



TimeTrak  
Improved Timeline and Group  
Scheduling Features

2019

# TimeTrak Improved Timeline and Group Scheduling Features

In TimeTrak 4.0, Queues were added as a feature.

A queue can be set so that queue data (jobs/tasks) or clients and serviceable units (if they have a default job) can be populated automatically by a SQL statement or these queues can be managed manually by users adding and removing items. For more information about queues click [here](#).

In TimeTrak 19.1 we have added to queue functionality by allowing this queue data to display in a timeline calendar.

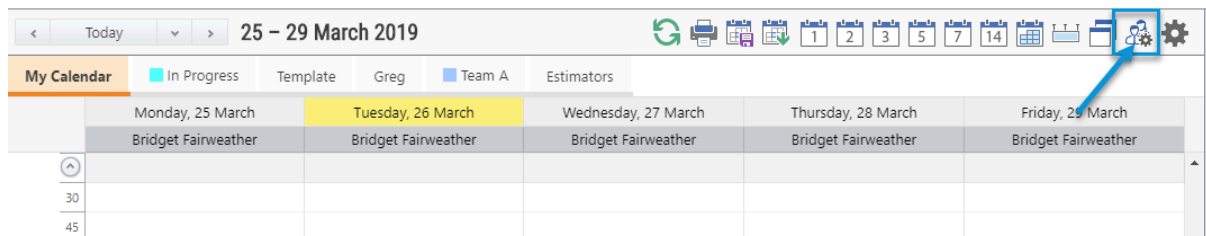
This provides schedulers to review the activity scheduled against these items and quickly schedule resources to the job/ task instead of our previous scheduling method of jobs/ tasks being scheduled to resources.

## How to set up a queue calendar in TimeTrak

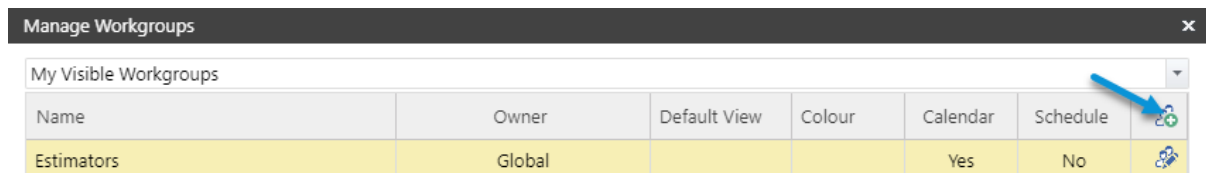
**Note: The Queue that you want to see in the calendar, must be set up in the TimeTrak Administrator Console and enabled at the Profile level before it can be setup in a calendar.**

Queues are useful if your scheduler would like to review a list of jobs to be completed. For example, a list of the jobs with the due date of this week or a list of tasks for a long project, etc.

To set enable a queue in a calendar, go to workgroup setting as per below:

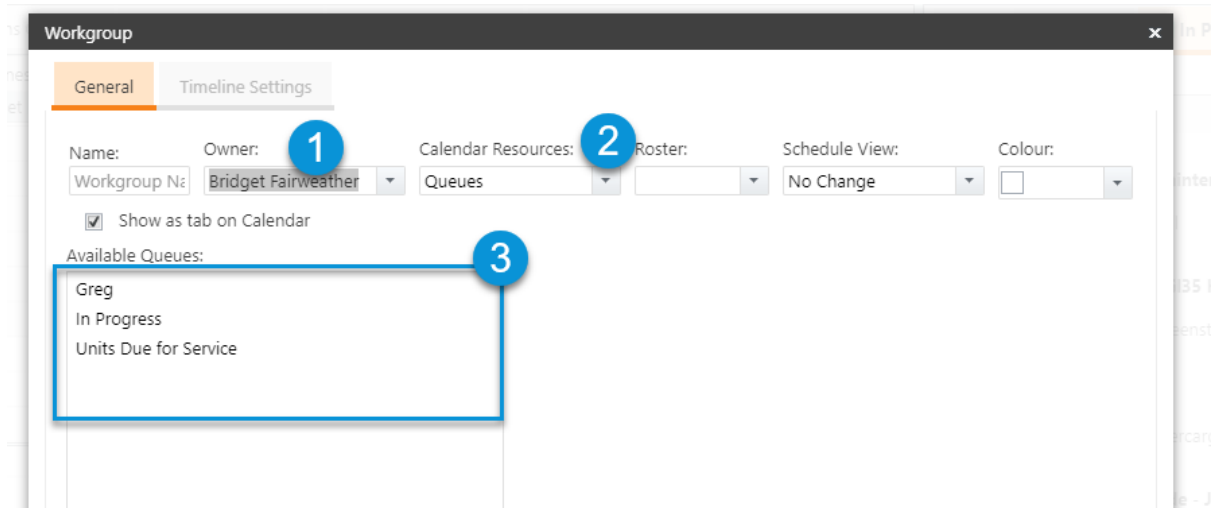


### Add new workgroup



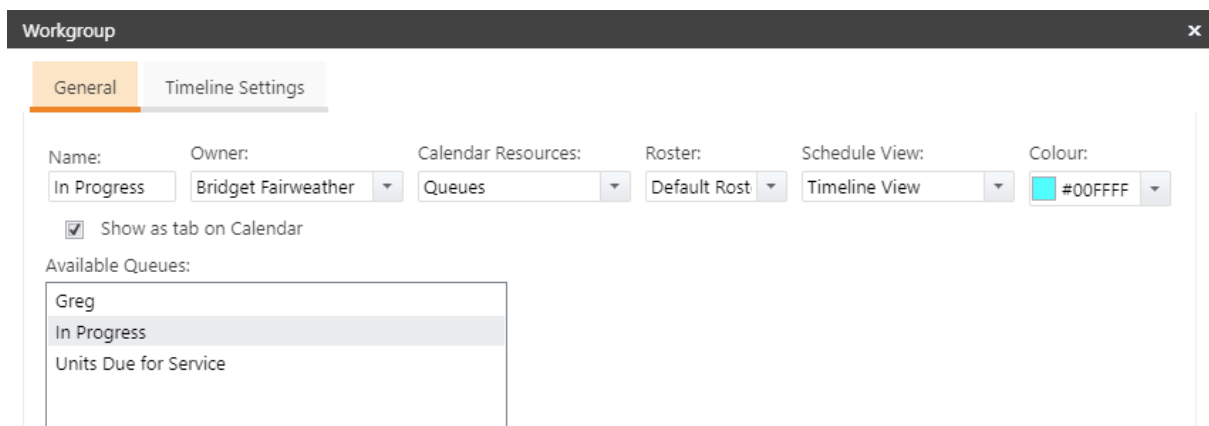
Ensure the "Owner" is assigned and "Calendar Resources" is set to "Queues".

Once the calendar resource is set to "queues" select the applicable queue as per point three below:



After the queue has been specified, select “Timeline View” in the Schedule view drop down you can specify a colour against the workgroup which will display on the workgroup tab in your calendar.

In the roster drop down specify a roster – this will set the default time range when double clicking on a day in the timeline view.



You will see all your visible workgroups in the Manage Workgroups screen including the queue you just added.

By default a user’s visible workgroups will be ones where they are the owner of the workgroup or global workgroups (which are available to all users).

There is also the below profile setting which when enabled displays workgroups that belong to users in your TimeTrak groups.

Profile

Name: **Admin Profile**

TimeTrak **Config** Alerts ERP Post & Invoice Check In Knowledge Base Form Layout Customisations Checklists Reports Queues Us

**Visibility**

- Can View Private Clients
- Can View Private Suppliers
- Restrict Client Visibility By Job Visibility Settings
- Restrict Job Visibility By Active Status
- Restrict Job Visibility By User
- Restrict Job Visibility By Group
- Restrict Job Visibility By Branch
- Restrict Job Visibility to Job Manager
- Show All Workgroups For My Groups**
- Show Scheduling Template Calendar

**Notifications**

**Permissions**

- Convert Appointment to Time Entry
- Can Lock Task
- Can Lock Appointment
- Can Edit Locked Appointment
- Can Edit Locked Time Entry
- Can Edit Posted Time Entry (Timesheet Manager Only)
- All Time Entries must come from a Task
- Can Add Time or Check In To Other Users Task
- Edit Providers
- Allow Disbursements On Completed Tasks
- Limit Disbursements By Available Stock in Users Default Stock Location
- Location Coordinates Required on Save of Jobs

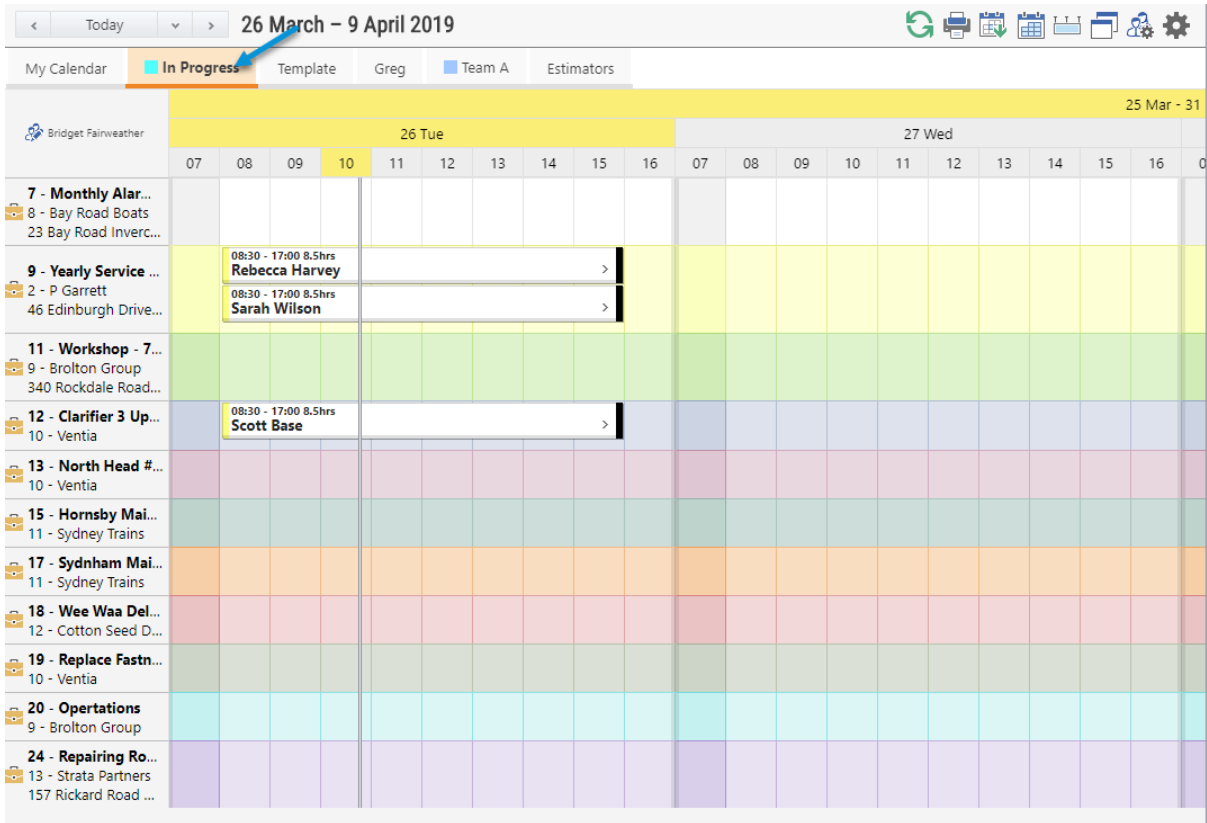
As per the below example, Bridget also has access to Greg and "Daily Schedules" workgroup.

**Manage Workgroups**

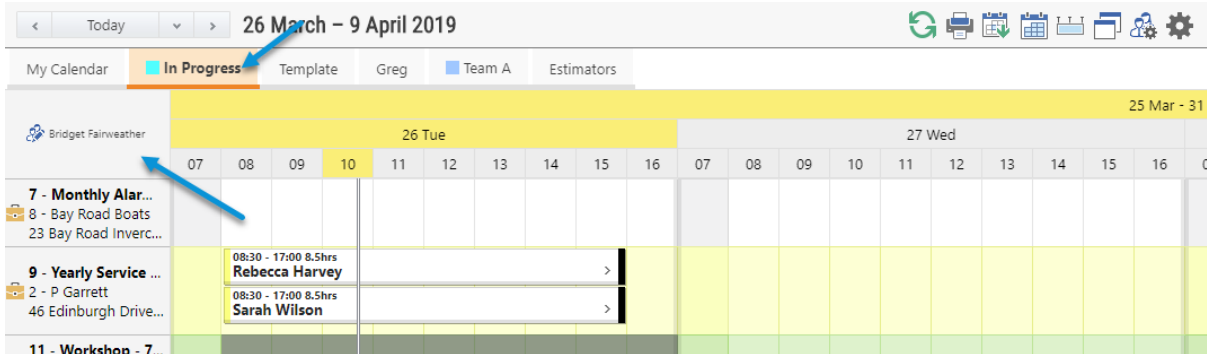
My Visible Workgroups

Name	Owner	Default View	Colour	Calendar	Schedule	
Estimators	Global			Yes	No	
<b>In Progress</b>	Bridget Fairweather	Timeline		Yes	No	
Template	Daily Schedule			Yes	No	
Greg	Bridget Fairweather			Yes	No	
Team A	Greg Manning	Week		Yes	No	

Back in the calendar, you will now see the new workgroup tab "In Progress" which is populated with the queues data:



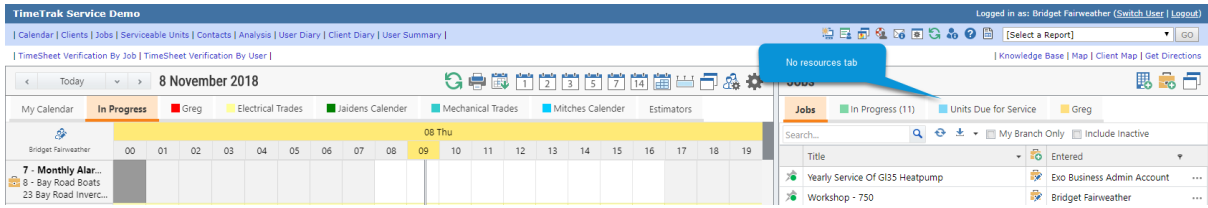
The selected workgroups settings can be accessed and managed quickly by selecting the workgroup from the top left hand corner as per below (instead of accessing this information by the "Manage Workgroups" icon and selecting the applicable one from the list).



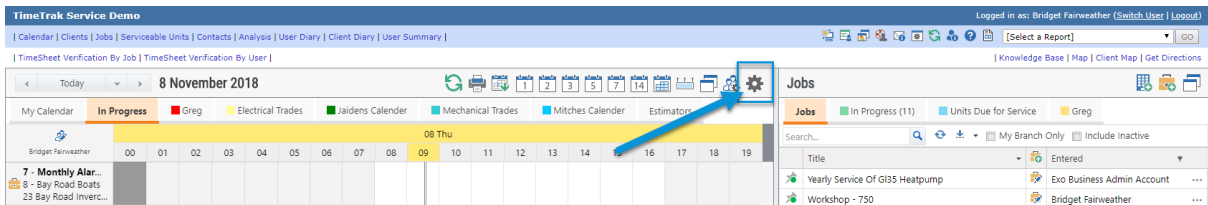
### Add Resources Panel

Another new setting that compliments queue data in timeline calendars is the ability to have a resource panel on the right panel. With this, you can quickly add resources against the job/task's in the calendar.

