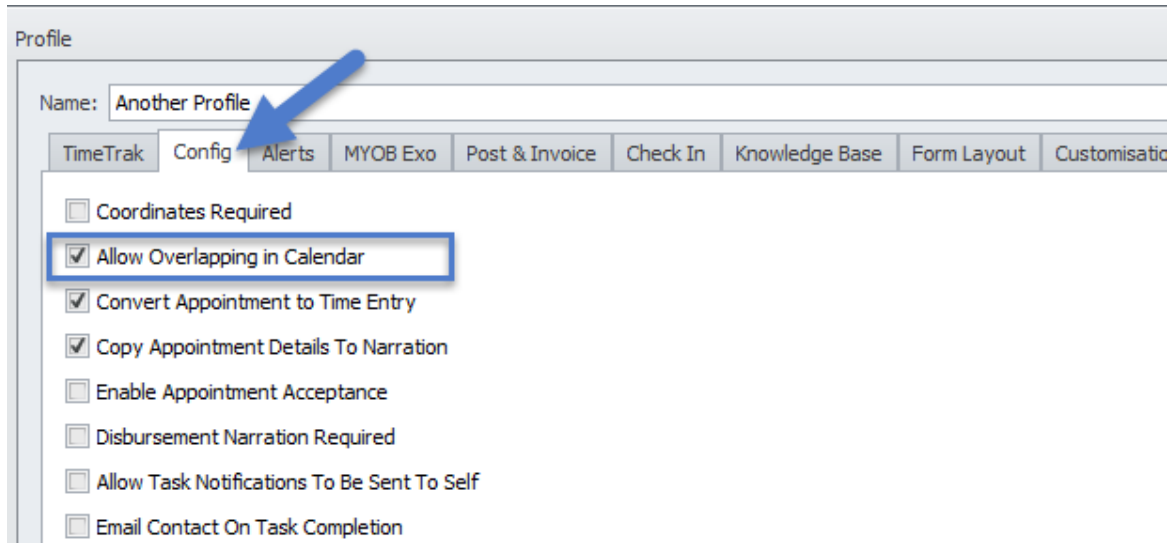
Removes all users that have conflicts only, leaves users that do not have conflicts ticked on.

• **Clear**

Clears all users from the appointment.

• **User Conflicts**

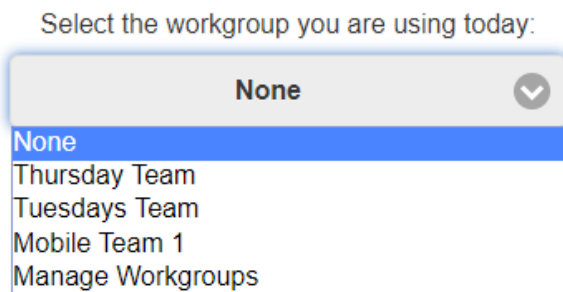
Hovering over these users you are able to see what the appointment conflict is. If the user's profile, as per below, allows overlapping in their calendar then you can continue to select the user even if it will cause a conflict and create an additional appointment for them.



In Mobile when Greg logs in he is presented with the below screen where he can select which workgroup he is working with.

Workgroups that appear in this list are based on the workgroup owner and it is recommended that a mobile user only has one workgroup to prevent any confusion.

Select Workgroup



Selecting the workgroup that applies the user can see who is meant to be in there workgroup for the day:

Select Workgroup

Select the workgroup you are using today:

Mondays Team



Greg Manning, Harrison Williams,
Hydrolic Lift 03, Scott Shocks, Tim
Mcintosh

Ok

If clock on is enabled for your database and you have selected a workgroup for the day, when the clock on pop up appears by default "Clock on all Workgroup users" will be enabled by default.

Clock On

Do you want to clock on for today?

Clock On Note

Clock On All Work Group Users

Ok

Cancel

This information is now available in Professional to the scheduler, as per below when users have clocked on a "C" will appear beside their name. Hovering over this, users can see what time the user clocked on.

TimeTrak Demo 4

Calendar | Alerts | Clients | Jobs | Tasks | Serviceable Units | Contacts | Analysis | User Diary | Client Diary | User Summary |

TimeSheet Verification By Job | TimeSheet Verification By User |

< Today > **26 September 2017** [Refresh] [Print] [Export] [Calendar 1] [Calendar 2] [Calendar 3] [Calendar 5] [Calendar 7] [Calendar 14] [Settings]

My Calendar	Mobile team	Thursday Team	Tuesday	Tuesdays Team	Southland	Mobile Team 2	Mobile Team 1	All Staff	Equipment List 1
Greg Manning	Greg Manning	Harrison Williams	Hydrolic Lift 03	Scott Shocks	Tim Mcintosh				
15									
30									
45									

Clocked on at 26/09/17 11:27

Back in Mobile against the appointment there is now an additional widget "Related Appointments" so the Mobile user can quickly see who was scheduled to attend the appointment with them. If for some reason a user was scheduled to attend and hasn't arrived the mobile user would be able to quickly identify this as per below:

Appointment Details Job id: 7

Client: Paul Holland Motors

Job: 20,000Km Warranty Service - Spj-040

Subject: 20,000KM WARRANTY SERVICE - SPJ-040

Location: Oteramika Road Invercargill

User: Greg Manning

Date: Tuesday, 26 September 2017

Time: 12:00 PM - 1:00 PM

Duration: 1.00 hours

Show Time As: Busy

Status: Maintenance

Category: SLA 2

Contact: Gaylene Wards

Phone: 06-724 5983

Mobile:

Site Address: oteramika road invercargill

Created by Bridget Fairweather on Tuesday, 26 September 2017 at 9:42 AM

Edit

Delete

Change Job

Convert to Time Entry

Get Directions

Check In To Appointment

Start Travel

Check In

Users:

Greg Manning, Harrison Williams, Hydrolic Lift 03, Scott Shocks, Tim Mcintosh

Summary Total

Disbursements

Travel Fees

Purchase Orders

Related Appointments

Harrison Williams 26/09/2017 12:00 PM
7 - 20,000KM WARRANTY SERVICE - SPJ-040

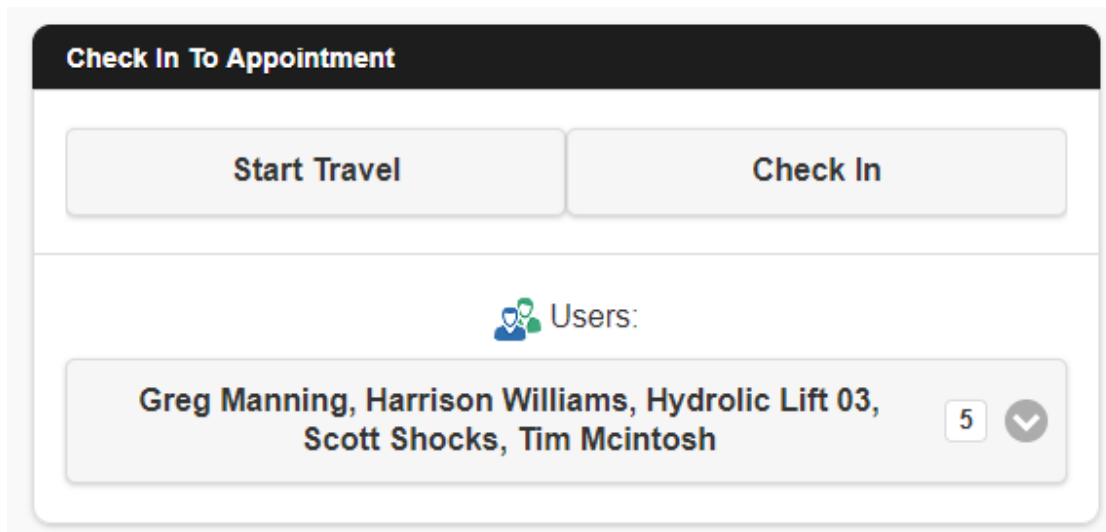
Hydrolic Lift 03 26/09/2017 12:00 PM
7 - 20,000KM WARRANTY SERVICE - SPJ-040

