

Knowledge Base



Introduction to Scheduling in Gojee

Scheduling workers (employees and contractors) against tasks in Gojee is ideal for helping you plan your jobs, optimize your workers day and improve the efficiency of your business.

You can schedule your workers either against billable job tasks, or non-billable job tasks (i.e. internal tasks not charged to a customer for example).

If you'd prefer not to use proactive scheduling, you can also simply track time for your workers without scheduling tasks. Refer to [Time Tracking](#) for more information.

Schedule workers onto jobs

Scheduling workers onto a job means that when time is tracked for the job it will be allocated as a cost for the job.

Prerequisites:

To schedule workers against jobs in Gojee the following are required:

- Profession(s) have been created. Refer to this article [Professions](#).
- Staff have been created and assigned one or more profession(s). Refer to this article [Employees and Contractors](#).

- You know how to create jobs and use the BOM page [Jobs and Projects](#).

To schedule your workers onto jobs, the following steps are required:

- Add a profession onto the Job BOM page (refer to [Create a Job](#) for more information).

Job Settings

Customer

Job Details

Bill of Materials

Comments

Attachments

Professions

Add Bill of Material...

Undo Edits

Unfreeze

Item code	Name	Type	Unit	U	U	U	U	U	U	Total cost	Disc. total	Total price		
	Computer Equipment		hour	\$1	Baker									
					Builder					5.00	0.00	30.00		
					Electrician									
I5003	Reverse Cycle Split S...		each	\$1,000.00						536.00	0.00	1575.01		
I5001	Ceiling Fan		each	\$100.00	108	208.0000		1	0	0	0	\$100.00	0.00	208.00

- Save & Exit the job.
- From the [Job Actions](#) menu, click on Schedule:

Hi, let's create your first job

Click on the video to watch how to create your first job.

The video will demonstrate how to use the system and explain the basic steps required to get you up and running.

If you would like further information, please [Contact Us](#)

Customer Jobs
Active All

Add Refresh

Job reference	Customer	Job Title	Preferred Start Date	Last Update	Quoted Amount	Invoiced Amount	Deposit Amount	
100012	bayside club	-	03 Jul 2023	03 Jul 2023, 12:47	Not Quoted	Not Invoiced	No deposits	Job Actions

- The job scheduler page will be shown:

Jobs > Job 100012 > Schedule									
Today Monday, July 03, 2023									
Electrician									
Required Minutes: 60, Scheduled Minutes: 0									
July 03									
Electrician	James Lebrun	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM
	Jimmy Oliver								
	Odette Garrison								
	Oliver Gray								
	Sally Martin								
	Sonia Michaels								
	Tony Brown								
	Tracy Green								

Note: In this view only the professions required for the job, and the staff that can perform these professions will be shown. The hours required for the profession (i.e. as entered on the BOM page) will be shown at the top for each profession, along with the hours already scheduled. To see all tasks for all staff refer to the [Staff Scheduler Page](#) section below.

- To add a task for a worker, simply double click on the scheduler in the location you'd like to add the task. You will be presented with the following modal:

Add new task

Start Time

03/07/2023 08:25 AM

End Time

03/07/2023 09:25 AM

Electrician

Jimmy Oliver

Create

Cancel

- Click “Create” button to schedule the task and it will be shown as a coloured task within the scheduler page:

Today

Monday, July 03, 2023

Electrician

Required Minutes: 60, Scheduled Minutes: 60

		5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM
Electrician	James Lebron					
	Jimmy Oliver				Electrician - bayside club	
	Odette Garrison					

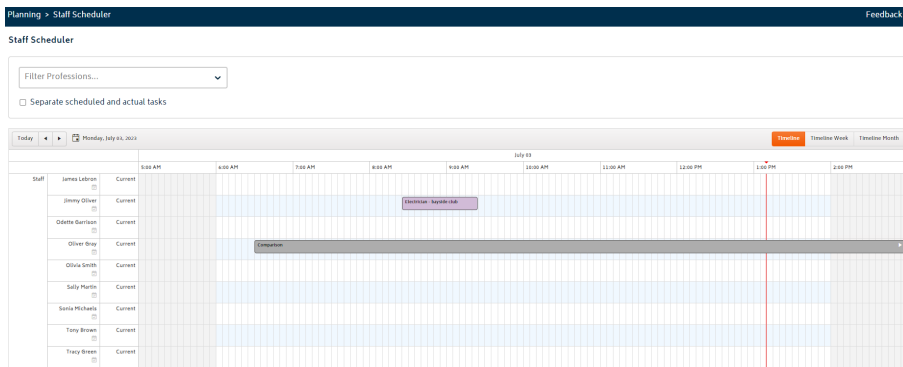
Note:

- You can split tasks between one or more workers, or one or more occurrence for the same worker. To do this, simply add another task in the same profession view and modify the times of the tasks to control the total hours scheduled.
- Existing tasks not related to this job will be shown in grey to avoid overbooking.
- Changes will be automatically saved and you can navigate away once done.