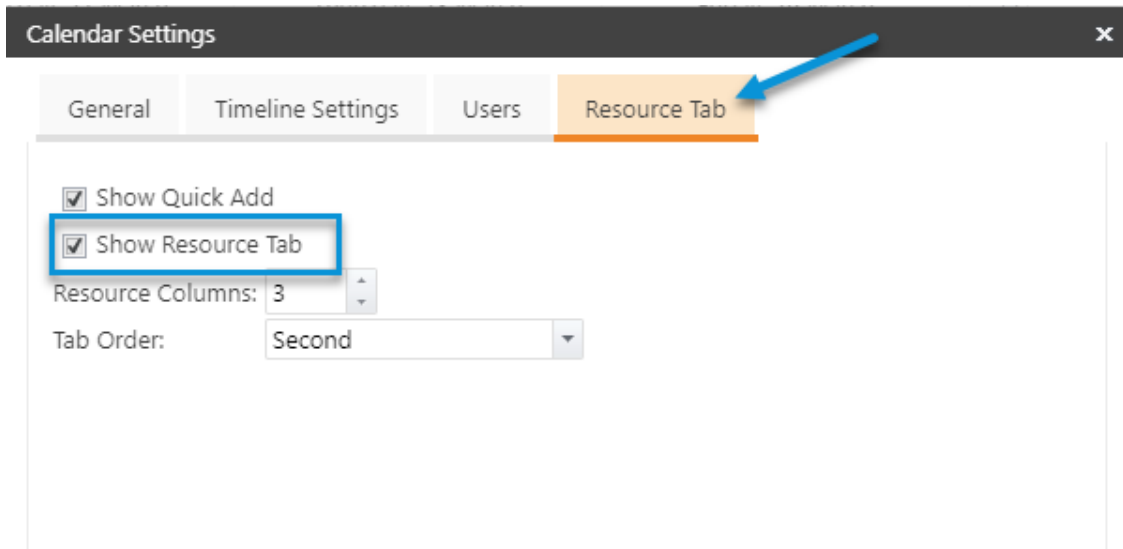
As per example below, you can see there is no resource tab on the right panel.



To enable this feature, select “Calendar Settings” as per below:



Select the resource tab and enable “Show Resource Tab” as per below:

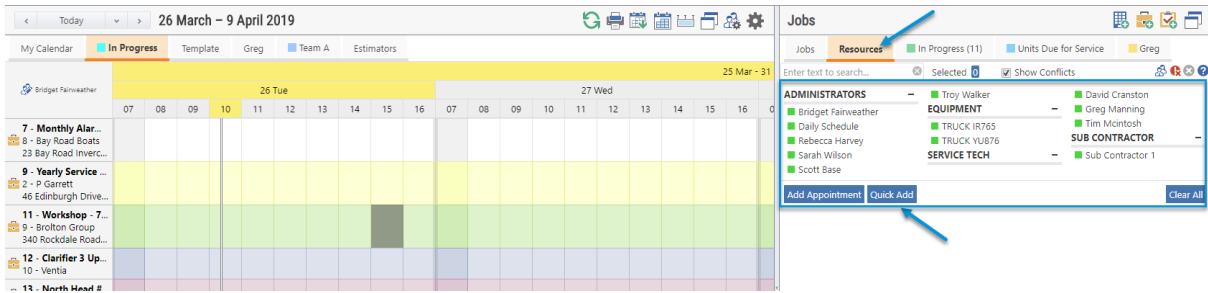


-If “**Show Quick Add**” is enabled users can create appointments quickly without the appointment screen loading (appointment defaults will be passed into the appointment).

-**Resource Columns** defines how many columns of users are displayed in the resource panel.

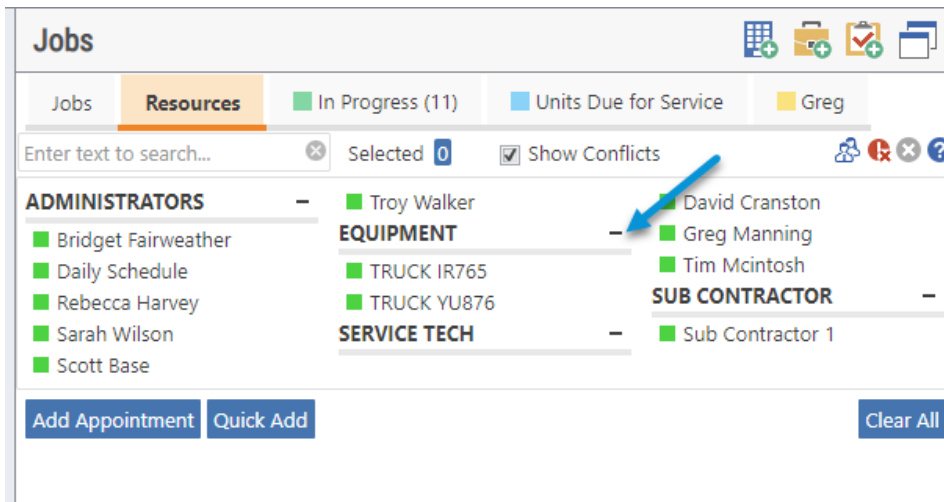
-**Tab Order** defines where in resource panel sits in your job/task/queue tabs.

After you have saved these settings then the resource tab will be available on the right panel in the position specified in settings with the amount of resource columns specified.



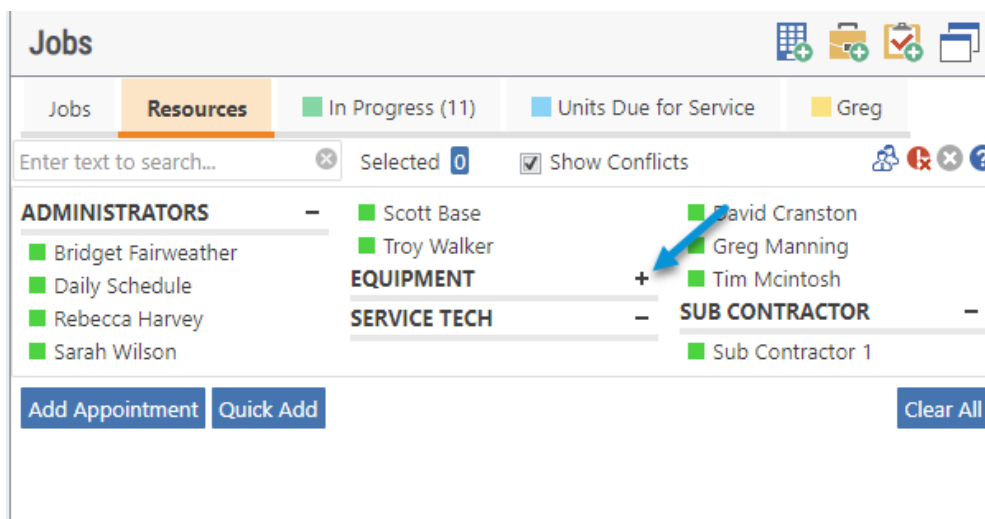
Groups can be minimised so that only users that are relevant will display. This view will cache to the users settings.

As per below If the group "equipment" was of no relevance to the scheduler they could minimise this by clicking the minus icon as per below:



This collapses the resources in this group as per below so they are not available by default, these can view accessible again simply by clicking the plus icon:

This is great for customers who have large resource lists and only want to see a select group by default.



## Show Conflicts

Adding to the resource panel functionality is the ability to display conflicts.

When this setting is enabled and a time period is selected, the resources that are already scheduled for this time period display with a red block beside them to indicate this.

This provides the ability to quickly see visually if any resources are available to be booked and who these resources are.

The screenshot shows a resource scheduling interface for the period 26 March to 31 March 2019. The calendar view on the left shows various jobs scheduled across days. The right-hand 'Resources' panel lists several categories: ADMINISTRATORS (Scott Base, David Cranston), BRIDGET FAIRWEATHER (Troy Walker, Greg Manning), EQUIPMENT (Daily Schedule, Tim McIntosh), SERVICE TECH (Rebecca Harvey, Sarah Wilson, Sub Contractor 1), and SUB CONTRACTOR 1 (Sub Contractor 1). A red block is visible next to 'Scott Base' in the ADMINISTRATORS list, indicating a conflict. A blue arrow points to the 'Show Conflicts' button in the top right of the Resources panel.

When this setting is enabled there is still the ability to book these already scheduled users (as long as their profile has "Allow overlapping in calendar enabled").

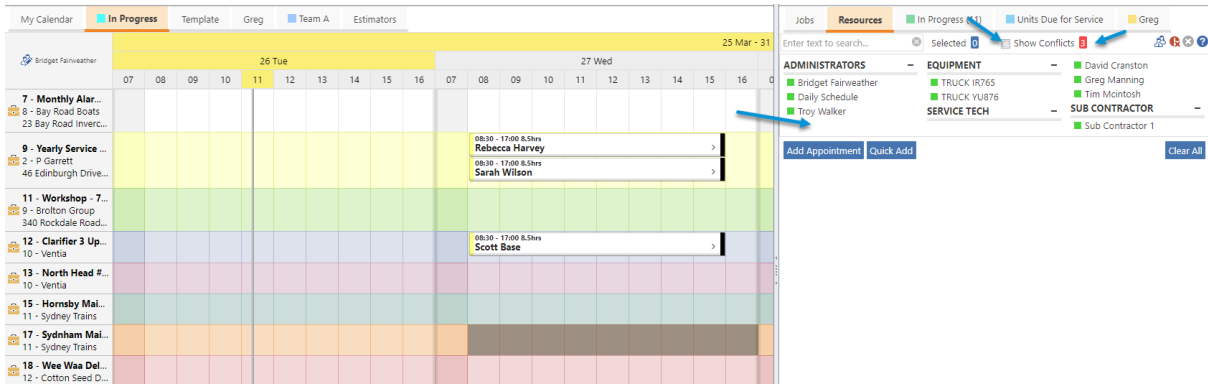
As per below, hovering over the user will display information of the conflicting appointment/ time entry so the scheduler can make an informed decision prior to double booking the resource.

This screenshot is similar to the previous one but shows a tooltip for the 'Conflict: 08:30 - 17:00 P. Garrett - Yearly Service Of GB's Heatpump' entry. The tooltip text reads: 'Conflict: 08:30 - 17:00 P. Garrett - Yearly Service Of GB's Heatpump. The next available time slot is on 28/03/2019 at 08:30'. A blue arrow points to the tooltip, and another blue arrow points to the 'Show Conflicts' button in the Resources panel.

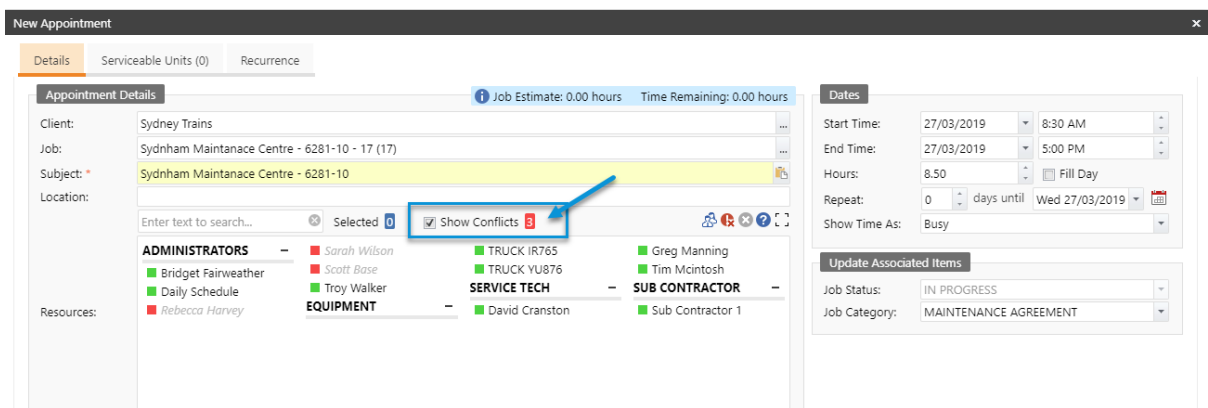
If the scheduler would prefer not to have resources that are already scheduled display in the resource panel this setting can be disabled.

As per below the number of conflicts will be displayed but the users that have a conflicting appointment will no longer be displayed in the resources list to be selected:

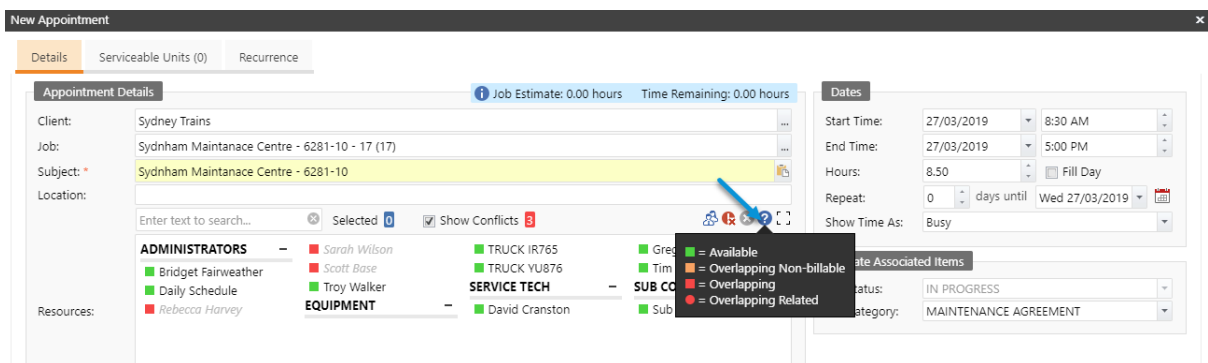




This same function is also available in the Appointment Screen as per below:

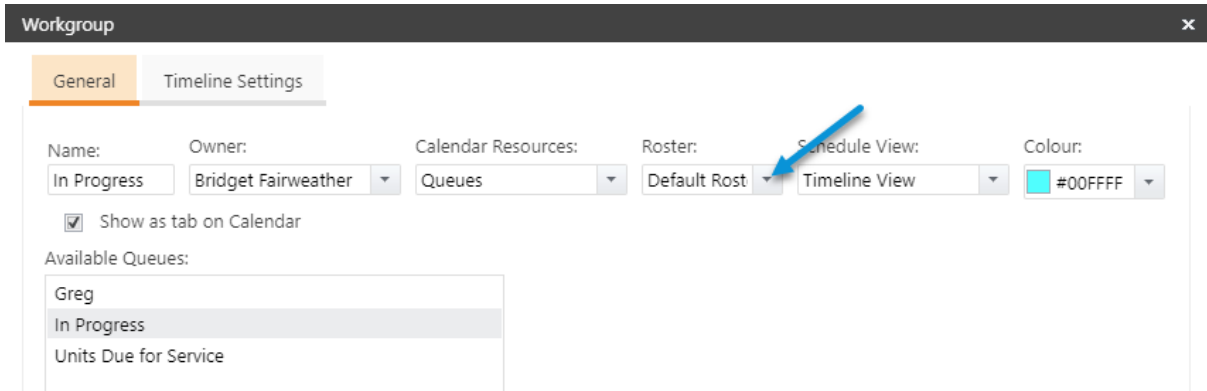


Hovering over the question mark icon will also display what the different colours and shapes indicate again to assist schedulers with whether or not they should be creating an overlapping appointment for the resource(s).