Scott Shocks 26/09/2017 12:00 PM
7 - 20,000KM WARRANTY SERVICE - SPJ-040

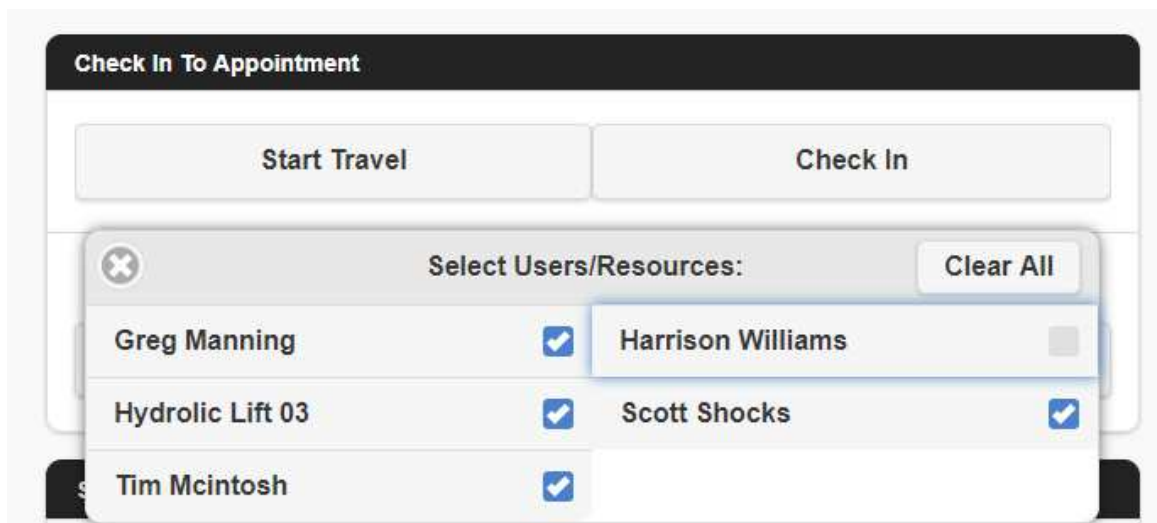
Tim Mcintosh 26/09/2017 12:00 PM
7 - 20,000KM WARRANTY SERVICE - SPJ-040

Add Appointment

In the Check In widget, It again clearly states the users that are in the workgroup:



If, for some reason, a user is not going to work on this appointment the mobile user has the ability to un-tick them prior to start travel or check-in. At which point, when the time entry is saved they will need to save and manage users to un-tick this user again or a travel/ time entry will still be created for them.



The user can then start travel, or check in directly to the job and complete any checklists required depending on their business process.

In Professional, the scheduler can see that the workgroup is traveling to the appointment. This is indicated by the truck icon against the appointment. There is also additional calendar settings available in professional as per below:

Calendar Settings

Workgroups General **Users**

Refresh Calendar: 0 minutes.

Refresh Position: Start of Day

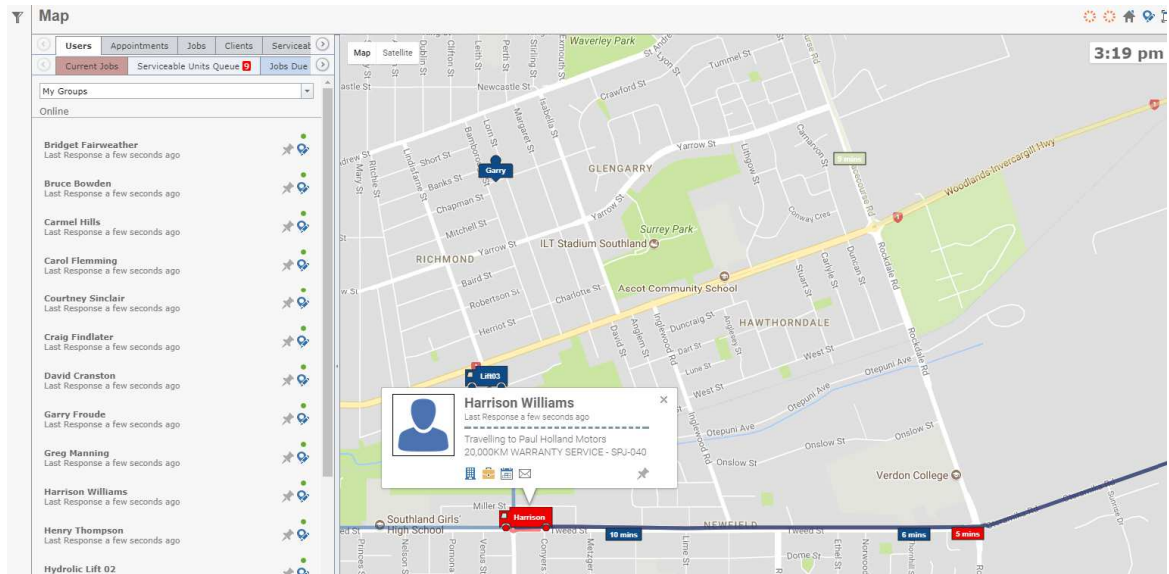
Group By: Date

- 24 Hour Calendar Time Display
- Auto Pin Job After Job Creation
- Group Work Groups Together
- Open Create Time Entry/Appointment Screen After Selection
- Print Scheduler for 24 Hours
- Show Future Days in Two or Three Day View
- Show TimeTrak Groups
- Show Tooltips
- Unpin Task/Job After Time Entry/Appointment Creation
- Show User Time Remaining/Duration and Appointment Start Time
- Show User Estimate Time of Arrival

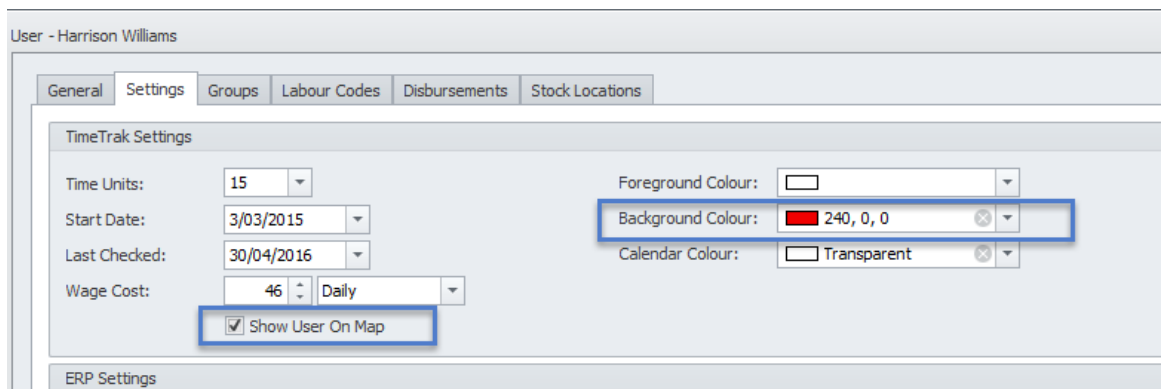
In order for the data to appear in these calendar settings, the TimeTrak Maps window must be running (this can be minimised down but needs to be running to allow for accurate up to date data).