Schedule workers for non-job tasks

Scheduling workers onto a non-job tasks (also referred to as non billable tasks) mean that when time is tracked for the task, it will not be allocated as a cost for a job. The time will still be allocated to the timesheets of the workers.

To get started, you can either navigate to [Planning > Staff Schedule](#) from the top menu, or from the dashboard click on HR Management, then select “View All Scheduled Jobs”. You will be directed to job scheduler page:



- Double click on the scheduler to create a task for the worker:

Add new task

Title

Start Time
03/07/2023 09:35 AM

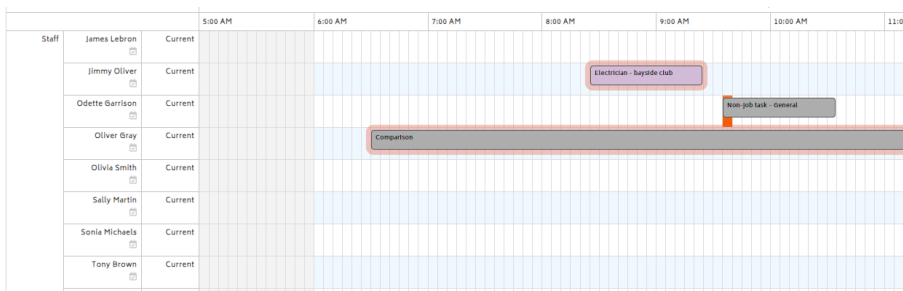
End Time
03/07/2023 10:35 AM

Staff
Odette Garrison

Activity
General

Create Cancel

- Once the task has been created, it will automatically be displayed as a scheduled task for the staff member.
- You can review the tasks by navigating to Staff Schedule page:



View the list of tasks scheduled for workers

All users can navigate to their [My Work > Active Jobs](#) page to see a list of the tasks they have been assigned in an agenda type view:

gojee

My Work - Planning - Jobs - Resources - Reports -

Demo Company (AU) 23 Aug 23

My Work > Active Jobs

Feedback

Active Jobs

Date

07/09/2023

Staff Member

Jimmy Oliver

Customer

Select Customer

Job

Select Job

active task

inactive task

complete task

Scheduled Tasks

Customer	Job Reference	Scheduled Start	Scheduled Time	Logged Time	Task	
Abby & Wells	J00023	07 Sep 2023, 10:00	01:00	00:00	Electrician - Abby & W...	<div>Start</div> <div>Complete</div> <div>View Job</div> <div>Record Consumables</div>

Incomplete/Overdue Tasks ^

Incomplete Overdue

Customer	Job Reference	Scheduled Start	Scheduled Time	Logged Time	Task	
7-Eleven	J00005	23 Aug 2023, 15:00	01:00	00:00	Electrician - 7-Eleven	<div>Start</div> <div>Complete</div> <div>View Job</div> <div>Record Consumables</div>
Bayside Club	J00002	23 Aug 2023, 09:24	04:00	06:00	Air Cond. Technician - ...	<div>Start</div> <div>Complete</div> <div>View Job</div> <div>Record Consumables</div>

Track Time On Demand

Start Timer On a Job

Start Break

Start Downtime

Job managers can also view the list of tasks scheduled for all workers at once on the [staff schedule](#) page.

Introduction to the Staff Schedule Page

Users with role **Customer Job Manager** or above can navigate to HR Management from the dashboard, and select “View all Scheduled Jobs” button. This will show users all the scheduled tasks across all workers, and can be shown in a daily, weekly or monthly view:

Set up Staff, Contractors and Professions

Manage Staff & Contractors

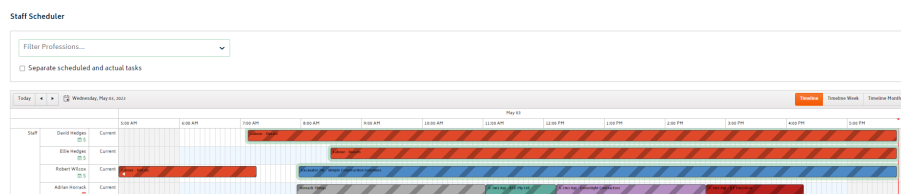
Manage Professions

Scheduling and Tracking Time ?