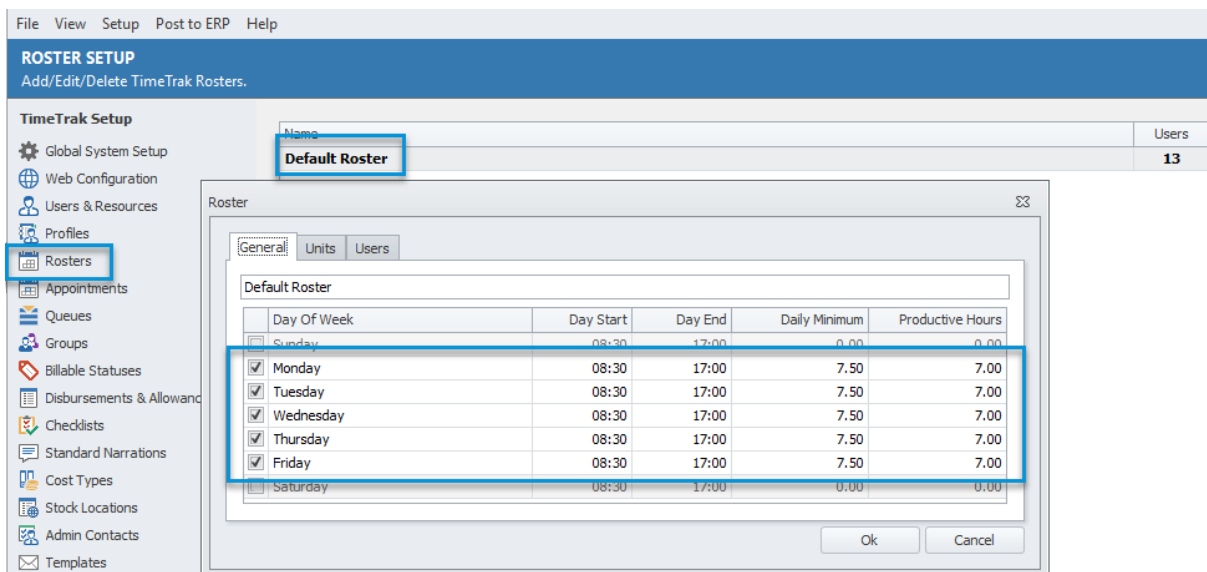


## Default Day Scheduling

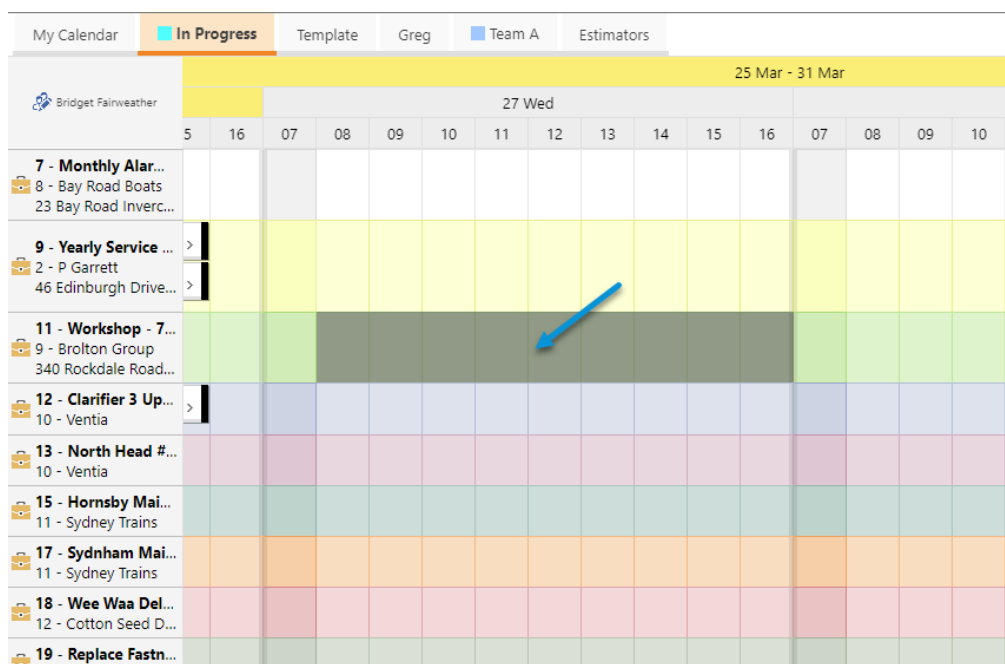
As mentioned earlier a roster is assigned to a queue work group. In this example the "In Progress" workgroup has been assigned to the "Default Roster"



The Default Roster is set as per below in the TimeTrak Administrator Console



When double clicking a day in the In Progress Calendar as per below, the time range specified in the roster is automatically selected:



This provides the ability to quickly create “full day” appointments for users from the timeline view.

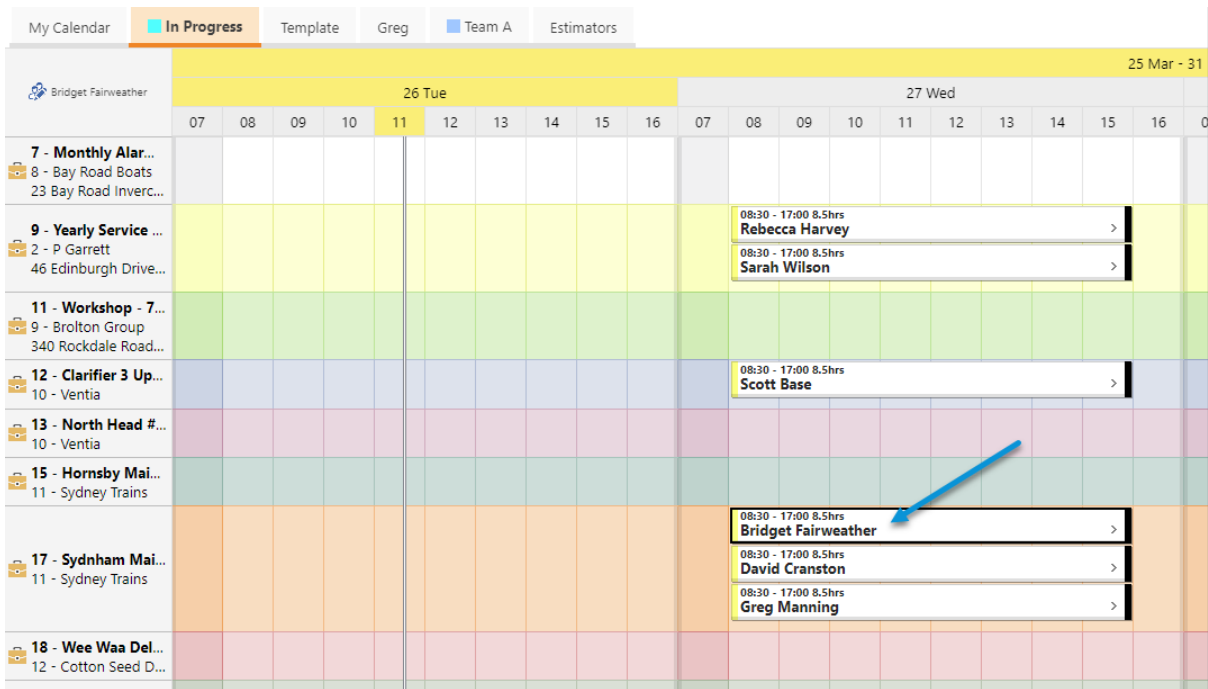
### Quick Add Appointment

As mentioned previously, if “Show Quick Add” is enabled against the resource settings users are able to create appointment(s) without the appointment screen loading.

In the below example Bridget, David and Greg need to be scheduler against job # 17 on Wednesday the 27<sup>th</sup> of March.

This can be done by double clicking Wednesday in the timeline view, selecting these three users from the resource panel and clicking “Quick Add” as per below:

This will create the appointments as per below, if appointment category and statuses are setup in your database these defaults will be passed into the appointments.

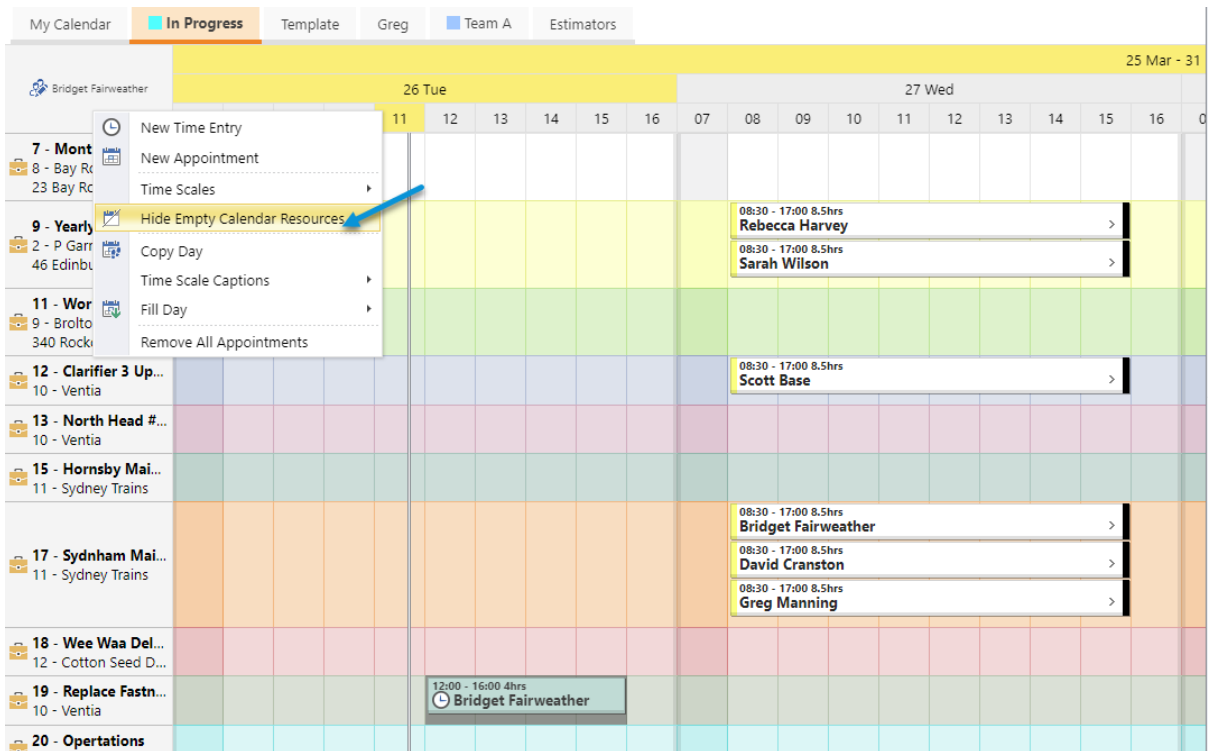


### Hide/Show Empty Calendar Resources

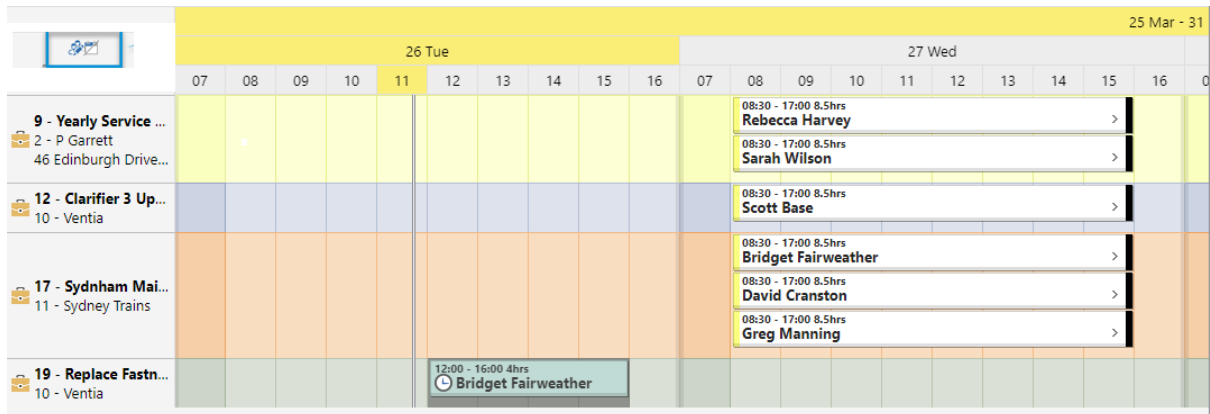
To further enhance the timeline queue scheduling there is the ability to display only queue data, which has appointments or time entries against them in the current time line view.

In this example only jobs 9,12,17 and 19 have appointments or time entries against them.

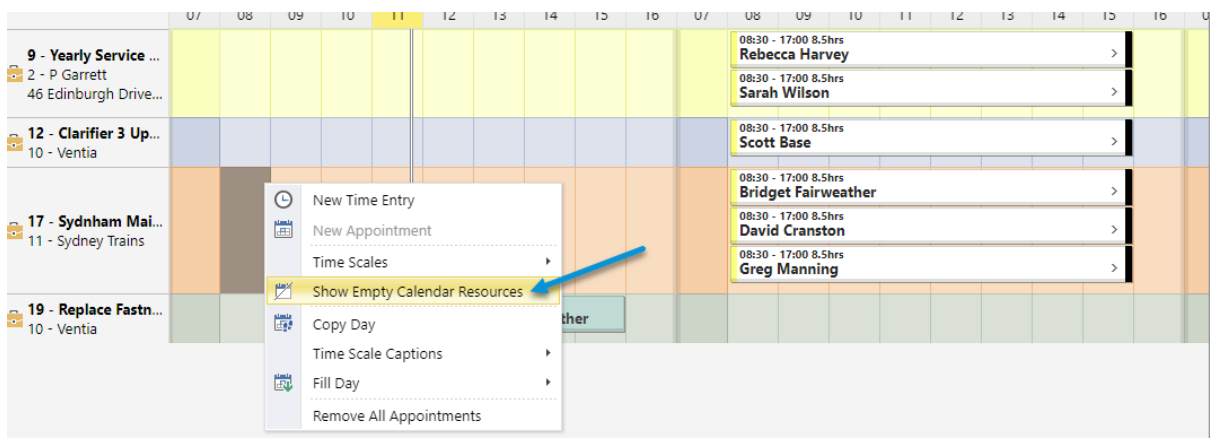
Users can right click and select **"Hide Empty Calendar Resources"** as per below



Which will then only display the queue data (jobs in this example) that have appointments or time entries against them allowing schedulers to review data that has been scheduled instead of seeing data that is yet to be scheduled.

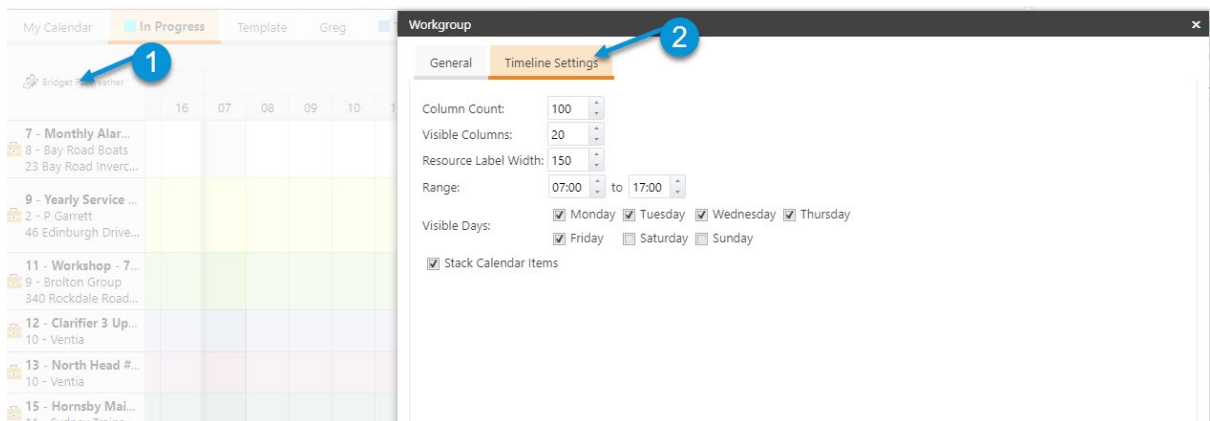


Users can simply right click and select "Show Empty Calendar Resources" to get all data in the queue back in the calendar view.