The screenshot shows the TimeTrak software interface. At the top, it says "Logged in as: Bridget Fairweather (Switch User | Logout)". Below that is a navigation bar with "User Diary | Client Diary | User Summary |" and a "Select a Report" dropdown. The main area is divided into a left sidebar with team names (Mobile Team 1, Mobile Team 2, Mondays Team, Greg and Helen) and a right pane titled "Jobs". In the "Jobs" pane, there are tabs for "Jobs", "Current Jobs", "Serviceable Units Queue", "Jobs Due Tomorrow", and "Western". A blue arrow points to a "Map" button in the top right corner of the "Jobs" pane.

As per below this map will show the location and current status of users.



In order for users to appear on the above map they must have "show user on map" ticked on against their user in the TimeTrak Administrator Console. You can also stipulate the colour of their map indicator here by setting the background colour.



Show user Time Remaining/Duration and Appointment start time.

If this calendar setting is ticked on, the checked in or travel icon will appear under the users name depending on their current status.

The figures are "Time remaining if traveling" or "Current duration if checked in/ Appointment Start Time".

TimeTrak Demo 4

| Calendar | Alerts | Clients | Jobs | Tasks | Serviceable Units | Contacts | Analysis | User Diary | Client Diary | User Summary |

| TimeSheet Verification By Job | TimeSheet Verification By User |

< Today > **13 September 2017**

My Calendar | Fridays work group | Mobile team | **Mondays Team** | Greg and Harry | Mobile Team 2 | Craig | Mobile Team 1 | All Staff

	Greg Manning	Harrison Williams	Hydrolic Lift 03	Scott Shocks	Tim McIntosh
0:08 / 14:50			0:08 / 14:50	0:08 / 14:50	0:08 / 14:50
15:00					
15:15					
15:30					
15:45					
16:00					
16:15					
16:30					
16:45					
17:00					

Show User Estimate Time of Arrival

Having both of these calendar settings ticked on will switch between the two options.

Clicking on this field in Professional will show the scheduler the user on google maps as per below:

Monday, 7 August

Harrison Williams 0:02 / 15:30

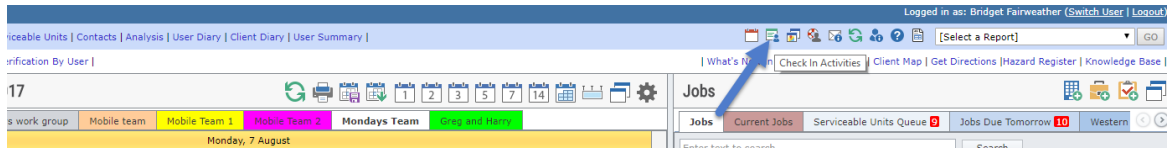
Checked in to Paul Holland Motors 20,000KM WARRANTY SERVICE - SPJ-040

PAUL HOLLAND MOTORS

Map data ©2017 Google

Refresh Close

The scheduler now also has a Check In Activities Report Available in Professional as per below:



The report can be run by group and shows users and their current activity as well as their next activity.

There is the option to view the report on a black background if preferred by clicking the Invert icon the arrow is pointing at below:

Current Activity							Wednesday, 13 September 2017 3:05 PM		
Status	Time to Arrival	ETA	Time	Client	Appointment	Time	Client	Appointment	
Checked in	no time		02:50pm	PAUL HOLLAND MOTORS	20,000KM WARRANTY SERVICE - SPJ-040	04:00pm	HEALTH AND WELLBEING	Lite Service	
						04:00pm	PAUL HOLLAND MOTORS	20,000KM WARRANTY SERVICE - SPJ-040	
Checked in	no time		02:50pm	PAUL HOLLAND MOTORS	20,000KM WARRANTY SERVICE - SPJ-040	04:00pm	HEALTH AND WELLBEING	Lite Service	

On check out of the appointment, the Mobile user completes their time entry as per usual and they are advised of the users in their workgroup as per below.

They then have the below options.

Save - Save time entry for themselves and the users in their workgroup that is specified.

Save & Manage Other Users - Save time entry and manage other users in your workgroup.

Save & Add Disbursement - Save time entry for all users in the workgroup and add disbursement(s) that were used.

Save & Add Disbursement From Quote Line - Save time entry for all users in the workgroup and add disbursement(s) from the job quote lines.

Narration:

20,000KM WARRANTY SERVICE - SPJ-040



Work Verification

i Your work group members are Harrison Williams, Hydraulic Lift 03, Scott Shocks, Tim McIntosh.

Save



Save & Manage Other Users



Save & Add Disbursement



Save & Add Disbursement From Quote Line



Schedule users and equipment in separate workgroups

This type of workgroup scheduling is perfect for businesses where the scheduler is not certain of the users and equipment that will be used for each piece of work.

Many of the settings from the above scheduling method '**schedule users and equipment in one workgroup**' still apply and will be referenced throughout this process.

In this scheduling method, workgroups are generally set up for schedulers as a selection of users as per below.

"Show as a Scheduling Workgroup" is not enabled as user(s) will be manually selected for appointments.

Workgroup

Southland

Bridget Fairweather

Colour: #00FF00

View: Day View

Resource Type: Users

Available Users:

- Garry Froode
- Greg Manning
- Harrison Williams
- Henry Thompson
- Hydraulic Lift 02
- Hydraulic Lift 03
- Internet Sales
- Jennifer Newperson
- Malcolm Breen
- Owen Tree
- Samantha McStacey
- Sarah Mccloud

Work Group Users:

- Harrison Williams
- Greg Manning
- Henry Thompson
- Malcolm Breen
- Owen Tree

Add

Remove

Move Up

Move Down

Show as a tab on the Calendar

Show as a Scheduling Workgroup

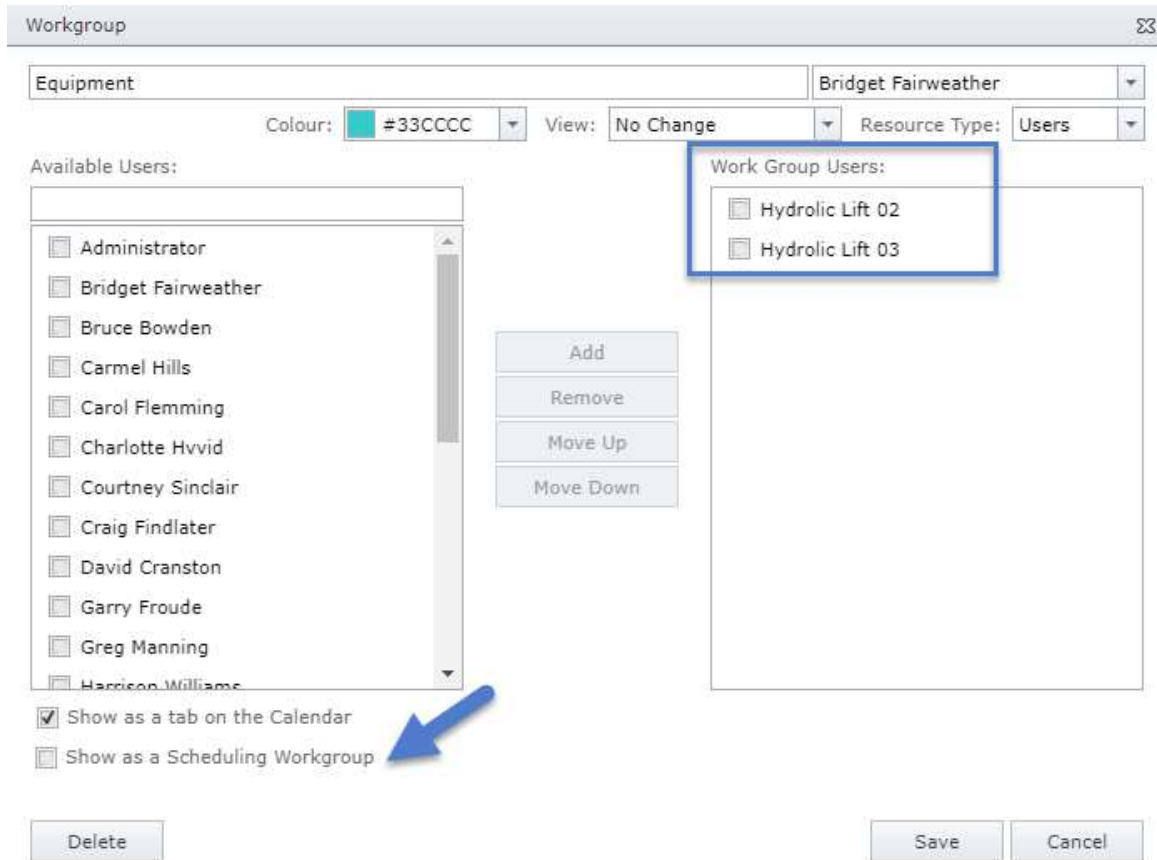
Delete

Save

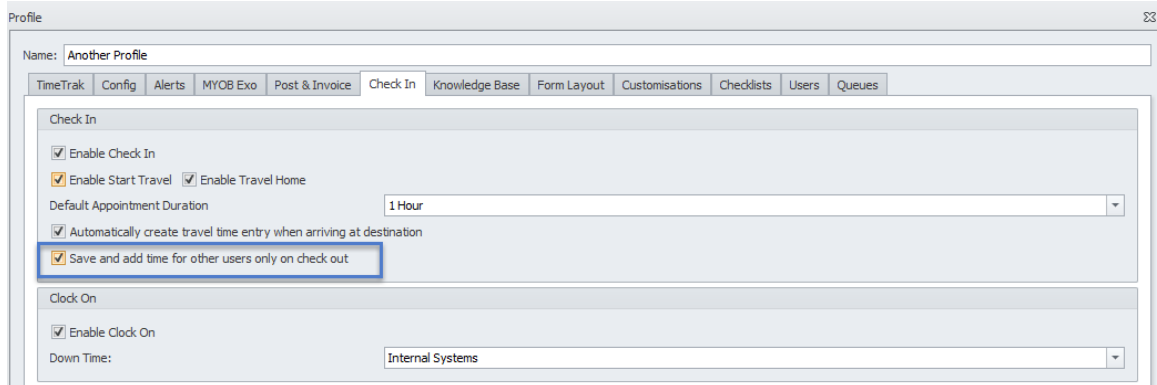
Cancel

The same will apply for equipment which can be its own workgroup if required.

The benefit of this would be that you could go to the "equipment" calendar to see when equipment is not scheduled.



The Mobile users profile will have the below setting enabled which removes the ability to Save a time entry - they will be forced to save and manage other users.



When an appointment is created the scheduler selects the user(s) and equipment that they believe will be required to complete the job by selecting them from the user drop down field.

As mentioned in the first scheduling method, if there are appointment conflicts the scheduler will be notified of these.

If the users profile has "Allow Overlapping in Calendar" enabled this can be over written.

Again, if any of the users selected are set up in TimeTrak as Contractors, Sub-Contractors or Sub-Contractors (schedule only) their individual appointments can be opened and Purchase Orders amended and emailed if required and permissions allow.

In Professional when opening this appointment in one user's calendar, there is a related appointments tab which shows the other appointments that relate to this appointment.

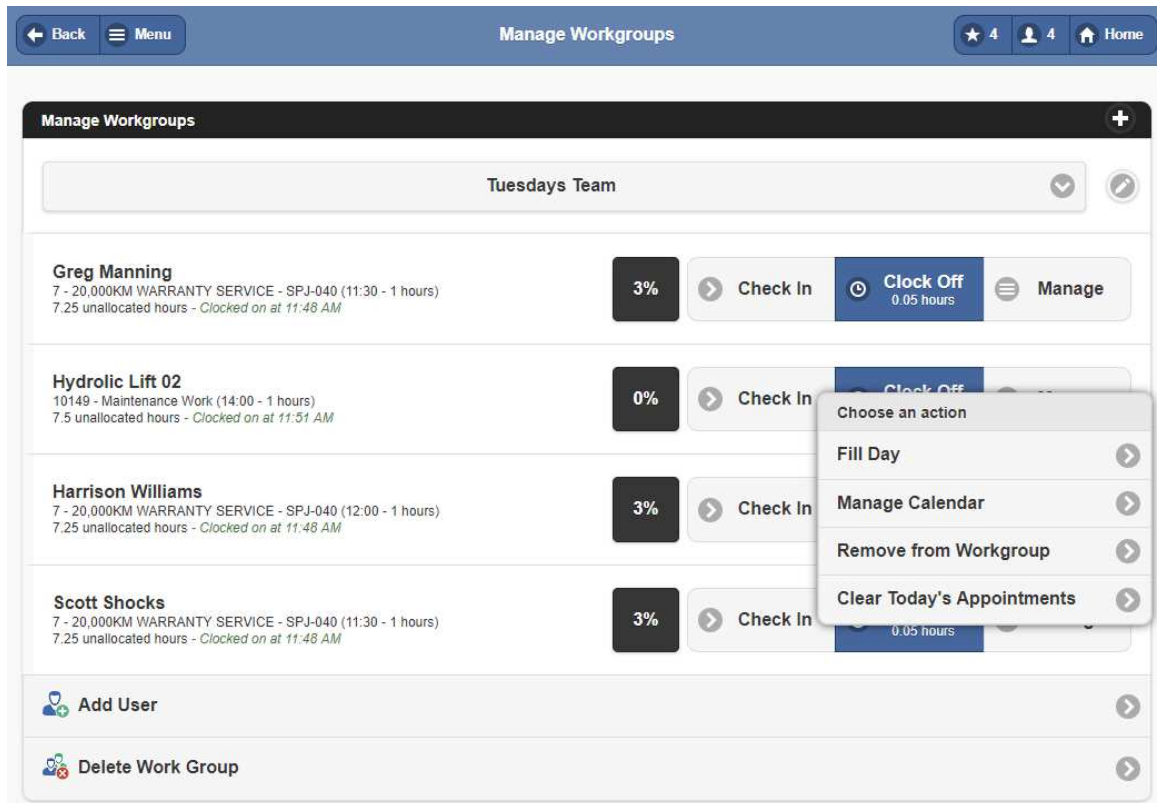
Subject	Start Time	Hours	User
Maintenance Work	26/09/2017 14:00	1.00	Greg Manning
Maintenance Work	26/09/2017 14:00	1.00	Hydraulic Lift 02
Maintenance Work	26/09/2017 14:00	1.00	Scott Shocks

Ticking on "Show occurrences" includes any recurring appointments in the selected date range as well as the appointment you currently have open (in this case Harrison Williams Appointment).

Subject	Start Time	Hours	User
Maintenance Work	26/09/2017 14:00	1.00	Harrison Williams
Maintenance Work	26/09/2017 14:00	1.00	Greg Manning
Maintenance Work	26/09/2017 14:00	1.00	Hydraulic Lift 02
Maintenance Work	26/09/2017 14:00	1.00	Scott Shocks

In Mobile when logging in the user will have the option to select their current work group or go to the Manage Workgroups screen as per the first scheduling method to manage the users in their workgroup for the day.

In this scheduling method the Mobile user has more control of his workgroup as this could change rapidly and the scheduler may not always be aware of the changes prior to the event.