Schedule Staff Onto Jobs

Track Staff Time Against Jobs

View All Scheduled Jobs



Note: You can click on any of the scheduled tasks to review the details:



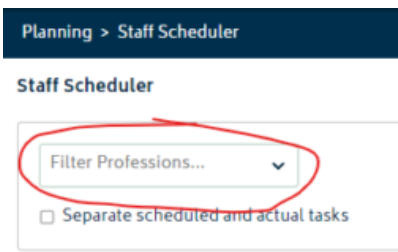
Using the Staff Scheduler

Once you're on the staff scheduler page, there is a rich set of features to help you optimise the allocation of your workers, and to get a real time view of how your jobs are tracking.

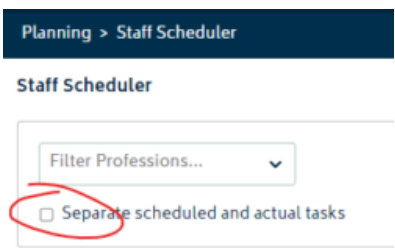
The features on this page are described below:

Filter for Professions

Use this filter to show only tasks that are for the selected profession chosen from the dropdown.

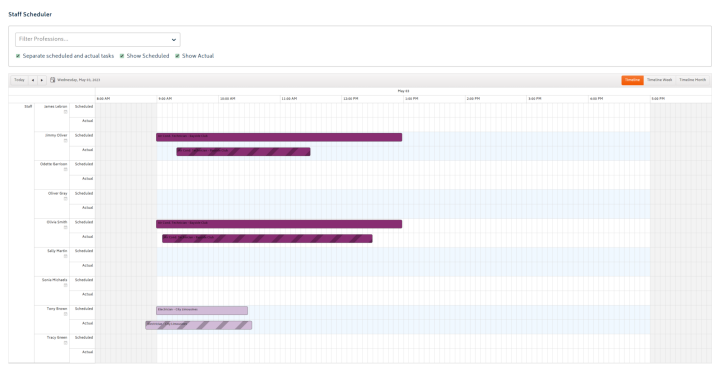


Toggle to "separate scheduled and actual tasks"

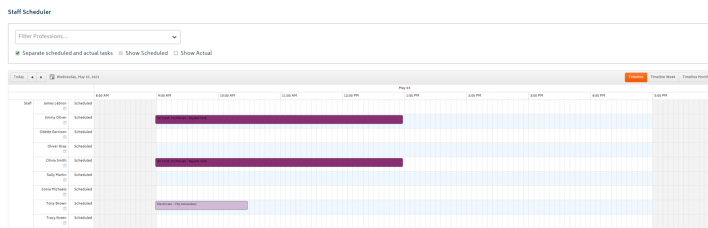


This toggle allows you to compare the estimated or scheduled hours to the actual times captured for the tasks. There are three different views available, including a joint view and an individual view for each. Examples of these options are provided below:

View 1: Both scheduled and actual tasks

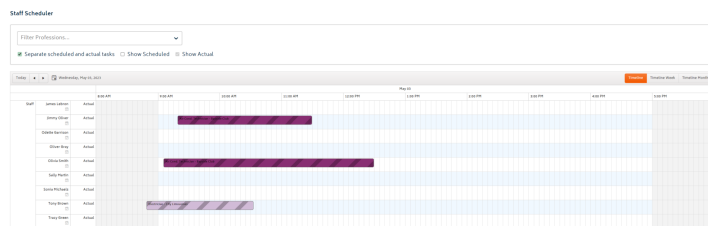


View 2: Scheduled tasks only



This is not actual time, its the planned time for when the task is scheduled.

View 3: Actual tasks only



These are actual time records tracked or entered for a worker.

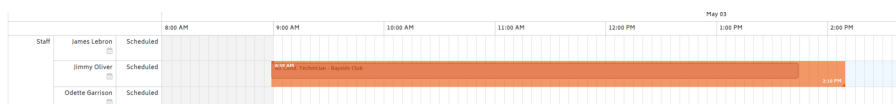
Dropping and Dragging Tasks

- Users can simply click, drag and drop tasks on this view from one worker to another.
- There is a requirement that the worker the task is being moved to has the same profession that is required for the task. If this requirement is not met, a warning will be provided and the task will go back to where it was dragged from:



Drag to extend/shorten tasks

- Hover the mouse over the edge of the task and a double ended arrow will appear
- Click and drag right or left to extend or shorten the task



Click on task to bring up modal

- Click on any task and a modal will be presented with a range of task options.