## Time Line Settings

While timeline settings are set at a user level under Calendar settings, in 19.1 there is also the added ability to save time line settings against a workgroup as per below:



**Column count** – This is the amount of columns that can be viewed within the timeline view.

*Note: there is a maximum of 100*

**Visible Columns** – This is the amount of columns that can be viewed within the timeline view without the need to scroll.

**Resource Label Width** – This is the width of the resource label

*Note: Resource label is the label that details the queue data.*

*The data that displays in the resource label is the same data that displays in the queue itself.*

*This data can be customised at a profile level as per our below tip of the week: (Job, Queue List).*

<https://timetrak.co.nz/blog/category/general/customisations-of-tool-tips>

**Range** – This is the time range you wish to see in the timeline view.

**Visible Days** – Select the days you wish to see in the timeline view

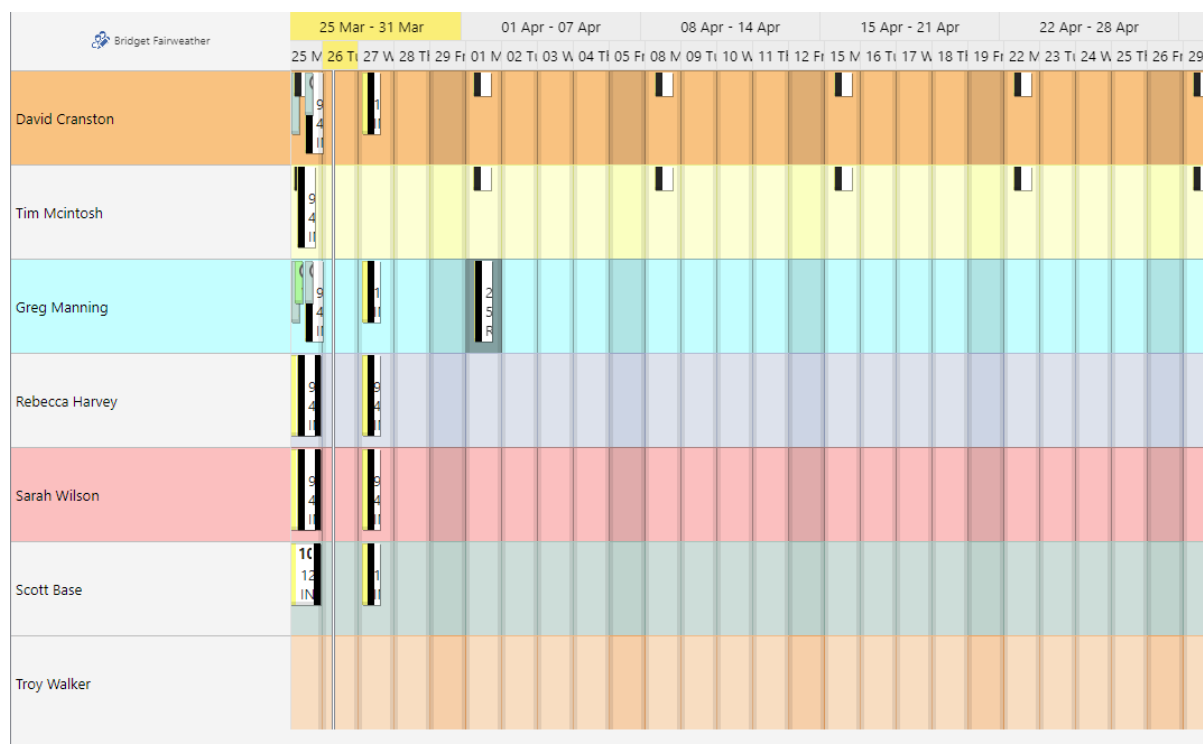
**Stack Calendar Items** – See below

### Stack Calendar Items

Stack Calendar Items is yet another setting to enhance timeline scheduling.

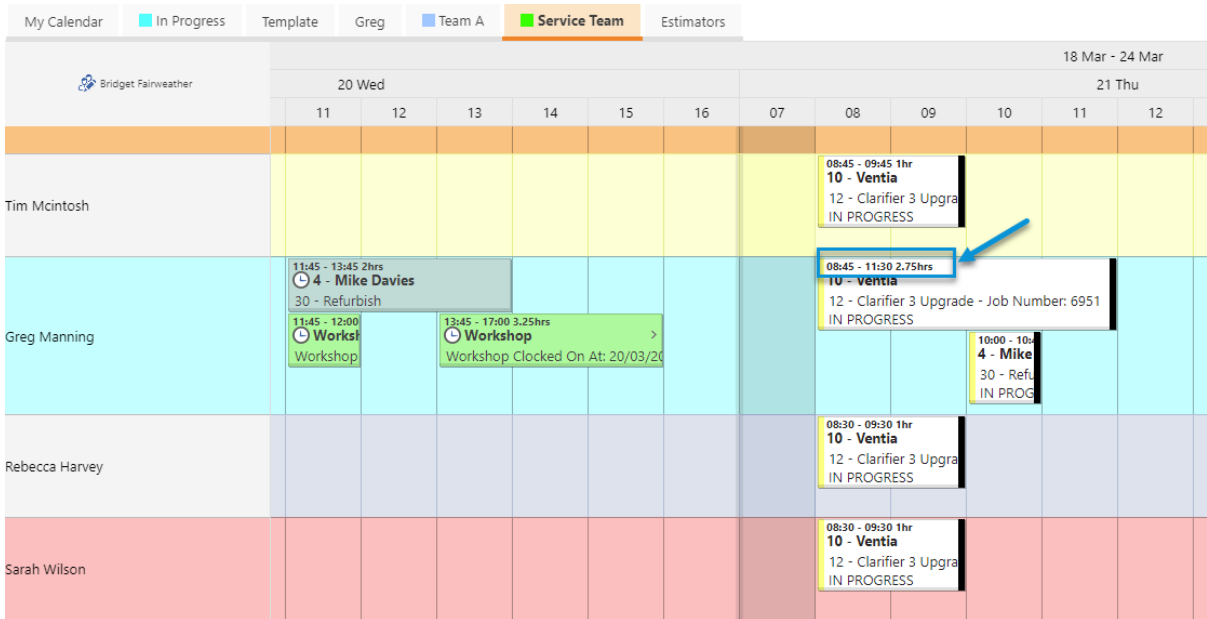
As per the rest of the timeline settings, this is available at a user level under Calendar Settings as well as against individual timeline workgroups.

Scheduled items can be hard to view when looking at data on a day by day basis, see below example without Stack Calendar Items enabled:

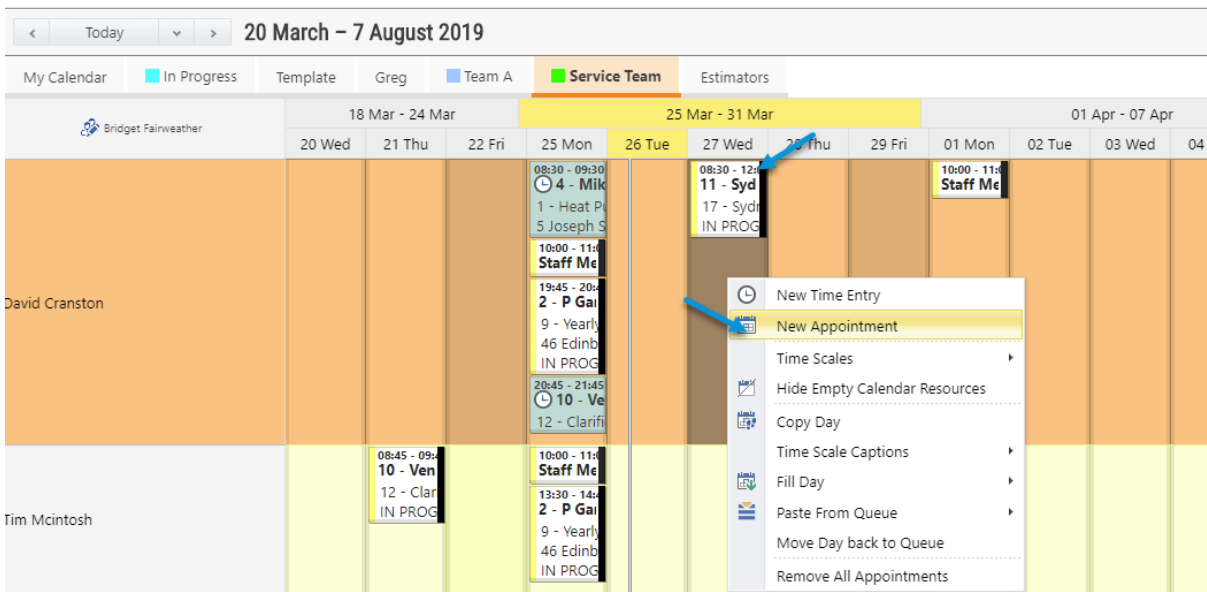


If this setting is enabled as per below:





When selecting “New Appointment” against a user in a timeline view set to “day view” where the user already has an appointment scheduled for the day as per below:



By default the appointments start time will be the time of the last appointment for that user in this case 12pm.



## Time Scale Options

Many customers have the same workgroup configured with different time scale and column counts to view their data in different ways.

For example: If the user wanted to see the above "Service Team" data in more detail, they could change the time scale options by right clicking and selecting these as per below:

The screenshot shows a Gantt chart for a 'Service Team' with a context menu open. The menu options are:

- New Time Entry
- New Appointment
- Time Scales** (highlighted)
- Hide Empty Calendar Resources
- Copy Day
- Time Scale Captions
- Fill Day
- Paste From Queue
- Move Day back to Queue
- Remove All Appointments

On the right side of the menu, the following time scales are listed with checkmarks:

- 15 Minutes
- 20 Minutes
- 30 Minutes
- 1 Hour
- 2 Hour
- 4 Hour
- Day
- Week

Blue arrows in the image point to the 'Time Scales' option in the menu and the 'Week' label in the top right corner of the chart area.

## TimeLine Scroll

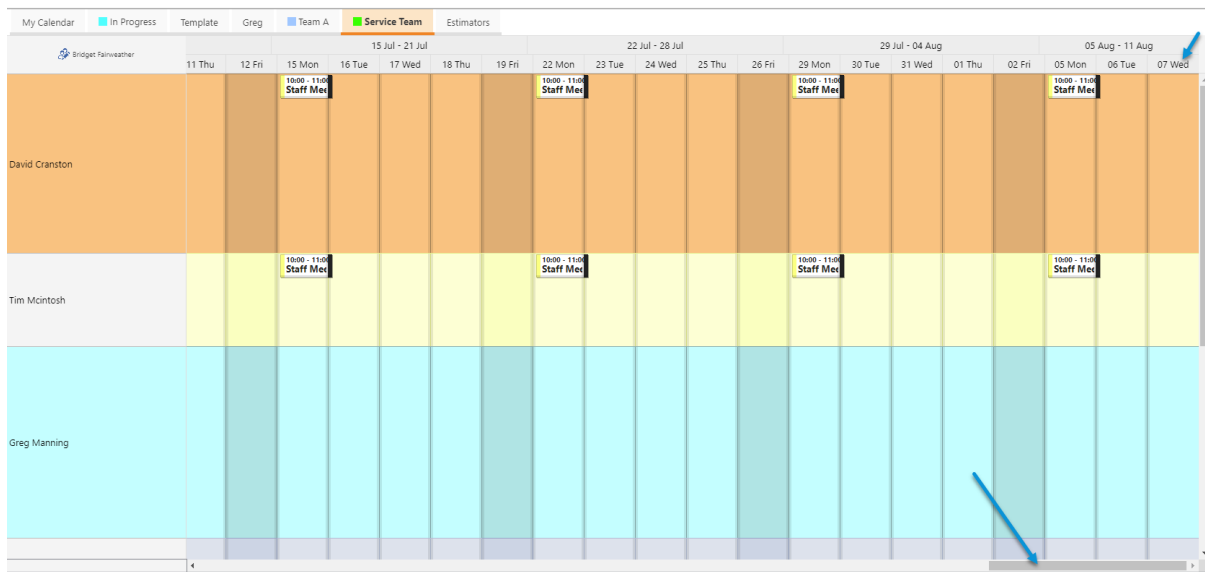
Again, to enhance timeline scheduling there is now the ability to "scroll" the time line.

As per the below example the scroll bar is available down the bottom of the screen and the user can scroll out until the 3<sup>rd</sup> of April.

The screenshot shows the same Gantt chart as above, but with a scroll bar visible at the bottom. A blue arrow points to the scroll bar, indicating its function.

The scroll allows you to see up to 100 columns (this is defined in the workgroup timeline settings).

If there was a need to see further than the 3<sup>rd</sup> of April the time scales could be changed down to a day view which allows for more columns and provides the ability to scroll out to the 7<sup>th</sup> of August as per below:

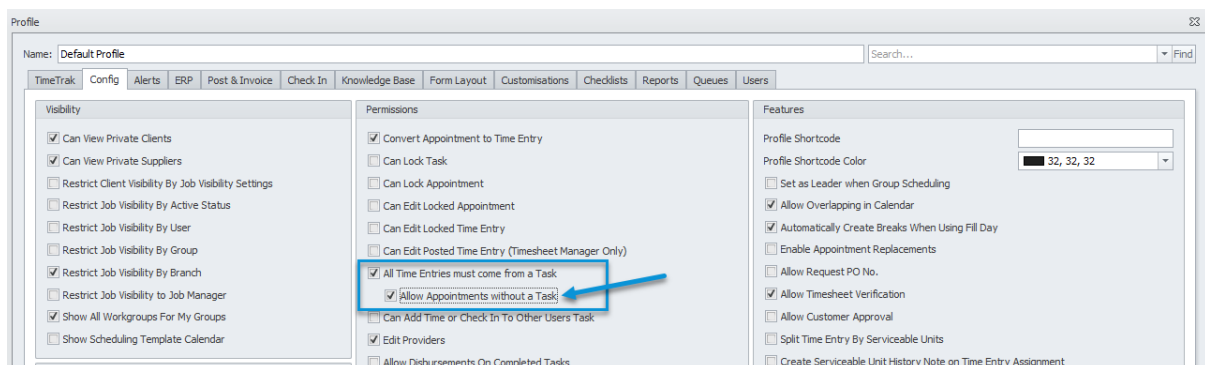


Queue timeline scheduling against a job (project) but all time must come from a task.

Many of our customers use Tasks within TimeTrak as a way of breaking down “project” work against a job. In order for this to work effectively there is a profile setting which can be enabled that requires users to assign all their time against a task instead of directly to a job.

These customers required the ability to schedule users directly against the job (project) using the above queue timeline view and resources tab.