If Clock On is enabled the Clock On button will be visible against users. Again by default Clock On All Workgroup Users will be ticked.

Clock On

Are you sure you want to clock on?

Clock On Note


Clock On All Work Group Users


Ok Cancel

Against the appointment the users included in your workgroup are available in the Check In widget:


Check In To Appointment

Start Travel Check In

 Users:

Greg Manning, Hydraulic Lift 02, Harrison Williams, Scott Shocks 4 

There is also the Related Appointments widget which shows appointments for other users or equipment that relate to your appointment - another related appointment can be created in this widget also.

Related Appointments		+
Harrison Williams 10149 - Maintenance Work	26/09/2017 2:00 PM	>
Hydrolic Lift 02 10149 - Maintenance Work	26/09/2017 2:00 PM	>
Scott Shocks 10149 - Maintenance Work	26/09/2017 2:00 PM	>
 Add Appointment		>


Start travel, or check in to the appointment depending on your business process. Once the work is completed Check Out.

You will be advised of the users currently in your workgroup as per below but only have the option to Save & Manager Other Users:

Narration:

Work Verification

i Your work group members are Hydrolic Lift 02, Harrison Williams, Scott Shocks.

Save & Manage Other Users 

You will be taken to the Add Time Entries for Other Users Screen as per below where you can amend users in your workgroup's cost type, start time and duration.


If one of the users was not onsite you can un-tick them and a time entry will not be created for this user (In the below case Harrison).

If additional users or equipment were used these can be added on this screen also by clicking Add user/ resource and searching and selecting additional user's by TimeTrak group.

← Back Menu Add Time Entries For Other Users ★ 4 👤 3 Home

Add Time Entries For Other Users +

i Your time entry was saved successfully. You can now add time entries for other users.

User	Cost Type	Start Time	Duration
Related Appointments			
<input type="checkbox"/> Harrison Williams 10149 - Maintenance Work	Labour ▼	26/09/2017 12:00 PM	0.25
<input checked="" type="checkbox"/> Hydraulic Lift 02 10149 - Maintenance Work	Labour ▼	26/09/2017 12:00 PM	1
<input checked="" type="checkbox"/> Scott Shocks 10149 - Maintenance Work	Labour ▼	26/09/2017 12:00 PM	1
<input type="text" value="Add User / Resource"/> 			
Save ➤			
Save & Add Disbursement ➤			
Save & Add Fixed Travel Charge ➤			
Close ➤			

In the below case an additional Hydraulic Lift was used but only for half an hour - this has been added and shows under the "Other Users" heading on this page where the cost type and start time and duration can be amended.

Add Time Entries For Other Users
+

i Your time entry was saved successfully. You can now add time entries for other users.

User	Cost Type	Start Time	Duration
Related Appointments			
<input type="checkbox"/> Harrison Williams 10149 - Maintenance Work	Labour	26/09/2017 12:00 PM	0.25
<input checked="" type="checkbox"/> Hydrolic Lift 02 10149 - Maintenance Work	Labour	26/09/2017 12:00 PM	1
<input checked="" type="checkbox"/> Scott Shocks 10149 - Maintenance Work	Labour	26/09/2017 12:00 PM	1
Other Users			
<input checked="" type="checkbox"/> Hydrolic Lift 03 10149 - Maintenance Work	Misc Costs	26/09/2017 12:00 PM	0.5
<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center; justify-content: center;"> + Add User / Resource </div>			
Save ➔			

The user then has the below options:

Save - Saves the time entries for all users specified in the list (ticked on)

Save & Add Disbursement - Saves the time entries for all users specified in the list (ticked on) and allows the user to add disbursements to their time entry.

Note: Disbursements will only be added to the logged on user's time entry not all users in the workgroups time entries.









Save & Add Fixed Travel Charge - This option will only appear if you have Fixed Travel Charge disbursements set up in your TimeTrak database.

Close - Does not create time entries for any other users other than the logged in user.

Back in Professional the scheduler can see that Harrison is checked in but his appointment has not been converted to a time entry like the rest of the users in Greg's Workgroup.

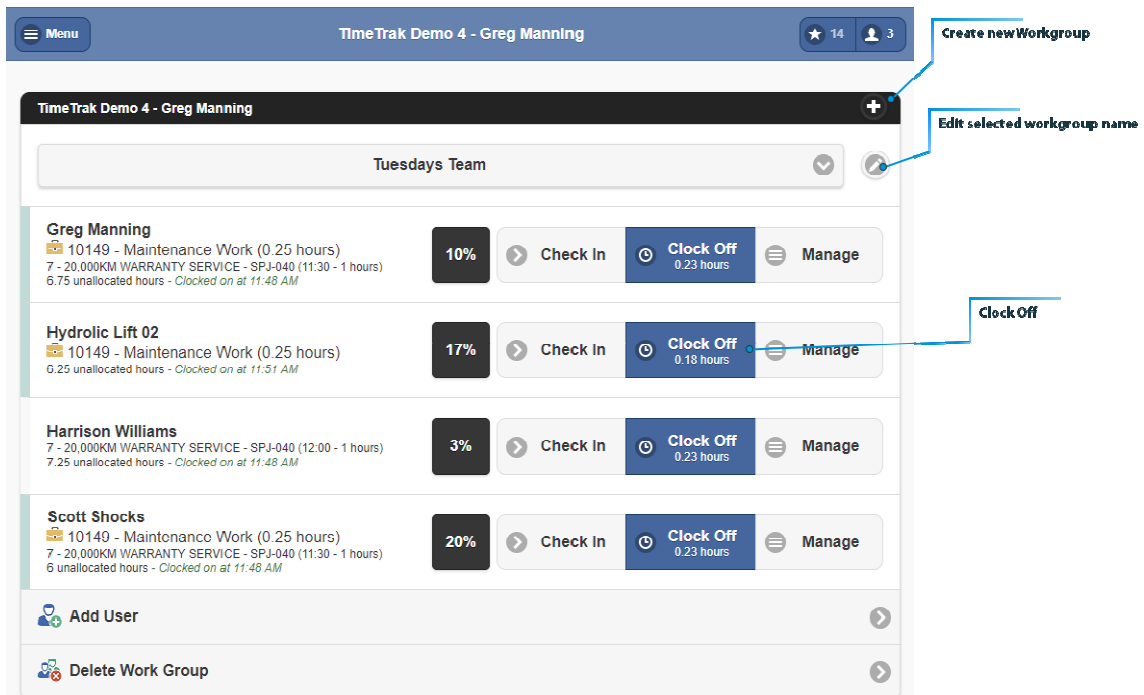
Tuesday, 26 September					
Bridget Fairweather	Harrison Williams	Greg Manning	Hydrolic Lift 02	Hydrolic Lift 03	Scott Shocks
12:00	Comfort Automotive Serv	Comfort Automotive Serv	Comfort Automotive Serv	Comfort Automotive Serv	Comfort Automotive Serv
15:00	Maintenance Work (10149) Description	Maintenance Work (10149) Maintenance Work	Maintenance Work (10149) Maintenance Work	Maintenance Work (10149) Maintenance Work	Maintenance Work (10149) Maintenance Work
13:00	Paul Holland Motors	Paul Holland Motors		Paul Holland Motors	Paul Holland Motors
15:00	20,000Km Warranty Service - Spj-040 (7)	20,000Km Warranty Service - Spj-040 (7)		20,000Km Warranty Service - Spj-040 (7)	20,000Km Warranty Service - Spj-040 (7)

Against Greg's time entry on the related items tab the scheduler can see the other time entries that relate to this one including the additional time entry for the Hydrolic lift 03 that was used "on the fly" it was not scheduled and did not have an appointment for this work.