J00002 - Bayside Club

Staff:

Jimmy Oliver

Profession:

Air Cond. Technician

Select an option below to start timer for task.

Start

Track Break

Track Downtime

Complete

View

Record Consumables

Job Schedule

Comment

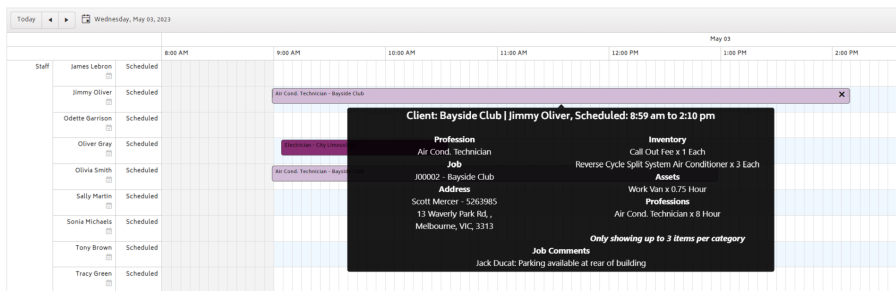
Jack Ducat

04 May 2023, 09:59

Parking available at rear of building

Hover over task for more information

- Hover your mouse over the task and a popup with more information on the task will be displayed:

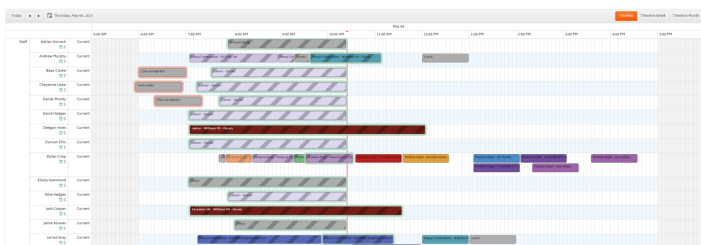


Styling on the Staff Scheduler

In addition to the features on the Staff Scheduler page, there are also styles and formatting applied to help you quickly differentiate tasks and their status. These styles and formats are explained below.

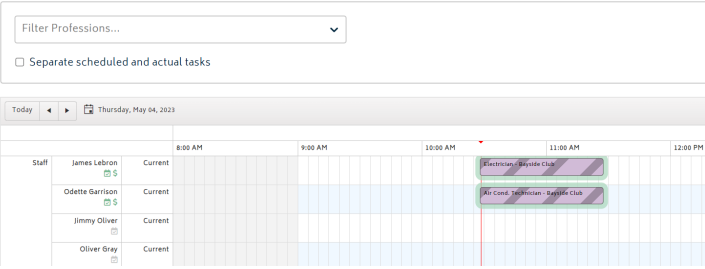
Task colours, fills and borders:

All tasks for the same job will have the same colour on the scheduler



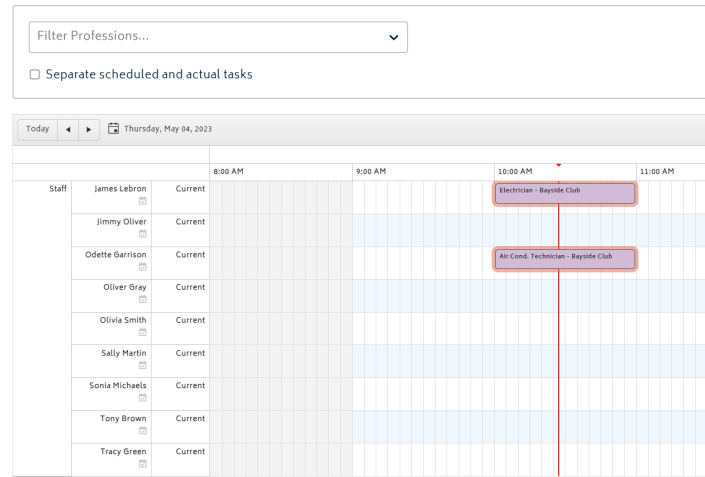
Tasks flashing green and with shading: These are Active jobs (i.e. a timer is running against them)