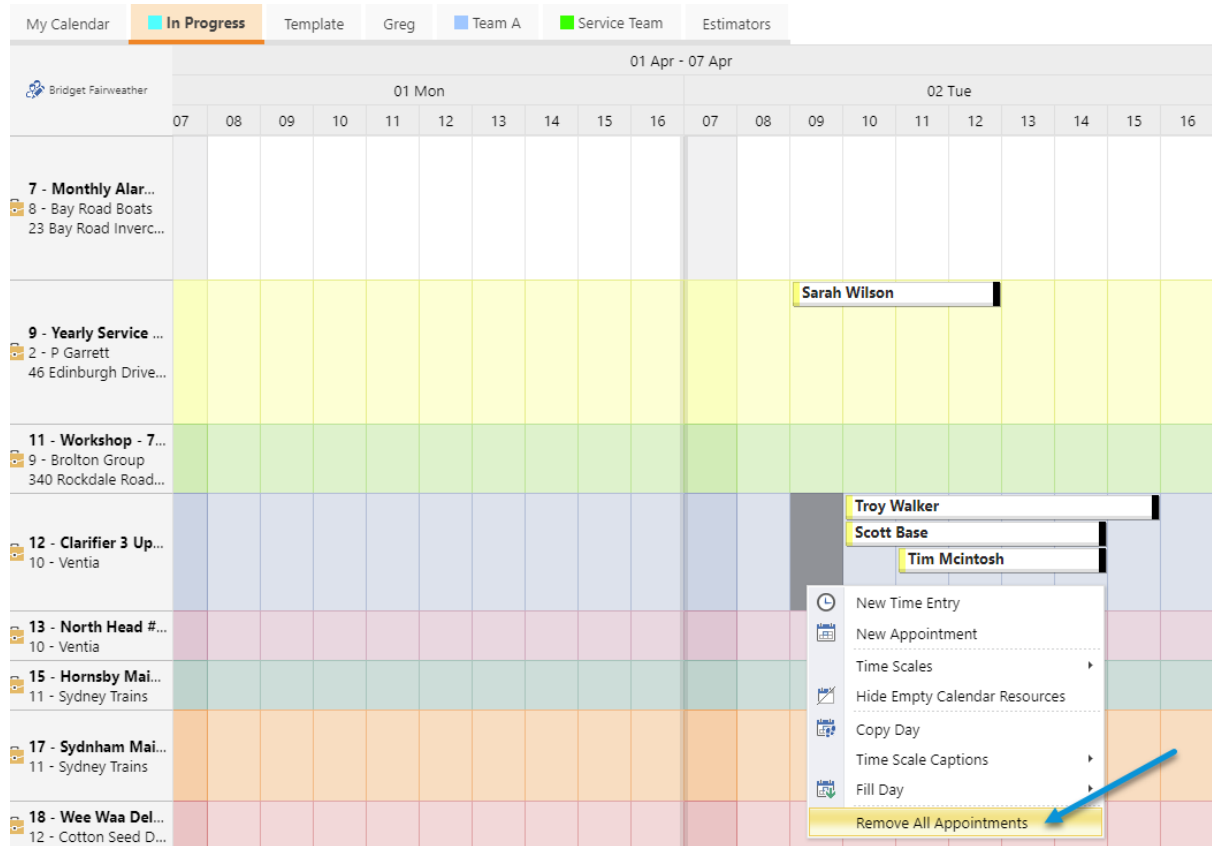
This provides their account managers and schedulers the ability to schedule resources accordingly and review their resource capacity at a “project” level whilst users are still required to assign all time against tasks when the below two profile settings are enabled:



For more information on this feature click [here](#)

## Remove All Appointments

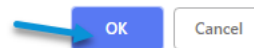
Remove all appointments allows schedulers to remove all appointments against a job for a day. To do this right click and select "Remove All Appointments" as per below:



The screenshot shows a calendar interface with a sidebar on the left listing jobs. The main calendar area displays a grid for the dates 01 Mon and 02 Tue. A right-click context menu is open over the calendar grid, listing various actions. The 'Remove All Appointments' option at the bottom of the menu is highlighted with a yellow background and a blue arrow pointing to it. The sidebar jobs include: 7 - Monthly Alar..., 8 - Bay Road Boats, 9 - Yearly Service..., 11 - Workshop - 7..., 12 - Clarifier 3 Up..., 13 - North Head #..., 15 - Hornsby Mai..., 17 - Sydnham Mai..., and 18 - Wee Waa Del... The calendar grid shows colored blocks for these jobs, with a resource name 'Sarah Wilson' visible in the top right area.

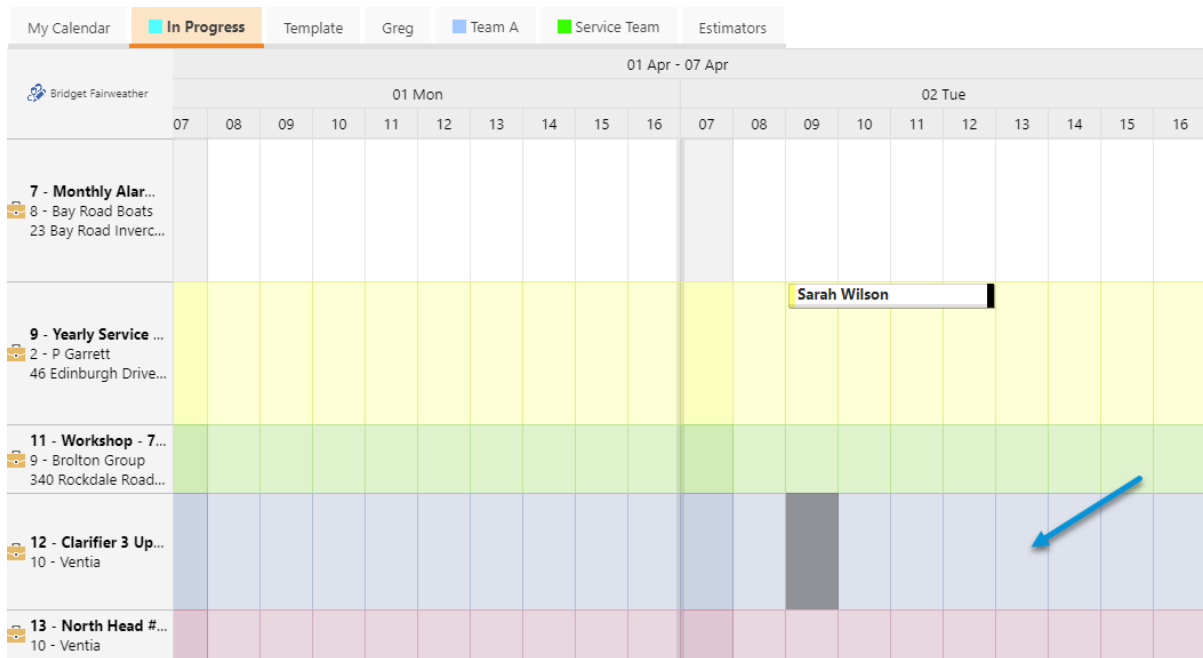
The below pop up will appear; click "Yes" if you wish to continue:

Are you sure you want to Remove All Appointments from day?



This will delete all the appointments against this job for the day as per below.

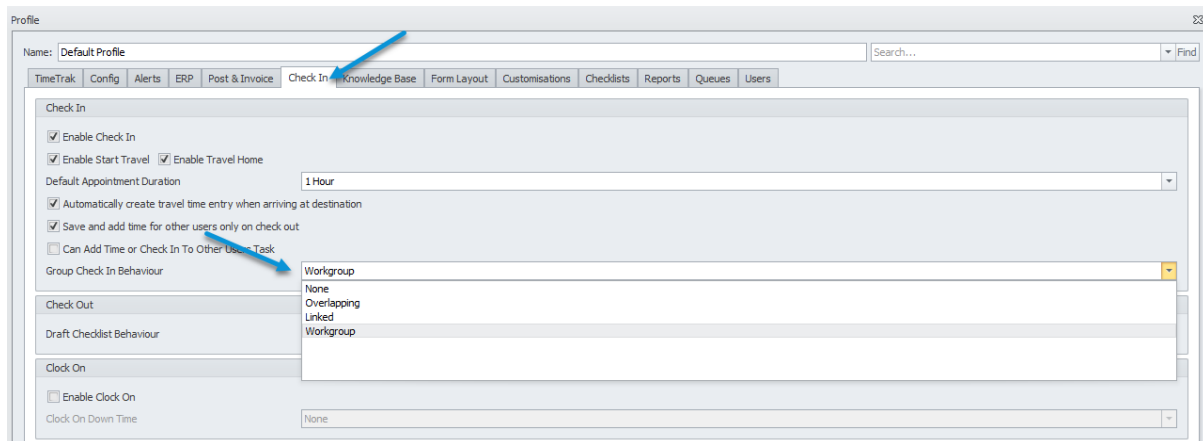
This is a helpful feature if clients call to cancel a job and the scheduler needs a quick way to remove all appointments for this day.



### Group Scheduling Enhancements

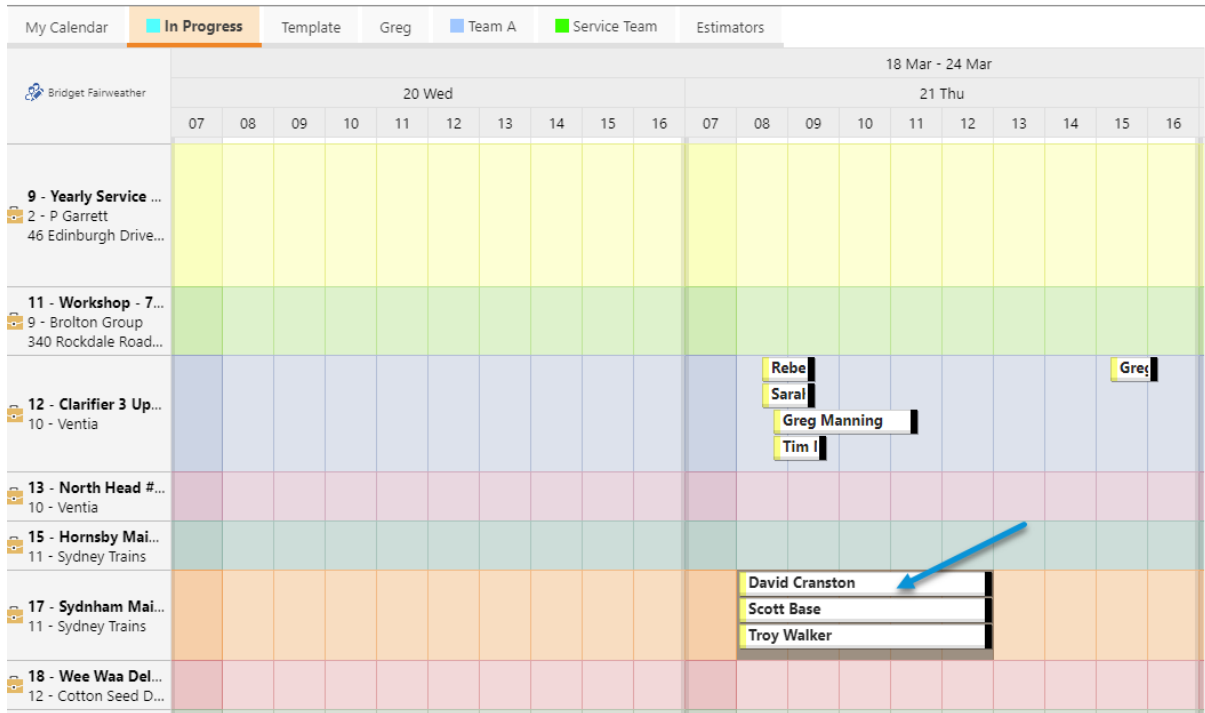
Previously in TimeTrak 4.0 group scheduling was quite restrictive and “teams” of users would need to be setup as workgroups however if these teams changed rapidly this was very hard to manage.

In TimeTrak 19.1 we have added linked and overlapping as additional types of scheduling. Which type of group check-in behaviour needs to be specified at a profile level as per below:



The original “Workgroup” functionality is still available, for more on Workgroups click [here](#)

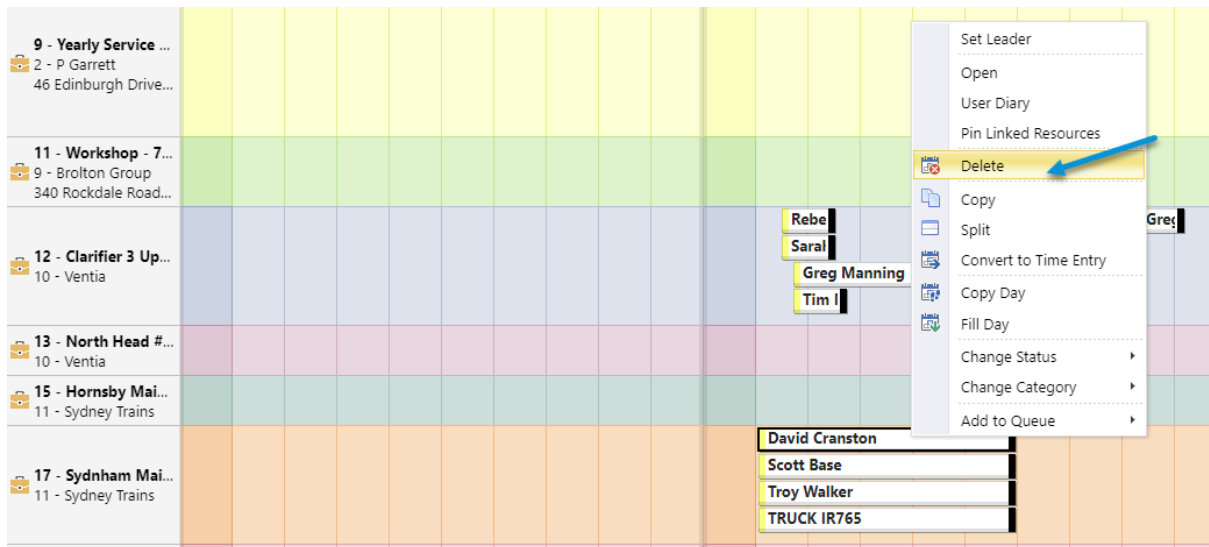
When scheduling any appointments created at the same time these become “linked” appointments. Appointments can then be added to at any time, for example is a Truck needs to be scheduled with the below group of users



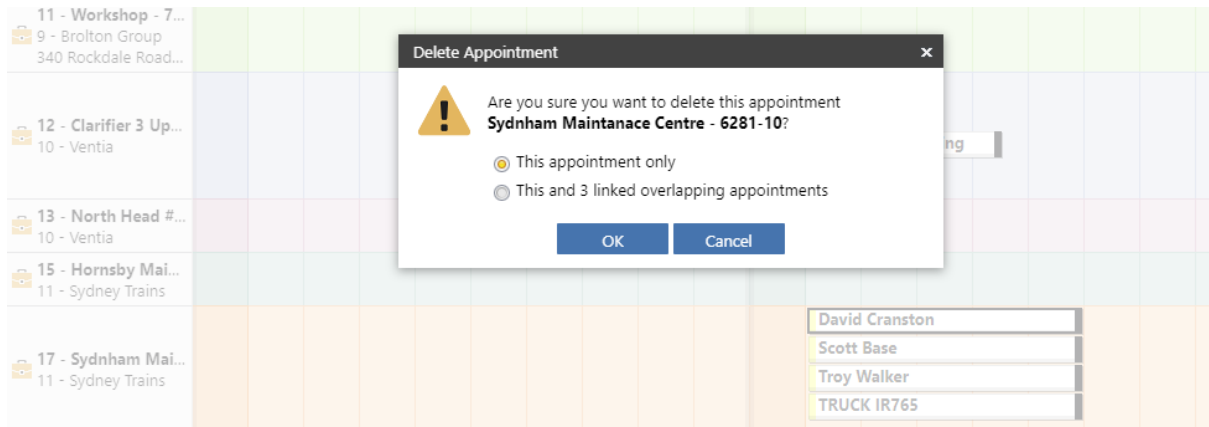
Any one of these appointments can be opened and the Truck or additional Resource can be selected in the resource panel as per below:

The screenshot shows the 'Appointment (226)' details window. The 'Appointment Details' section includes Client (Sydney Trains), Job (Sydnham Maintenance Centre - 6281-10 - 17 (17)), Subject (Sydnham Maintenance Centre - 6281-10), and Location. The 'Resources' section lists various roles and names: ADMINISTRATORS (Sarah Wilson, Greg Manning), SERVICE TECH (TRUCK IR765, TRUCK YU876), SUB CONTRACTOR (Tim McIntosh), and EQUIPMENT (David Cranston). A blue arrow points to the 'Show Conflicts' button.