Time Entry (31558)							
Details		Disbursements (1)	Activities (9)	Related Items (4)	Articles (0)	Serviceable Units (0)	Reports
User	Narration	Entry Date	Quote Option	Time	Hours	Cost	
Scott Shocks	Maintenance Work	26/09/2017	DEFAULT OPTION	12:00 - 13:00	1.00	\$58.84	 
Hydrolic Lift 03	Maintenance Work	26/09/2017	DEFAULT OPTION	12:00 - 12:30	0.50	\$19.61	 
Hydrolic Lift 02	Maintenance Work	26/09/2017	DEFAULT OPTION	12:00 - 13:00	1.00	\$58.84	 
Greg Manning	Maintenance Work	26/09/2017	DEFAULT OPTION	11:45 - 12:00	0.25	\$0.00	 
					2.75	\$137.29	

Mobile Workgroup Management

As mentioned earlier, the Manage Workgroups screen has been re-designed to provide additional functionality to the Mobile user in charge of a team of users. New workgroups can then be created, renamed and users can be clocked on and off as per below:

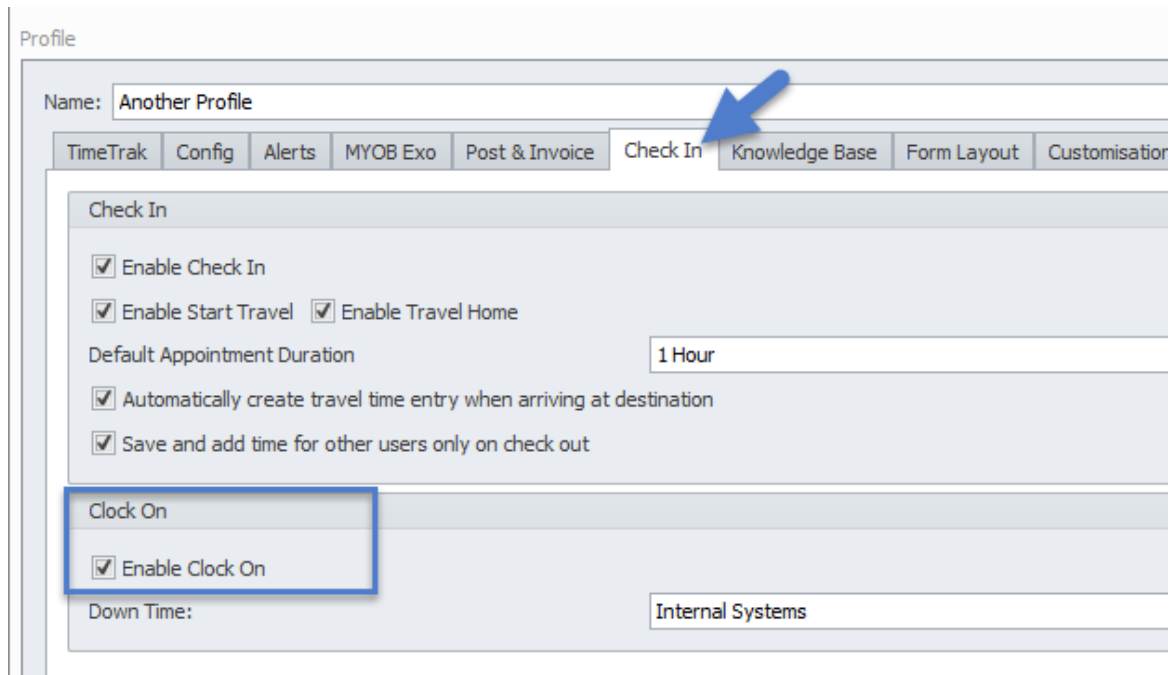


- [Edit selected workgroup name](#)

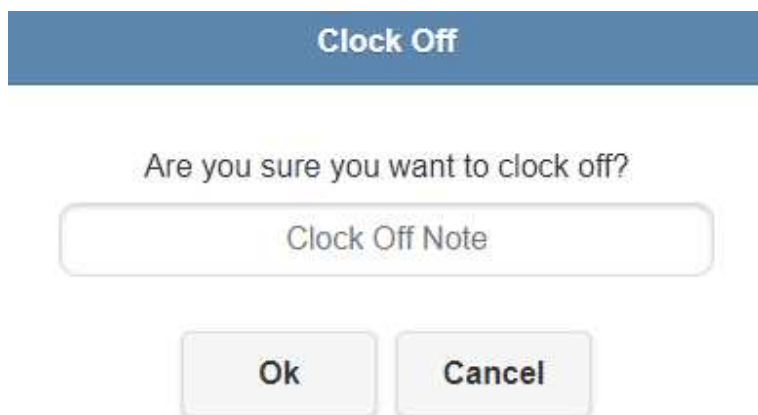
- [Create new Workgroup](#)

- [Clock Off](#)

This will only appear if clock on is enabled against the users profile as per below:



Clicking clock off against a user if they have left early prompts the below box to appear where the user can enter a clock off note which can be reported on.



Clicking clock off against the logged on user prompts the below icon which by default will tick on "Clock Off All Work Groups Users"

Clock Off

Are you sure you want to clock off?

Clock Off Note

Clock Off All Work Group Users

Ok

Cancel


Mobile users now have access to more information about users in their Workgroup than ever before via the Manage Workgroups screen as per below:

The screenshot displays the 'Manage Workgroups' interface for 'Tuesdays Team'. It lists five users with their current time entries and unallocated hours. A 'Choose an action' menu is open over the 'Harrison Williams' entry, showing options for 'Next Appointment', 'Appointment', 'Job', and 'Task'. Callout boxes point to various UI elements: 'Next Appointment Details', 'Current Time Entry', 'Check In', 'Clock Off', 'Manage', 'Next Appointment', 'Appointment', 'Job', 'Task', 'Users unallocated hours for the day and clocked on time (if clocked on is applicable)', 'TimeTrak Status Colour', and 'Users Day Completed'.


- **Current Time Entry**

The first line in larger font is the user's current time entry details.

If the time entry is assigned against a job the job icon will be displayed as per below:

 10149 - Maintenance Work (1 hours)

If the time entry is assigned against a task the task icon will be displayed as per below:

 10125 - Special May Deal (1 hours)

- **Next Appointment Details**

The second line of information under a user is the next appointment details for that user in the below format:

Job number, Job Title, Appointment Start Time, Appointment Duration.

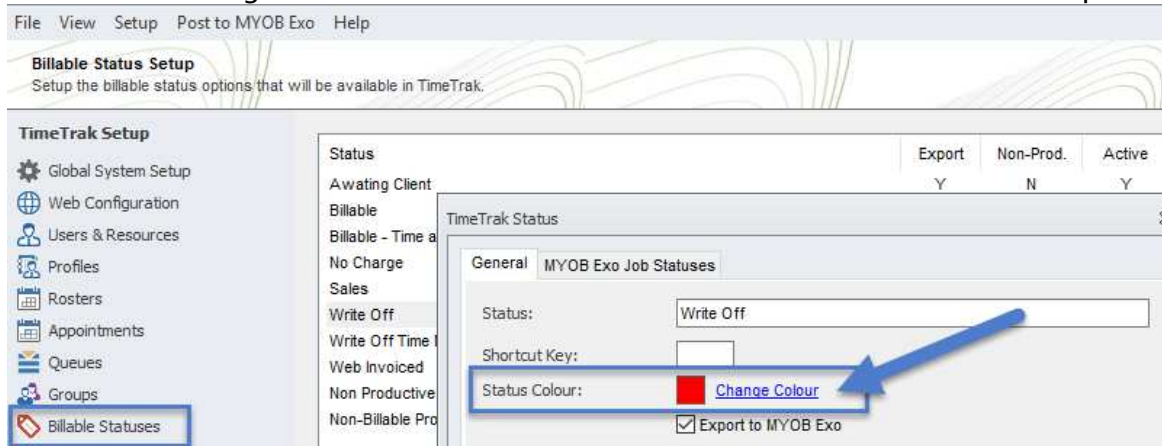
- **Users unallocated hours for the day and clocked on time (if clocked on is applicable).**

The third line of information under a user is the user's current allocated time for the day and their clock on status if applicable.

