

Job Schedule Activity

Job Schedule Activity Screen Overview

Video training manual 2021 - [Click Here](#)

The **Job Schedule Activity** screen provides a comprehensive, multi-view overview of all jobs, allowing you to monitor progress, manage schedules, and optimise resources from a single location.

Using the tabs available, you can view and manage jobs from different perspectives:

- **Job Activities** – Displays detailed task breakdowns per job, giving full visibility of the work required.
- **Job Schedule** – Provides a high-level timeline view of all jobs, helping you see when work is planned, identify overlaps or gaps, and adjust schedules to keep jobs on track for completion.
- **Employee Schedule** – Shows how work is allocated across individual employees, allowing you to identify who is busy, who may be overloaded, and who has capacity to assist.
- **Team Schedule** – Displays how teams are assigned to jobs and tasks, supporting team-based planning and workload balancing.
- **Employee Tasks** – Provides a task-level view for each employee, giving a more detailed breakdown of individual responsibilities

Job Costing Module

Configuration

Activity

New Quote

Quotation

Bookin

Manage Job

Job Lines

Planned Timelog Schedule

Job Schedule Activity

Time Tracker Exports

GRV to Job

Picking Slip

Job Total Analysis

Job Delivery Note

Job Schedule Activity

Search Task Inv To Job Workflow Print / Export

SearchMultiple JobsExpand

Job Number:QT No:Job Description:

Date From:2026-06-04Date To:2028-06-04

Job ActivitiesJob ScheduleEmployee ScheduleTeam ScheduleEmployee TasksAudit

Page 0 of 0EditDeleteManage JobRemove Paging:Value to Invoice: 0.00

#	To Inv	Seq	Task Type	Due	Team C	Team Name	J-Status	Job Status	Task Status	T-Status	J-Est St
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Job Schedule Activity – Overview Screen

This screen provides a **comprehensive overview of all current and future jobs**, allowing you to monitor progress, track statuses, and manage workload across teams.

Summary

- Provides an overview of all job activities and task statuses
- Shows job progress, timing, and team allocation
- Highlights tasks that require attention
- Supports monitoring of current and upcoming work

Job Costing Module

Job Schedule Activity

Search

Task Inv To Job

Workflow

Print / Export

Search

Multiple Jobs

Expand

Job Number:

QT No:

Job Description:

Date From:

2021-06-04

Date To:

2028-06-04

Job Activities

Job Schedule

Employee Schedule

Team Schedule

Employee Tasks

Audit

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Edit

Delete

Manage Job

Remove Paging:

Value to Invoice: 710.86

#	To Inv	Seq	Task Type	Due	Team C	Team Name	J-Status	Job Status	Task Status	T-Status	J-Est Start Date	Job No	Quote No	Job De
1	0		MT	▲	■	Team 1	▲	Started	NotStarted	▲	2022-04-11	JOB2	QT53	Job do
2	0		MT	▲	■	Team 1	▲	NotStarted	Started	●	2022-01-17	JOB6	QT71	Deliver
3	0		MT	▲	■	Team 1	▲	Started	NotStarted	▲	2022-08-05	JOB1017	QT146	Job A f
4	1		MT	▲	■	Team 1	▲	Started	Started	●	2022-04-11	JOB2	QT53	Job do
5	1		MT	▲	■	Team 1	▲	NotStarted	NotStarted	▲	2022-01-17	JOB6	QT71	Deliver
6	1		MT	▲	■	Team 2	▲	NotStarted	Started	●	2022-01-17	JOB6	QT71	Deliver
7	1		MT	▲	■	Team 1	▲	NotStarted	NotStarted	▲	2022-06-13	JOB15.1	QT100	Going i
8	1		MT	▲	■	Team 2	▲	NotStarted	Started	●	2022-06-13	JOB15.1	QT100	Going i
9	1		SPLT	▲	■	Team 1	▲	NotStarted	NotStarted	▲	2022-06-13	JOB15.1	QT100	Going i
10	1		MT	▲	■	Team 1	●	Started	NotStarted	▲	2021-12-20	JOB20	QT107	Job pri
11	1		MT	▲	■	Team 2	●	Started	Started	●	2021-12-20	JOB20	QT107	Job pri
12	1		MT	▲	■	Team 1	●	Started	NotStarted	▲	2021-12-27	JOB1001	QT111	Storm
13	1		MT	▲	■	Team 1	●	Started	NotStarted	▲	2022-03-01	JOB1008	QT123	Vehicle
14	1		MT	▲	■	Team 3	●	Started	Started	●	2022-03-01	JOB1008	QT123	Vehicle
15	1		MT	▲	■	Team 1	●	Started	Started	●	2022-03-01	JOB1008	QT123	Vehicle
16	1		MT	▲	■	Z Man Team 2	▲	NotStarted	Started	●	2022-03-21	JOB1009	QT124	Station