This will create a linked appointment for the Truck.  
If the scheduler then goes to delete David's appointment (because he is sick)

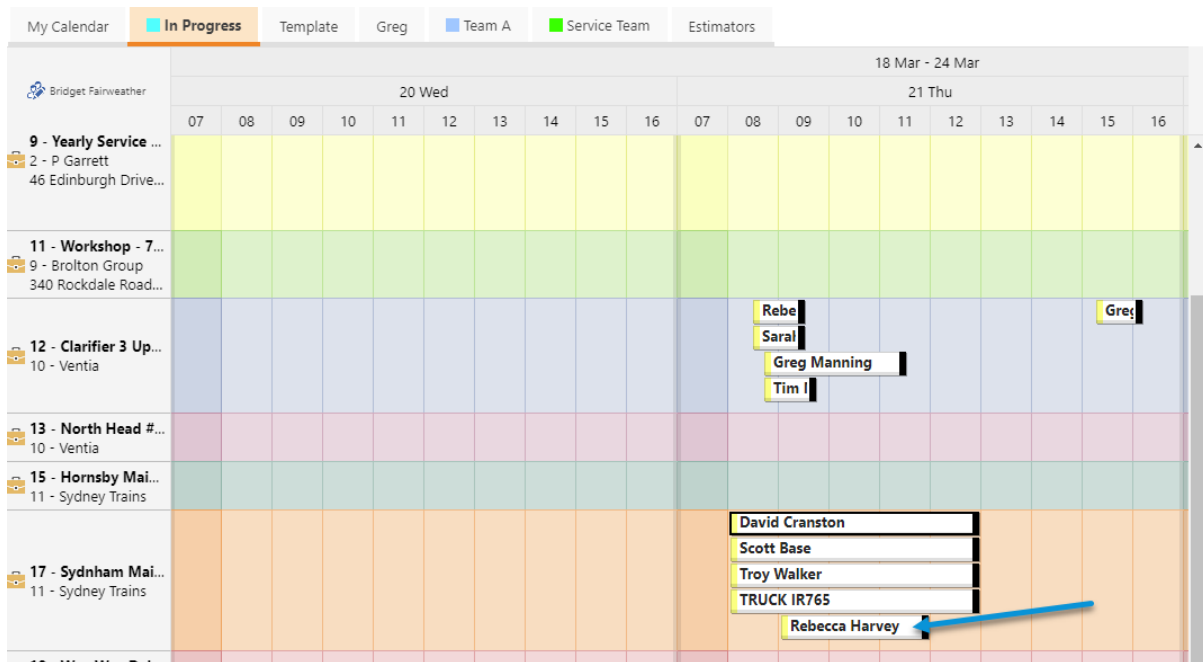


The below pop up will appear, giving the option to delete just David's appointment or the linked overlapping appointments also.

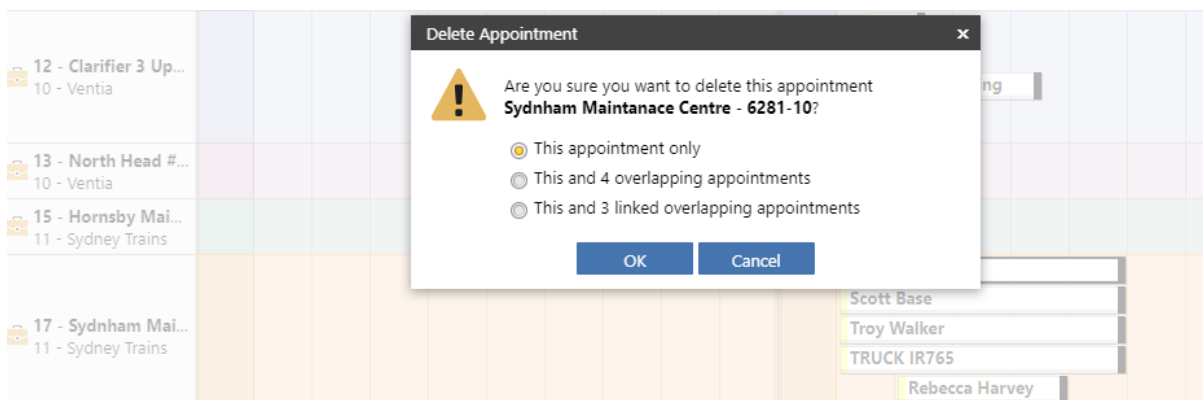


If I then add an additional appointment for Rebecca to attend this site on the same day (but a different time period that overlaps the other users appointments) her appointment becomes an "overlapping" appointment.

It is not a linked appointment as it was created separately, however it is an overlapping appointment due to her appointment overlapping the other users appointments per below:



If the scheduler then goes to delete David's appointment (because he is sick) the below pop up will appear providing an additional option



**This appointment only:**

*Delete only the selected appointment (David's Appointment)*

**This and 4 overlapping appointments:**

*Delete all appointments that overlap (David, Scott, Troy, Truck and Rebecca's)*

**This and 3 linked overlapping appointments:**

*Delete the selected appointment and the 3 linked overlapping appointments (David, Scott, Troy and Truck) as they are linked appointments.*

As mentioned earlier, these appointment relationships are important for mobile users when working in teams if they are completing time entries for their team members as the group check in behaviour needs to be defined at a profile level.

If David's Profile has the group check-in behaviour set to "linked" as per below

rofile

Name: **Mobile Profile**

TimeTrak | Config | Alerts | ERP | Post & Invoice | **Check In** | Knowledge Base | Form Layout | Customisations | Checklists | Reports | Queues | Users

**Check In**

Enable Check In


Enable Start Travel  Enable Travel Home

Default Appointment Duration:

Automatically create travel time entry when arriving at destination

Save and add time for other users only on check out

Can Add Time or Check In To Other Users Task

Group Check In Behaviour:  

And he checks into this appointment in mobile, he is prompted to check in the resources with linked appointments (Scott, Troy and Truck) as per below:

← Back | ☰ Menu | **Manage Check In**

**Manage Check In**

**i** Some resources may need to be manually checked in.

**Non-workgroup resources**

**Scott Base**  
17 - Sydnham Maintanace Centre - 6281-10  
*Related Appointment*

**Troy Walker**  
17 - Sydnham Maintanace Centre - 6281-10  
*Related Appointment*

**TRUCK IR765**  
17 - Sydnham Maintanace Centre - 6281-10  
*Related Appointment*

**Continue**

However if David's profile has the group check-in behaviour set to "overlapping" as per below

Profile

Name: **Mobile Profile**

TimeTrak | Config | Alerts | ERP | Post & Invoice | **Check In** | Knowledge Base | Form Layout | Customisations | Checklists | Reports | Queues | Users

**Check In**

Enable Check In


Enable Start Travel  Enable Travel Home

Default Appointment Duration:

Automatically create travel time entry when arriving at destination

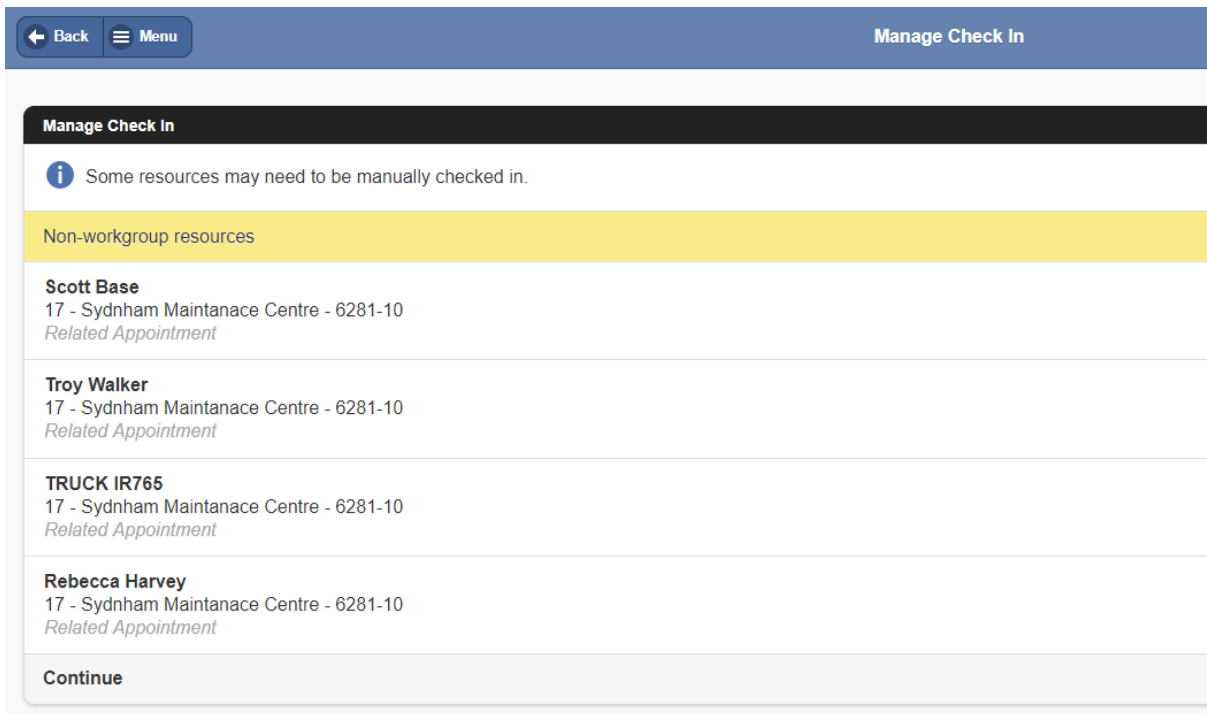
Save and add time for other users only on check out

Can Add Time or Check In To Other Users Task

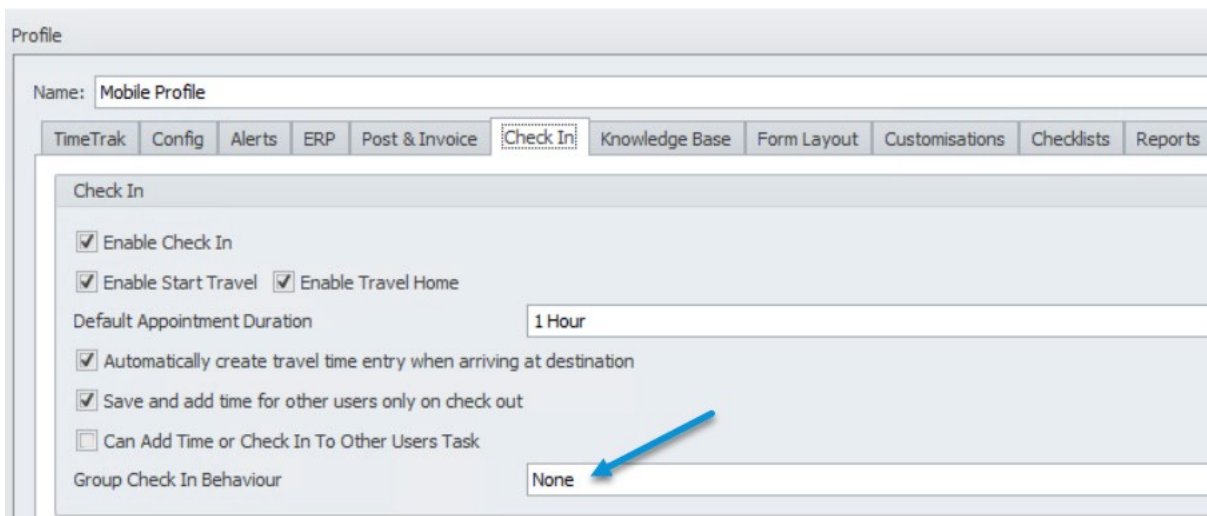
Group Check In Behaviour:  

And he checks into this appointment in mobile, he is prompted to check in the resources with overlapping appointments (Scott, Troy, Truck and Rebecca) as per below:



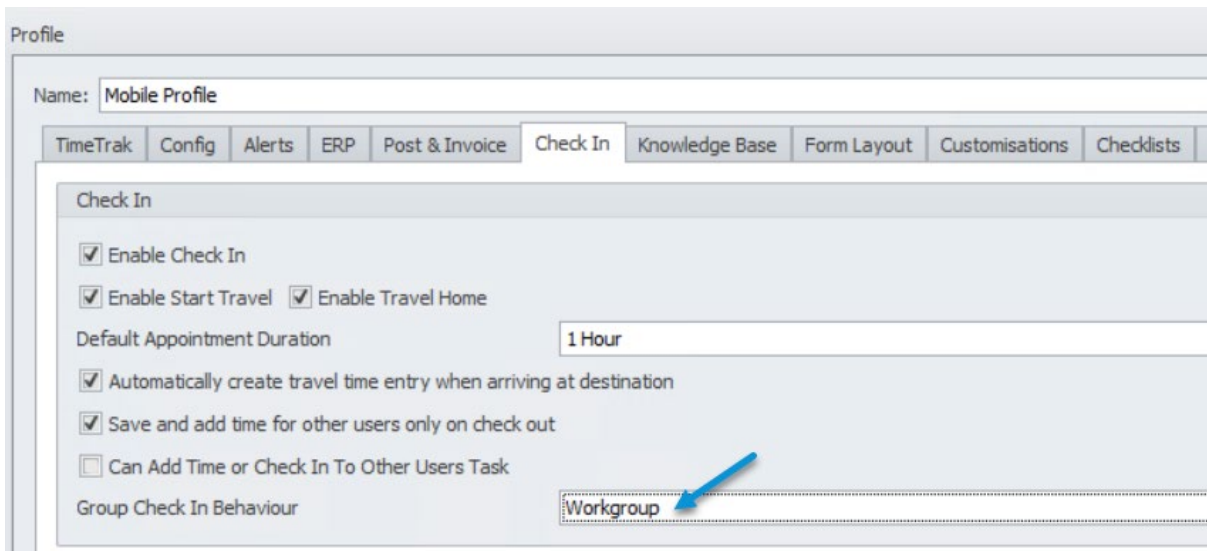


If David's profile has the group check-in behaviour set to "None" as per below



And he checks into this appointment in mobile only he will be checked into the appointment, there is no prompt to check in other users.