Staff Scheduler



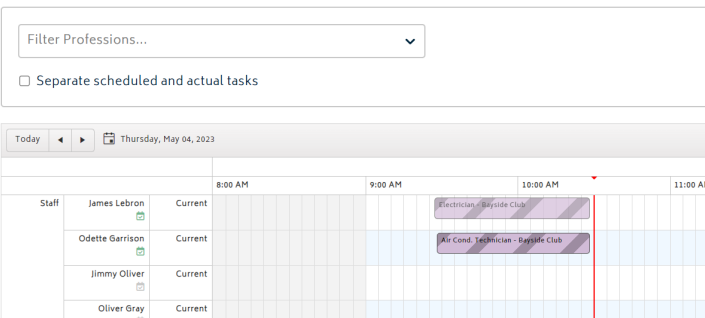
Task flashing red: Overdue (i.e. the task was scheduled to have already started, but it hasn't started)

Staff Scheduler



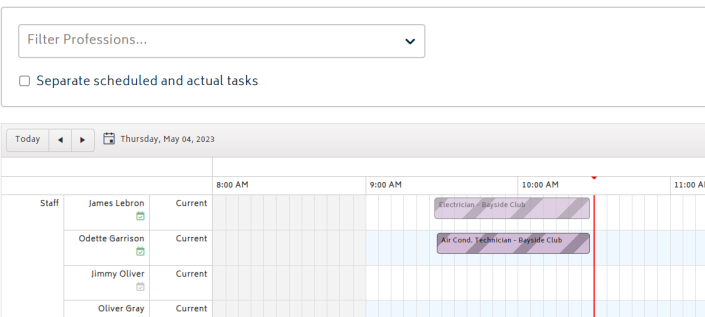
Task washed out and with shading (the task on row one in this image): Task has had time tracked against it and is marked as complete

Staff Scheduler



Task not washed out but with shading (the task on row two in this image): This indicates that the task has had time tracked against it, but its not marked as complete yet.

Staff Scheduler



Billable task icon: \$ Symbol

\$ icon is green: The running timer is for a **billable job**:



Staff Scheduler

☐ Separate scheduled and actual task

Today

◀ ▶

📅 Thursday, May 04, 2023

			8:00 AM		
Staff	James Lebron	Current			
	 \$				
	Odette Garrison	Current			
	 \$				
	Jimmy Oliver	Current			

To track a task as billable, simply select the “Start” option from the modal to start the timer for the task.

J00023 - Abby & Wells ×

Staff:

Profession:

Select an option below to start timer for task.

Start

Track Break

Track Downtime

Complete

View

Record Consumables

Job Schedule

Comment

\$ icon is red: The running timer is for a **non-billable** activity



Staff Scheduler

☐ Separate scheduled and actual tasks

Today

◀ ▶

📅 Thursday, May 04, 2023

			8:00 AM		
Staff	James Lebron	Current			
	 \$				
	Odette Garrison	Current			
	 \$				
	Jimmy Oliver	Current			

To track a task as non-billable, select the “Track Downtime” option from the modal to start the timer for the task.

J00003 - Bayside Club

Staff:

Odette Garrison

Profession:

Air Cond. Technician

Select an option below to start timer for task.

Stop

Track Break

Track Downtime

Complete

View

Record Consumables

Job Schedule

Comment

\$ icon is grey: The running timer is assigned to a **break time**.

Staff Scheduler

Filter Professions...

☐ Separate scheduled and actual tasks

Today

Thursday, May 04, 2023

			8:00 AM
Staff	James Lebron	Current	
	Odette Garrison	Current	

To track a task as break, select the “Track Break” option from the modal:

J00003 - Bayside Club

Staff:

Odette Garrison

Profession:

Air Cond. Technician

Select an option below to start timer for task.

Stop

Track Break

Track Downtime

Complete


View

Record Consumables

Job Schedule

Comment

User started “Time Clock”




The Calendar Icon  is used to represent the status of the Time Clock on the Staff Scheduler page

Staff Scheduler

Filter Professions...

☐ Separate scheduled and actual tasks

Today ◀ ▶ 📅 Thursday, May 04, 2023

			8:00 AM				
Staff	James Lebron  \$	Current					
	Jimmy Oliver 	Current					
	Odette Garrison 	Current					
	Oliver Gray	Current					

- **Green Calendar Icon:** User has started their time clock, or started a task for the day.
- **Grey Calendar Icon:** User has neither started their time clock, or any tasks for the day.
- **Red Calendar Icon:** User clock out for the day using the time clock.

Note: The Time Clock is used to record the time the worker enters and leaves the workplace for the day. Its also referred to as a Bundy Clock. The Time clock is separate to starting a timer against a task. For more information on the Time Clock refer to the [Time Clock](#) page.

Next: [Time Tracking](#).