- Job List Overview

- Each row represents a **job task or activity** linked to a job.
- It includes key details such as:
 - **Job Number**
 - **Quote Number**
 - **Team assigned**
 - **Estimated start date**
 - **Job description**

- Status Tracking (Key Feature)

The screen gives a clear snapshot of where each job sits using multiple status columns:

- **Job Status**
 - *Started* (green)
 - *Not Started* (red)
- **Task Status**
 - Indicates whether the specific task has begun
- **T-Status (Traffic Light Indicator)**
 - Green = On track
 - Red = Requires attention / delay
 - Provides a quick visual health check of the job

- Team Allocation

- The **Team Code and Team Name** fields show which team is assigned to each job.
- This helps identify:
 - Who is responsible
 - Workload per team

- Time Visibility

- The **Estimated Start Date** shows when jobs are planned to begin.
- This allows you to:
 - View **upcoming work**
 - Identify **current active jobs**
 - Spot overlaps or scheduling conflicts

- Filtering & Search

At the top of the screen, you can filter by:

- Job Number
- Quote Number
- Job Description
- Date range

This helps you focus on **specific jobs, time periods, or teams**.

- How It's Used

This screen is typically used to:

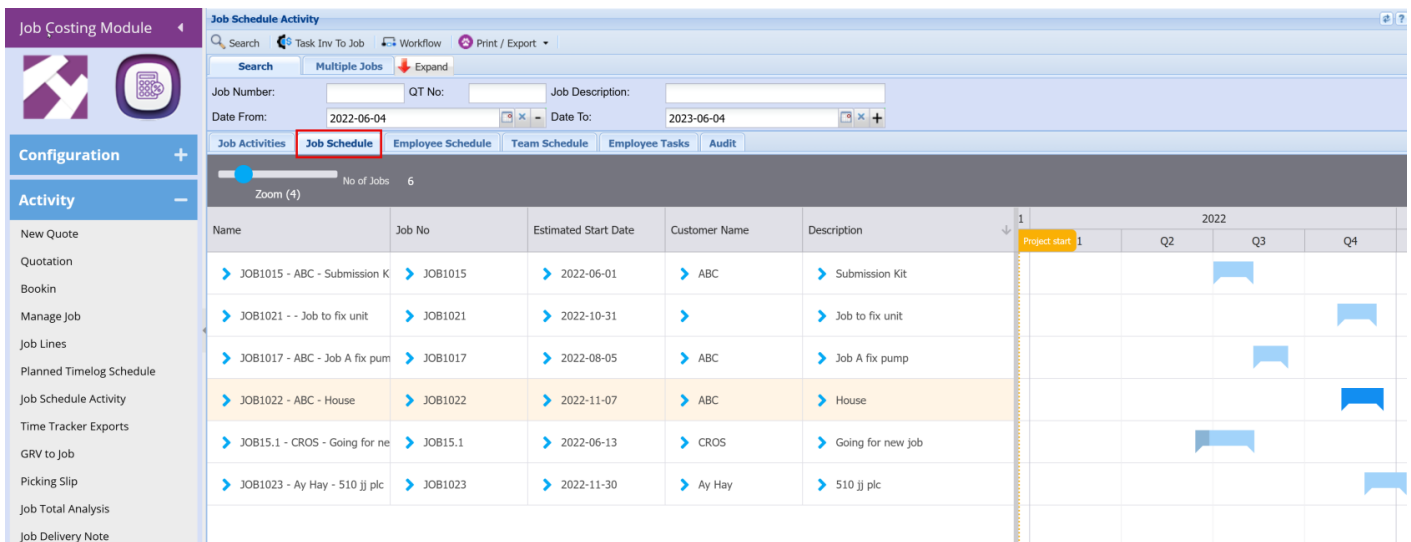
- Monitor **all jobs in one place** (current and future)
 - Track **progress and status at a glance**
 - Identify **delays or issues quickly**
 - Review **team allocations and workload**
 - Support planning decisions before using detailed scheduling screens
-