If David's profile has the group check-in behaviour set to "workgroup" as per below

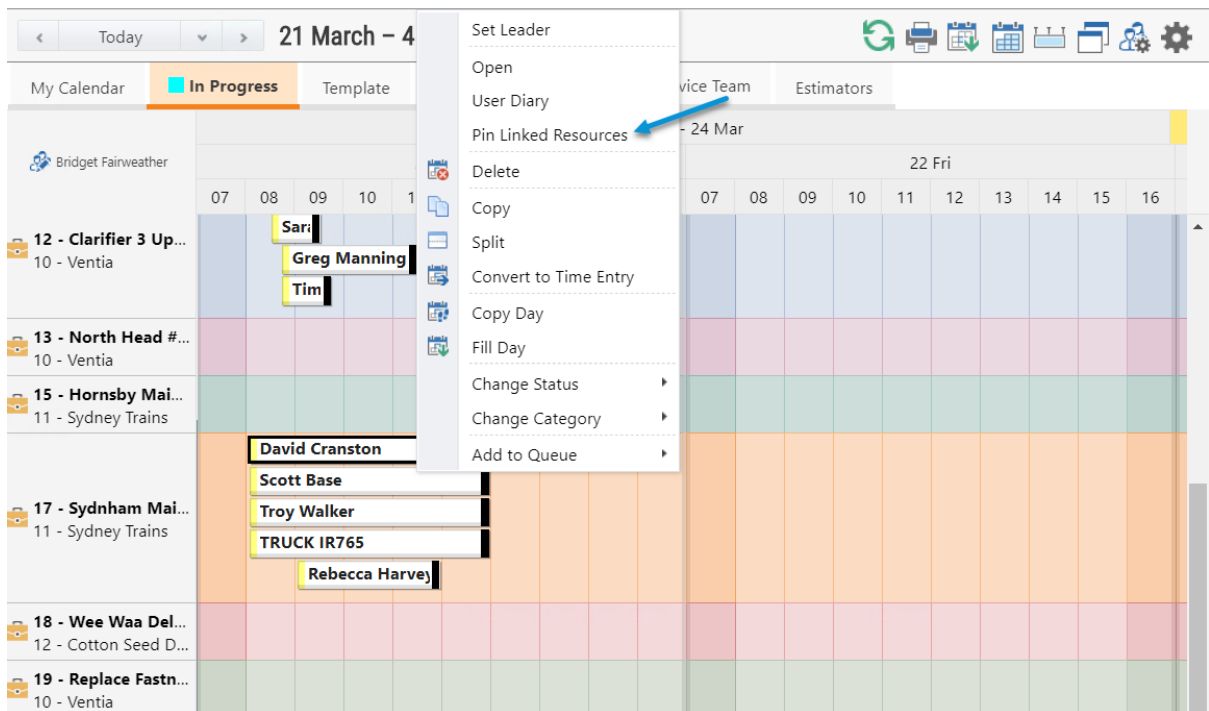


And he checks into this appointment in mobile the standard 4.0 workgroup behaviour will apply. For more information on this click [here](#)

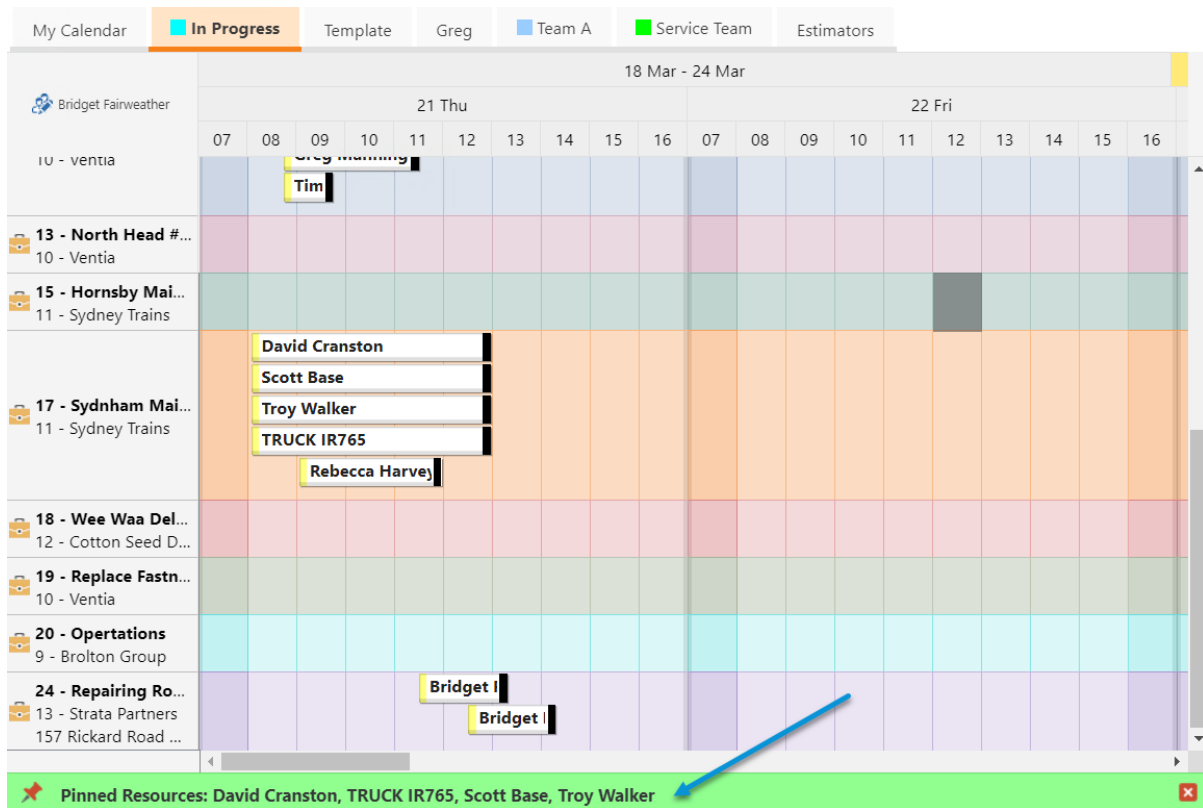
### Pin Linked Resources

Again to assist schedulers with managing group scheduling via our new scheduling method there is the ability to "Pin Linked Resources".

To do this right click and select "Pin Linked Resources" as per below:



This will Pin the users from the "linked" appointments, as per below the users pinned will be displayed at the bottom of the screen



On appointment creation these users are passed in by default as per below, providing schedulers the ability to create numerous linked appointments for a group of users quickly.

The 'New Appointment' form includes the following sections:

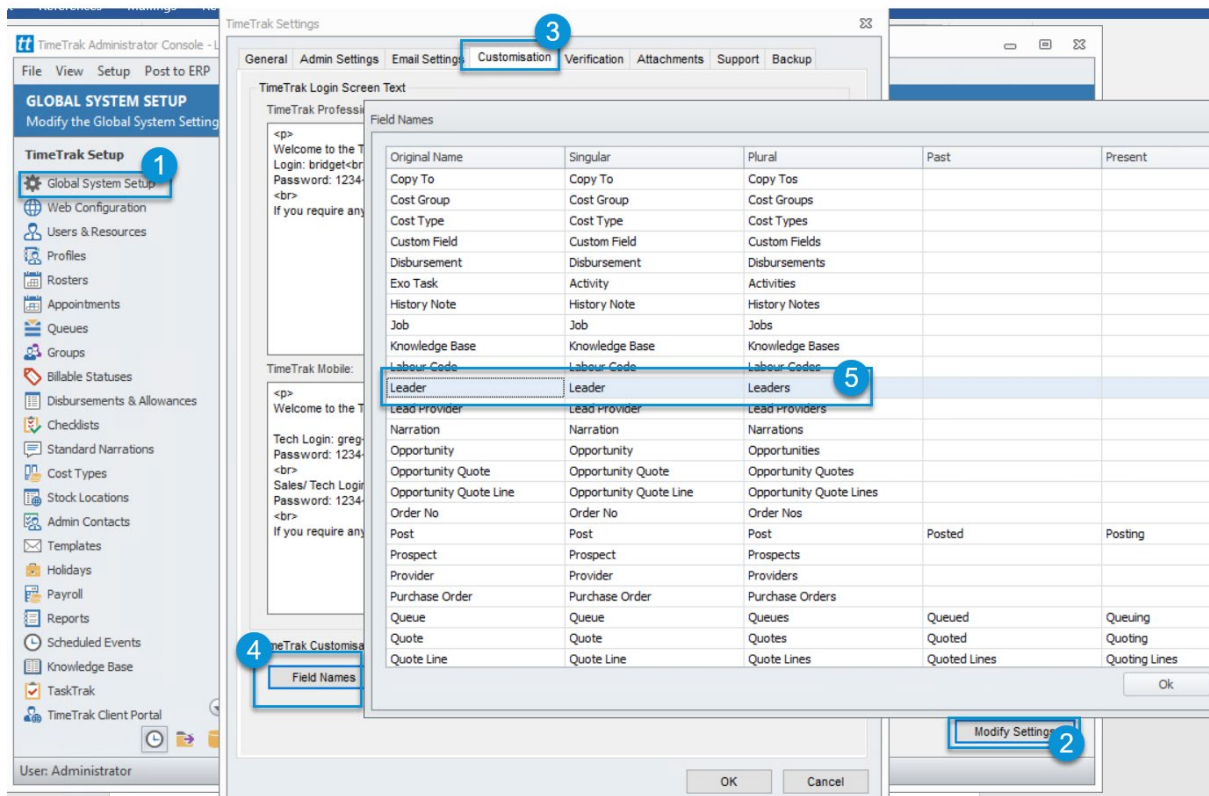
- Appointment Details:** Client: Sydney Trains; Job: Sydnham Maintenance Centre - 6281-10 - 17 (17); Subject: Sydnham Maintenance Centre - 6281-10; Location: Sydnham Maintenance Centre - 6281-10.
- Resources:**
  - ADMINISTRATORS:** Sarah Wilson, Bridget Fairweather, Daily Schedule, Rebecca Harvey
  - SERVICE TECH:** TRUCK IR765 (checked), TRUCK YU876
  - SUB CONTRACTOR:** Greg Manning, Tim McIntosh, Sub Contractor 1
  - EQUIPMENT:** David Cranston
- Dates:** Start Time: 28/03/2019 8:30 AM; End Time: 28/03/2019 5:00 PM; Hours: 8.50; Repeat: 0 days until Thu 28/03/2019; Show Time As: Busy
- Update Associated Items:** Job Status: IN PROGRESS; Job Category: MAINTENANCE AGREEMENT

### Set a Team Leader

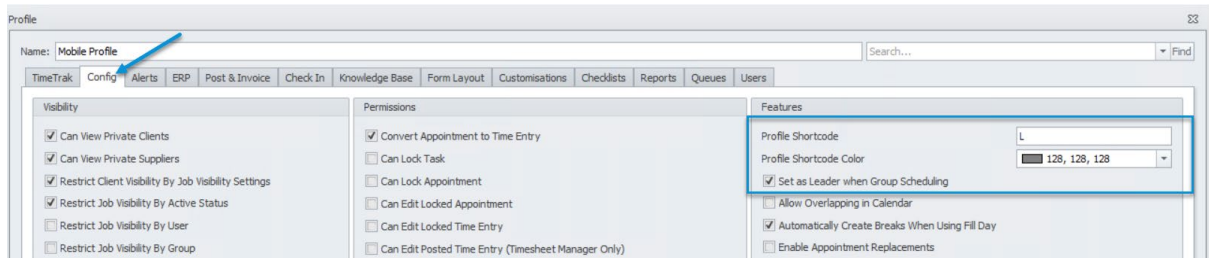
Commonly businesses who schedule groups of resources identify these groups by a "Team Leader" or "Site Supervisor".

To assist with this there is now the ability to allocate a resource as a "leader".

The team leader can be customised to "Team Leader" etc to be more relevant as per below:

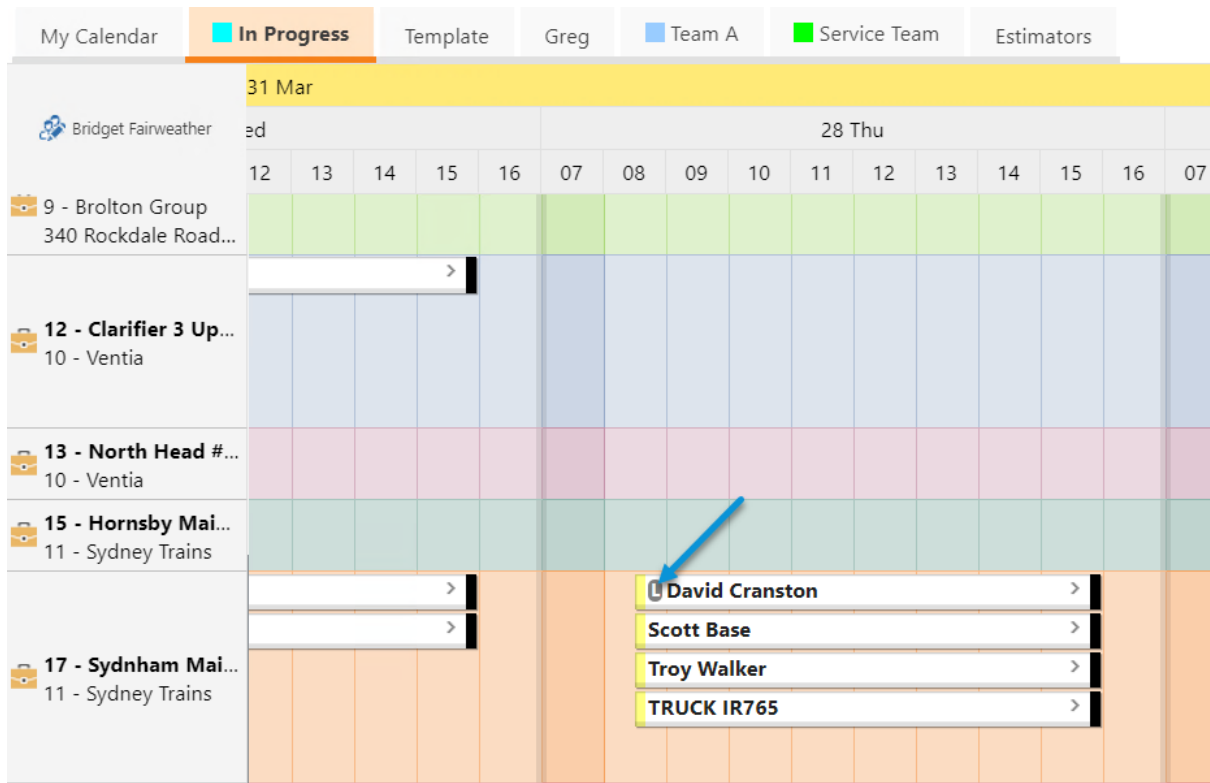


There are the additional profile settings as per below:



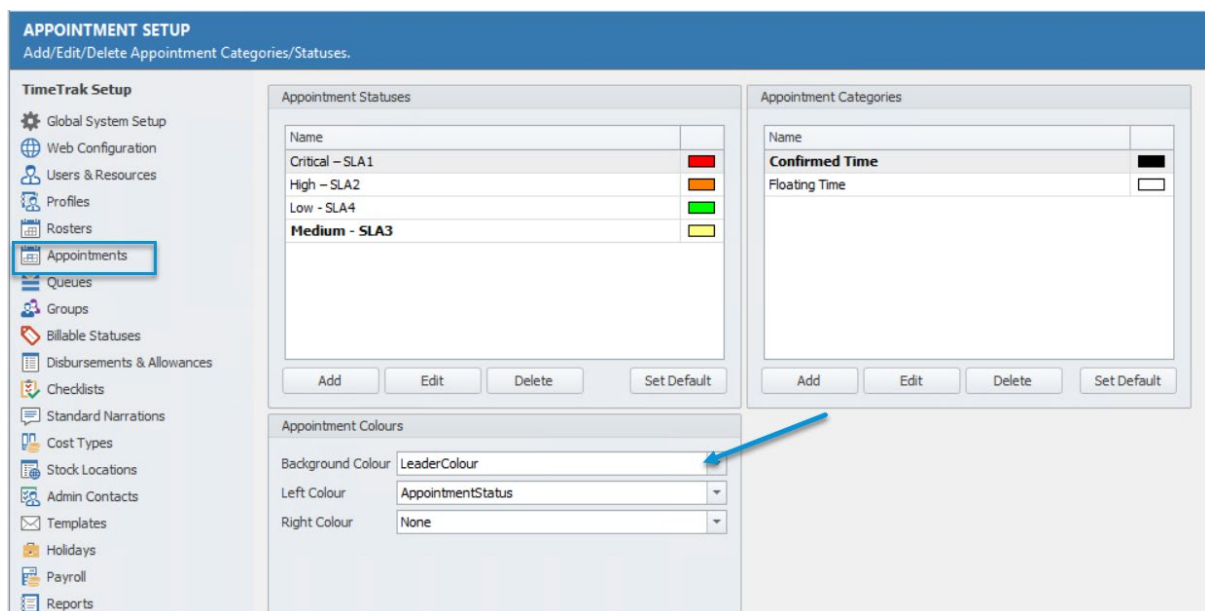
When a user is assigned to a profile with "Set as Leader when group scheduling" by default they will be set as the "Leader".