- **TimeTrak Status Colour**

This is the colour to indicate the status of the user's time entry.

This colour is set against billable statuses in the TimeTrak Administrator Console as per below:



- **Check In**

Against each user in the Manage Workgroups screen there is a new Check In button which will pop the below actions for the user to select from.

Choose an action	
Next Appointment	>
Appointment	>
Task	>
Job	>

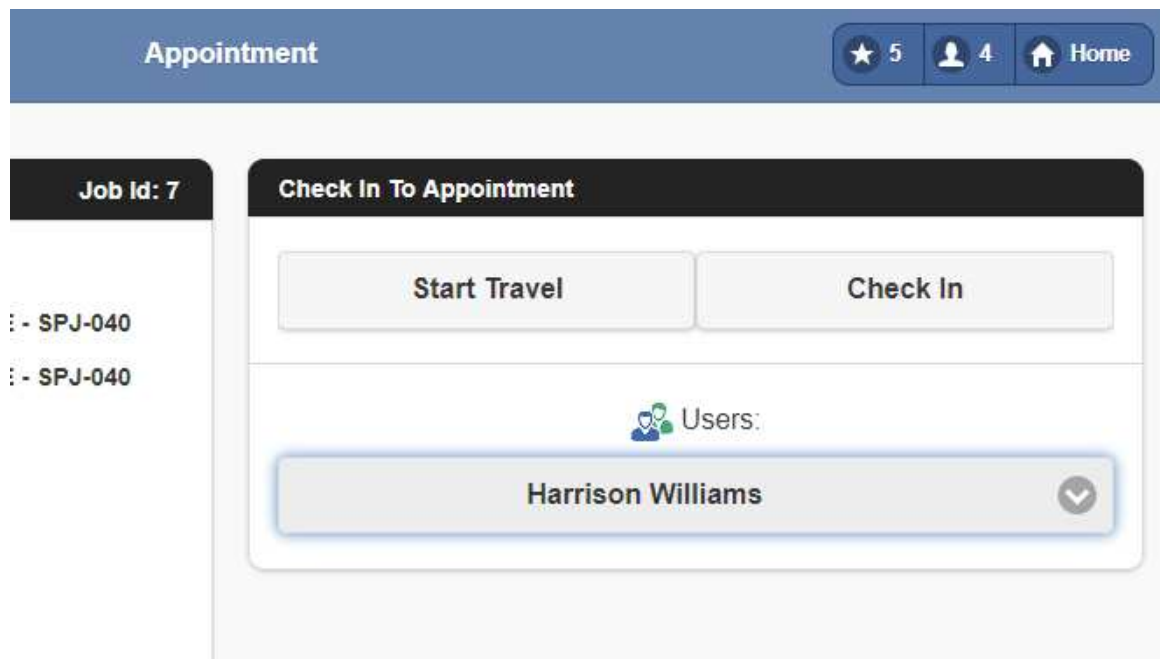
- [Next Appointment](#)

Next appointment will only appear if the user you have selected "check in" against has a future appointment in their calendar.

In the below example for Harrison Check in, Next appointment

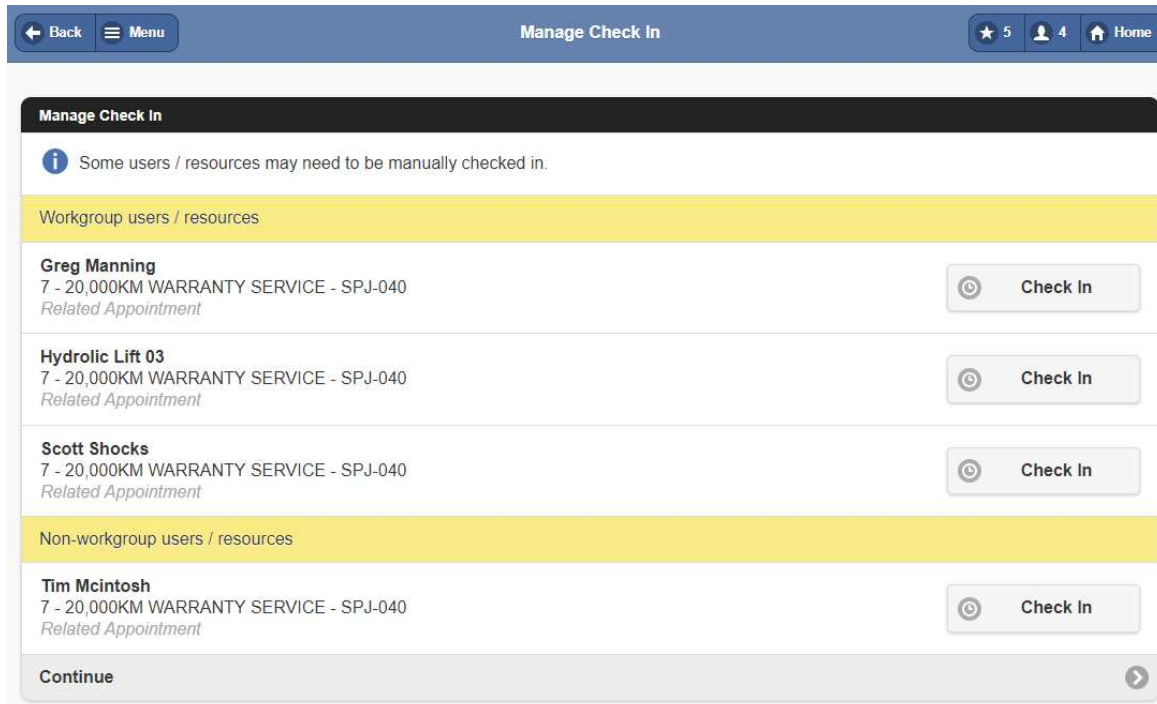


This takes the user to Harrison's next appointment which is for job 7, Warranty Service. In the Check In widget by default Harrison is already selected, check in

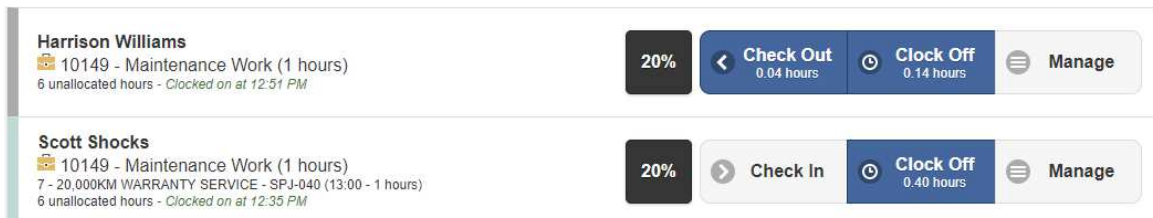


If the appointment has related appointments, the user will be taken to the Manage Check In screen as per below where they can see other users/ resources in their workgroup with related appointments as well as other users/ resources that have related appointments not in their workgroup.

Note: Other users/ resources with related appointments do not need to belong to one of the logged in users TimeTrak group(s) to be visible. However if the user/ resource does not belong to one of the logged in users TimeTrak groups they will be unable to action the user's appointment in anyway.