Job Schedule Screen Overview

This screen provides a **timeline view of current and future jobs**, helping you track when jobs are planned to start and how they are spread over time.

Summary

- Provides a high-level timeline view of all jobs
- Highlights workload distribution, gaps, and overlaps
- Helps identify overbooking and capacity issues
- Supports planning and rescheduling to keep jobs on track



What the Screen Shows

- Left Panel - Job Details

Each row represents a **job**, with key information including:

- **Name** – Job number and short description
- **Job No** – Unique job reference
- **Estimated Start Date** – When the job is scheduled to begin
- **Customer Name** – Who the job is for
- **Description** – Summary of the work

- Right Panel - Timeline (Gantt View)

- Displays jobs visually across a **calendar timeline (by month/quarter)**
- Each job is shown as a **blue bar**
- The position of the bar shows:
 - When the job is scheduled
 - How long the job is expected to run
- The **“Project Start” marker** highlights the beginning of the selected timeline period

- Key Features

Visual Planning

- Quickly see **current jobs vs upcoming jobs**
- Identify gaps, overlaps, or busy periods

Timeline Scaling

- The **Zoom slider** allows you to adjust how much detail is shown (more detail or broader view)

- Job Tracking

- Easily monitor:
 - Jobs starting soon
 - Jobs scheduled later in the year
 - Workload distribution over time

- Quick Navigation

- Clicking a job (via the arrow icon) allows you to **drill into job details**

- How It's Used

This screen is ideal for:

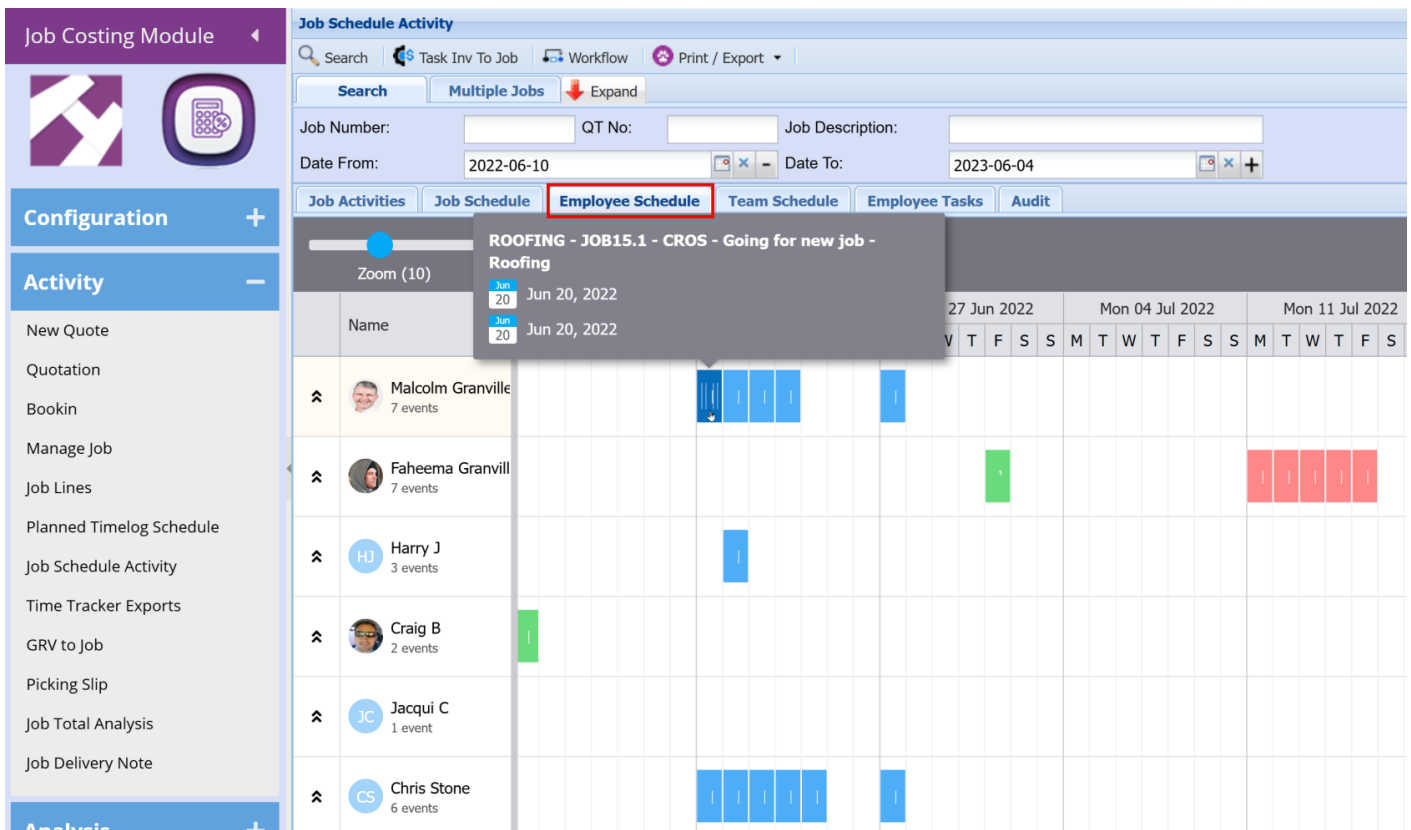
- **High-level planning**
 - Reviewing **future workload**
 - Checking **job timing and sequencing**
 - Supporting scheduling decisions before assigning teams/resources
-

Employee Schedule Screen Overview

This screen provides a **resource-focused view of all employees and their allocated work**, helping you understand who is working on what, when, and how busy each person is.

Summary

- Displays employee work allocation across a timeline
- Helps identify who is busy and who has capacity
- Supports workload balancing and resource planning
- Hover over tasks to view job details



What the Screen Shows

- Left Panel - Employees

- Each row represents an **individual employee/resource**
- Displays:
 - Employee name
 - Profile icon
 - Number of scheduled **events/tasks**

This allows you to quickly see **who is active and how much work is assigned**.

- Right Panel - Timeline Schedule

- Jobs are displayed as **coloured blocks across a calendar (by day/week)**
- Each block represents a **task assigned to that employee**
- The position and length of the block shows:
 - When the work is scheduled
 - How long the task will take
- Hovering over a block shows **job details** (e.g. job number, description, dates)

- Key Features

Resource Visibility

- See exactly **where each employee is allocated**
- Understand what jobs each person is working on across the timeline

- Workload Management

- Identify employees who:
 - Have **too many tasks scheduled (overloaded)**
 - Have **gaps or light workloads (underutilised)**

This makes it easy to balance work across the team.

- Support & Reallocation

- Quickly determine:
 - Who may **need assistance**
 - Who is available to **help on other jobs**

This improves team efficiency and reduces delays.