To identify this in a timeline calendar a profile short code and colour can be assigned to the profile as per below:

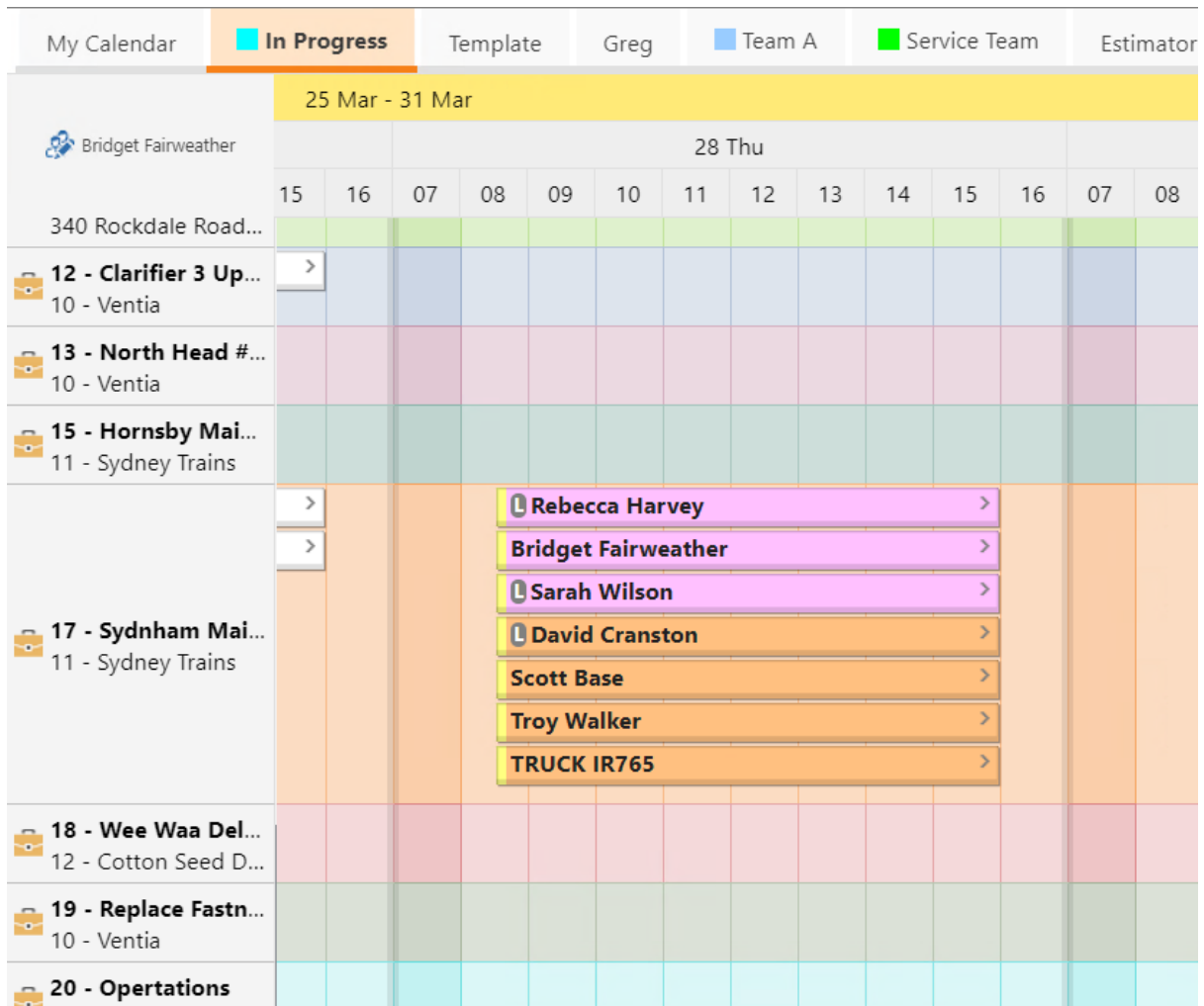


There is also the added ability to colour code appointments based on the “leader” colour to assist schedulers visually with group scheduling.

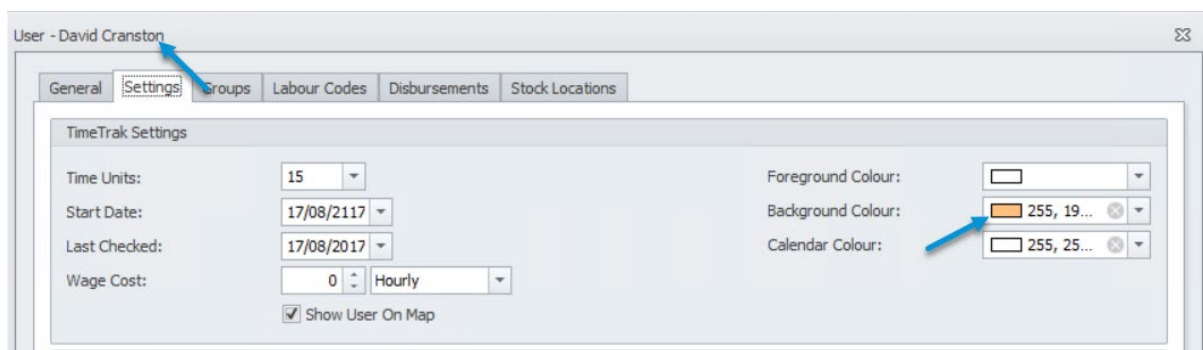
As per below this is located in the appointment setup in the TimeTrak Administrator console. In this example the leader colour is set as the appointment background colour.



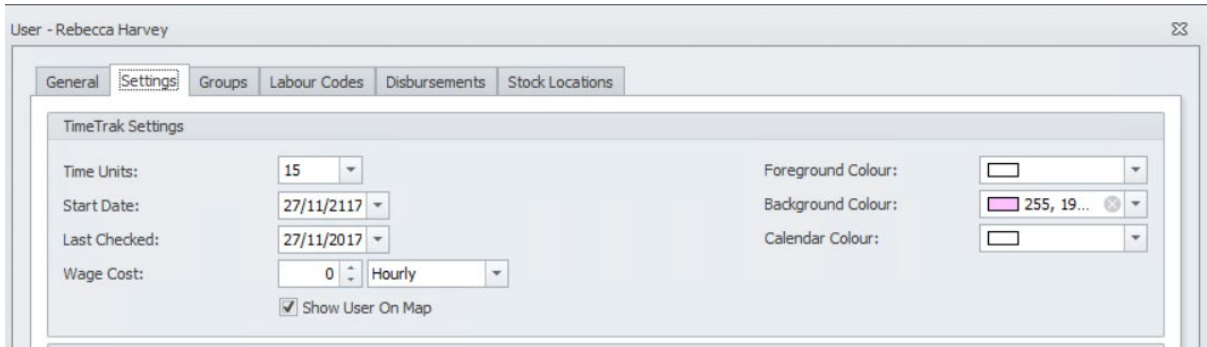
This can be seen as per below:



One set of appointments is orange due to David having orange set against his user in the TimeTrak admin console:

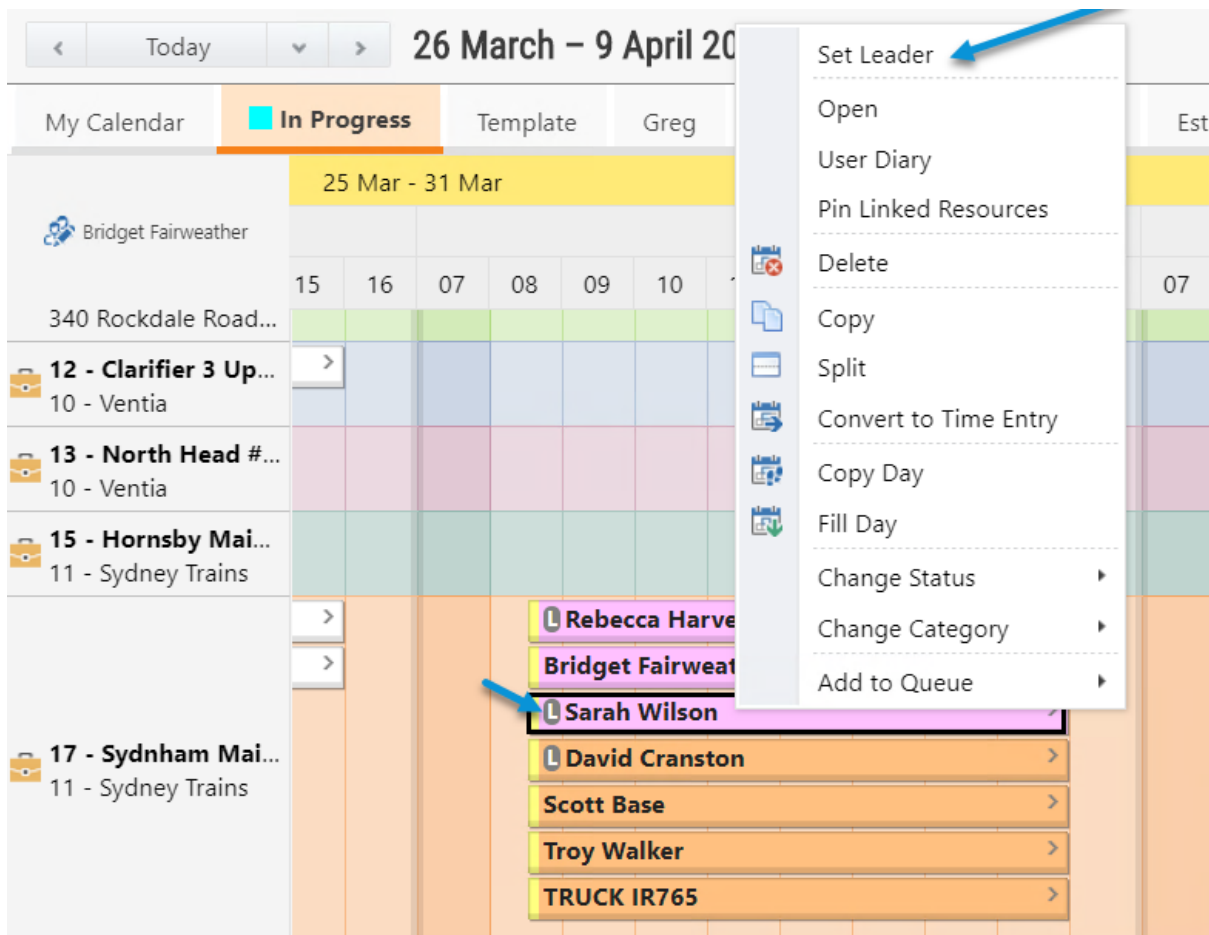


One set of appointments is pink due to Rebecca having pink set against her users in the TimeTrak admin console:

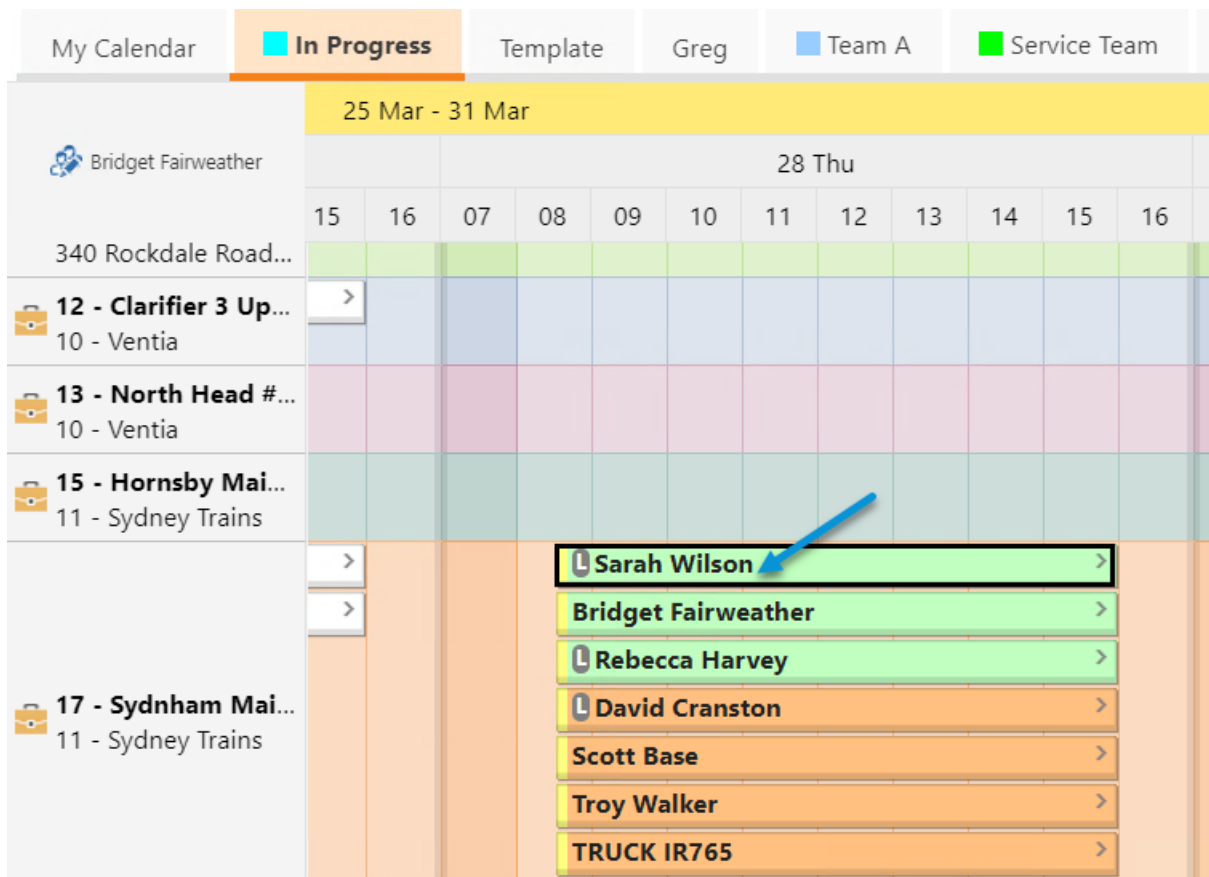


In Rebecca's team we can see that both her and Sarah are against a profile which is defined to "Set as Leader when group scheduling" meaning that either of these users have the ability to be the team leader.

If Sarah should be the team leader on this particular day, schedulers can right click on Sarah and select "Set as leader" as per below:



This moves Sarah to the top these linked appointments and changes the appointments to green which is assigned against Sarah's user in the admin console.



The screenshot shows the 'User - Sarah Wilson' settings window. The 'Settings' tab is selected. Under 'TimeTrak Settings', the 'Background Colour' is set to green, which corresponds to the 'Service Team' color in the calendar view. The 'Calendar Colour' is set to red. The 'Foreground Colour' is set to white. The 'Wage Cost' is set to 0 Hourly. The 'Show User On Map' checkbox is checked.

This then clearly shows users that there are two groups scheduled to this job on the 28<sup>th</sup>, Sarah is the team leader for one group and David is the team leader for the other.