The user can now see that Harrison is checked into job 10149 and has the option to check Harrison out once he has completed his work.



- [Appointment](#)

This will divert to the user's appointment list

- [Task](#)

This will divert to the user's task list

- [Job](#)

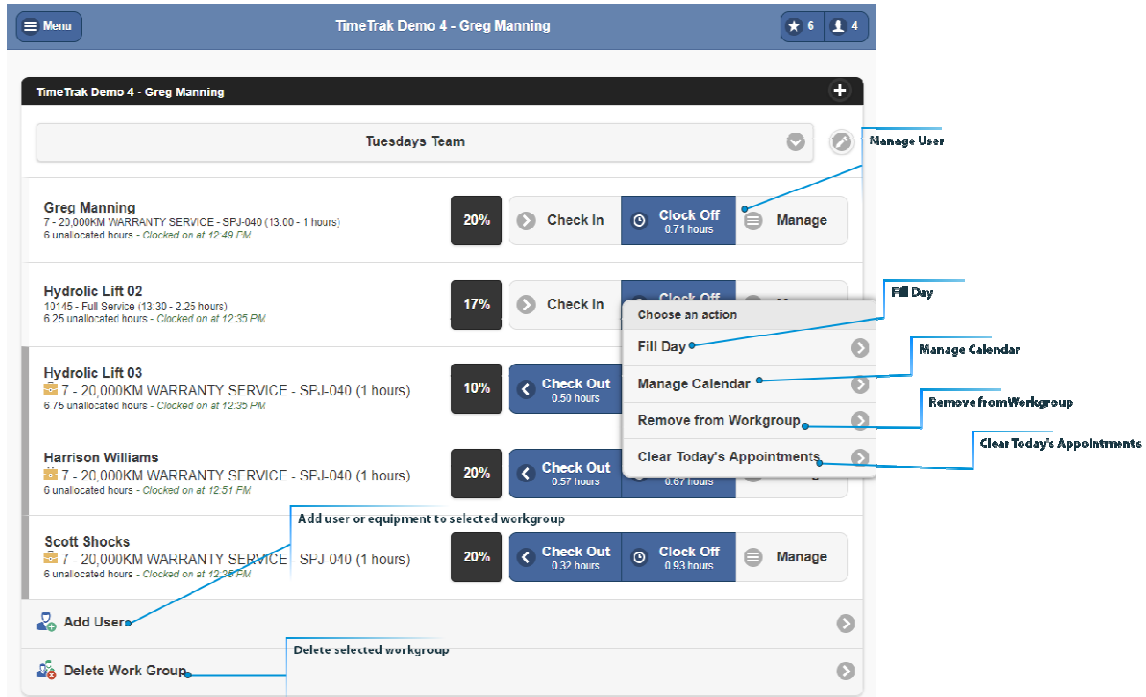
This will take the user to the job search screen where they can search by job and check directly into a job, if permissions allow.

- [Users Day Completed](#)

This is the percentage of the day that is completed for this user based on their roster. Clicking on this button will take the logged in user to that user's calendar where they can

complete their time sheet for the day.

The workgroup can be deleted, additional users or equipment can also be added and removed from the workgroup as per below.



- **Add user or equipment to selected workgroup**

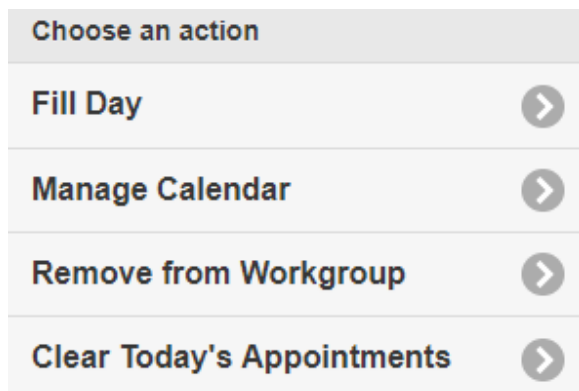
Allows user to add additional users or resources to the selected workgroup.

- **Delete selected workgroup**

Deletes the selected workgroup.

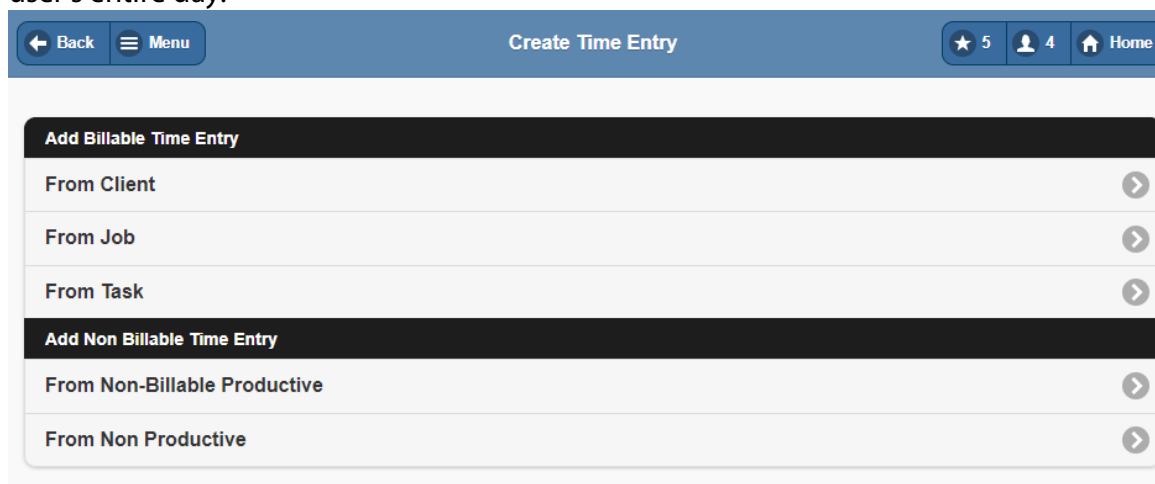
- **Manage User**

Clicking Manage against a user will pop the below options.



• [Fill Day](#)

Fill day takes the user to the time entry screen and allows them to create a time entry for the user's entire day.



• [Manage Calendar](#)

This option will only appear if the logged in user does not have the below profile setting "Hide Other Users Calendars (TimeTrak Mobile)" enabled.

If this is not enabled and Manage Calendar is selected the logged in user will be redirected to the selected users calendar.

Profile

Name:

TimeTrak **Config** Alerts MYOB Exo Post & Invoice Check In Knowledge Ba

- Coordinates Required
- Allow Overlapping in Calendar
- Convert Appointment to Time Entry
- Copy Appointment Details To Narration
- Enable Appointment Acceptance
- Disbursement Narration Required
- Allow Task Notifications To Be Sent To Self
- Email Contact On Task Completion
- Allow Timesheet Verification
- Allow Job Budget Notifications
- Allow Request PO No.
- Allow Customer Approval
- Restrict Job Visibility By User
- Restrict Job Visibility By Group
- Restrict Job Visibility By Branch
- Limit Job Visibility to Job Manager (mobile only)
- Enable Task Acceptance
- Edit Providers
- Show Appointment Statuses
- Show Appointment Categories
- Order Job Search Results In Mobile By Due Date
- Redirect After Time Entry Created
- Hide Other Users Calendars (TimeTrak Mobile)

- **[Remove from Workgroup](#)**

Removes the selected user from the selected workgroup.

- **[Clear Today's Appointments](#)**

This option will only appear if the user has scheduled appointments for today and the logged in user has the ability to delete appointments.

On clicking Clear today's appointments all today's appointments for this user will be deleted.