- Visual Indicators

- Multiple coloured blocks indicate **multiple tasks or longer workloads**
- Large clusters of blocks = **busy periods**
- Minimal or no blocks = **availability**

- Zoom Control

- Adjust the **Zoom slider** to view:
 - Detailed daily schedules
 - Or a broader weekly overview

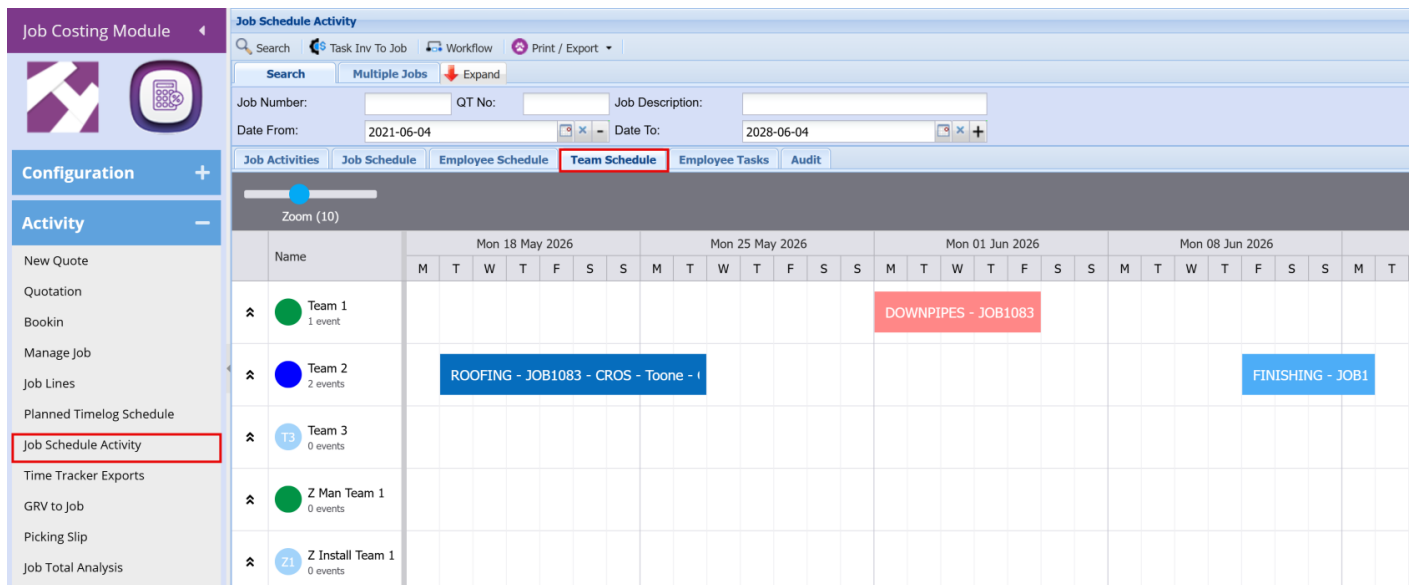
- How It's Used

This screen is ideal for:

- **Daily and weekly planning**
 - Monitoring **individual workloads**
 - Balancing work across staff
 - Ensuring no one is **overbooked or underutilised**
 - Improving overall **resource efficiency**
-

Team Schedule Screen Overview

This screen is used to **plan and manage team workloads across jobs and dates**. It provides a visual schedule that helps you track where each job sits and how teams are allocated over time.



Key Features

- Team-Based Scheduling

- Each row represents a **team** (e.g. Team 1, Team 2, etc.).
- Jobs are assigned to teams and displayed as **coloured bars** across the calendar.

- Timeline View

- The grid is organised by **days and weeks**, allowing you to see:
 - When jobs are scheduled
 - How long each job will take
 - Any overlaps or gaps in scheduling

- Drag-and-Drop Functionality

- Jobs can be easily **moved between teams or dates** by dragging and dropping.
- This allows you to:
 - Adjust schedules if a job is **running behind or ahead**
 - Reallocate work between teams to balance capacity
 - Quickly respond to changes in production or priorities

- Visual Job Tracking

- Each job is shown as a labelled block (e.g. *ROOFING - JOB1083*).
- The length of the block represents the **duration of the task**.
- Colours help visually distinguish between jobs or job types.

- How It's Used

This screen is typically used by planners or managers to:

- Allocate jobs to specific teams
- Monitor daily and weekly workloads
- Adjust schedules in real time
- Keep production aligned with deadlines

Employee Tasks Screen Overview

The **Employee Tasks** screen provides a **detailed, task-level view of work assigned to each employee**, allowing you to track individual responsibilities, progress, and timing in a structured list format.

Job Costing Module

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Multiple Jobs

Expand

Job Number:

QT No:

Job Description:

Date From:

2022-06-04

Date To:

2028-06-04

Job Activities

Job Schedule

Employee Schedule

Team Schedule

Employee Tasks

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Edit

Edit Task

Search Today

Status Staff Today

#	Name	Assignment Date	T-Date Start	T-Date End	Surname	Day	Train Level	J-Status	J-Status	Action
1	Craig	2026-07-22	2022-11-30	2022-11-30	B	Wednesday		NotStarted		MEASURE
2	Malcolm	2022-11-21	2022-11-30	2022-11-30	Granville	Monday		NotStarted		MEASURE
3	Malcolm	2022-08-23	2022-08-10	2022-08-10	Granville	Tuesday		NotStarted		MEASURE
4	Jacqui	2022-08-04	2022-08-10	2022-08-10	C	Thursday		NotStarted		MEASURE
5	Faheema	2022-08-01	2022-08-09	2022-08-10	Granville	Monday		NotStarted		VAT Submission
6	Harry	2022-07-25	2022-08-08	2022-08-11	J	Monday		Started		FINISHING
7	Harry	2022-07-22	2022-08-08	2022-08-11	J	Friday		Started		FINISHING
8	Faheema	2022-07-15	2022-07-04	2022-07-09	Granville	Friday		Started		DOWNPIPES
9	Faheema	2022-07-14	2022-07-04	2022-07-09	Granville	Thursday		Started		DOWNPIPES
10	Faheema	2022-07-13	2022-07-04	2022-07-09	Granville	Wednesday		Started		DOWNPIPES
11	Faheema	2022-07-12	2022-07-04	2022-07-09	Granville	Tuesday		Started		DOWNPIPES
12	Faheema	2022-07-11	2022-07-04	2022-07-09	Granville	Monday		Started		DOWNPIPES
13	Faheema	2022-07-01	2022-07-01	2022-07-01	Granville	Friday		NotStarted		VAT Submission
14	Chris	2022-06-27	2022-06-26	2022-07-04	Stone	Monday		Started		ROOFING
15	Malcolm	2022-06-27	2022-06-26	2022-07-04	Granville	Monday		Started		ROOFING
16	Chris	2022-06-24	2022-06-26	2022-07-04	Stone	Friday		Started		ROOFING

What the Screen Shows

Each row represents a **task assigned to an employee**, with key information including:

- **Name** – The employee assigned to the task
- **Assignment Date** – When the task is scheduled
- **Task Start & End Dates** – Planned duration of the task
- **Day** – The day of the week the task falls on
- **Train Level** – Indicates skill level or proficiency of the employee
- **Job Status (J-Status)** – Shows whether the job is:
 - **Started** (green)
 - **Not Started** (red)
- **T-Status (Traffic Indicator)**
 - Green = On track
 - Red = Requires attention
- **Action** – The specific activity being performed (e.g. Roofing, Downpipes, Finishing)

- Key Features

Detailed Task Visibility

- Provides a **clear breakdown of tasks per employee**
- Allows you to see exactly **what each person is doing on specific days**

- Progress Tracking

- Monitor whether tasks have been **started or not started**
- Use visual indicators to quickly identify **issues or delays**

- Resource Allocation Insight

- Helps you understand:
 - Who is working on which tasks
 - How work is distributed across employees
 - Whether tasks align with employee skill levels

- Daily Planning Tool

- The structured format makes it ideal for:
 - Reviewing **daily workloads**
 - Confirming task assignments
 - Ensuring all required work has been allocated

- How It's Used

This screen is typically used for:

- **Supervisors or managers** to review and assign tasks
- Tracking **day-to-day execution of jobs**
- Ensuring all employees are correctly allocated to tasks
- Monitoring **task progress and completion readiness**

Revision #6

Created 12 June 2026 07:31:28 by Pamela

Updated 15 June 2026 01:59:11 by Pamela