



V6.09 Training Manual



Scheduler



Find the freedom to focus on what matters with Nimbus

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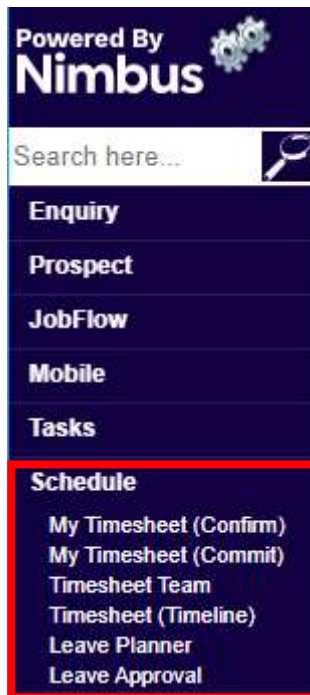
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Scheduler

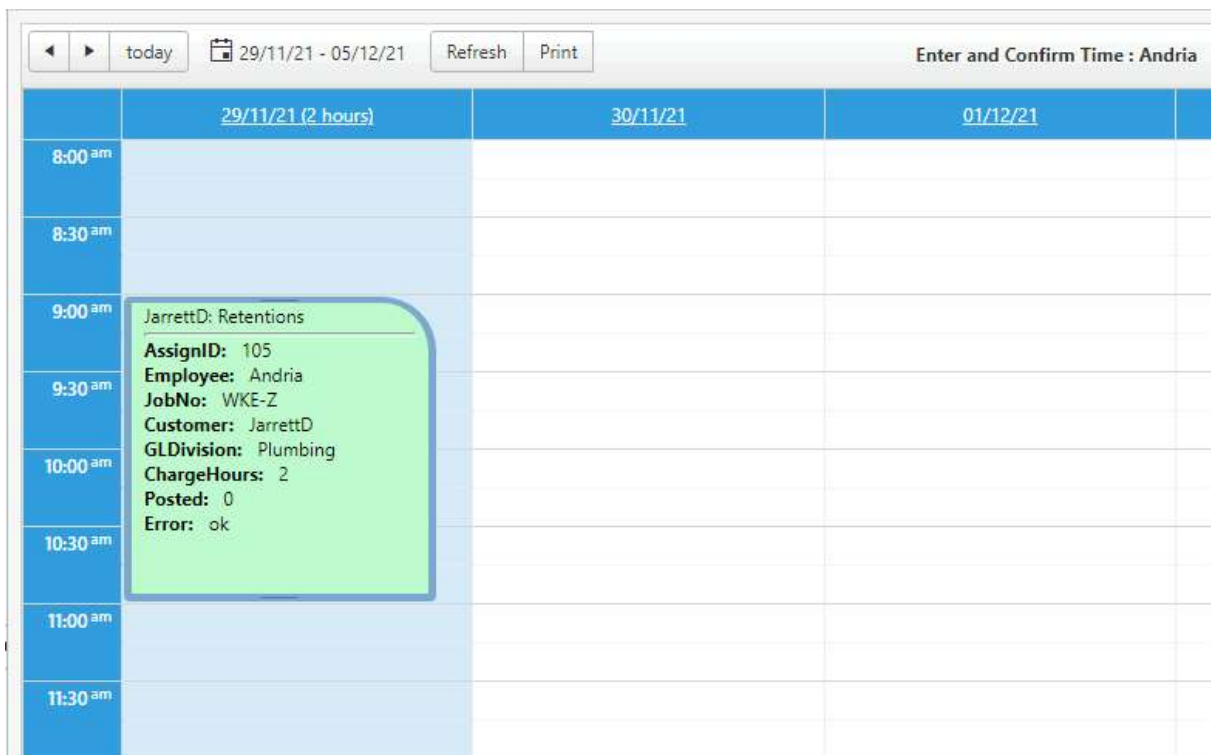
The Nimbus Scheduler is a way to schedule, adjust, post, and control time entries.

The Nimbus Scheduler is accessed from its own menu:



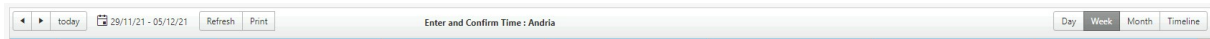
Which accesses the **Scheduler** - a grid time interface.

This is the look of the Scheduler when you choose the **My Timesheet (Confirm)** option:





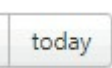
	29/11/21 (2 hours)	30/11/21	01/12/21
8:00 am			
8:30 am			
9:00 am	JarrettD: Retentions AssignID: 105 Employee: Andria JobNo: WKE-Z Customer: JarrettD GLDivision: Plumbing ChargeHours: 2 Posted: 0 Error: ok		
9:30 am			
10:00 am			
10:30 am			
11:00 am			
11:30 am			

The Header

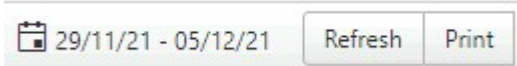


Forward, Back and today:

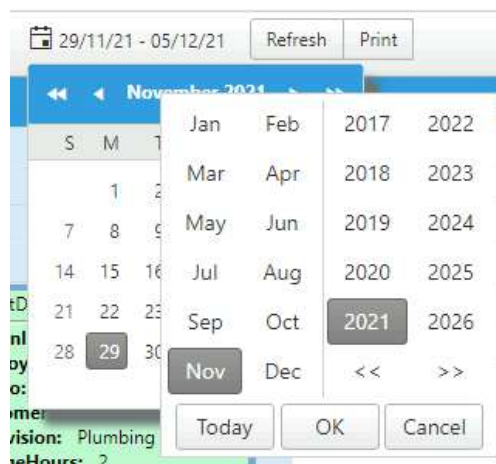


These will take you one step back  or forward  and return you to today  for instance, if you are in the weekly mode then it will go back or forward a week; with today returning you to today.

Date Range, Refresh and Print



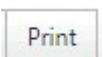
The Date Range  29/11/21 - 05/12/21 brings up a calendar picker:

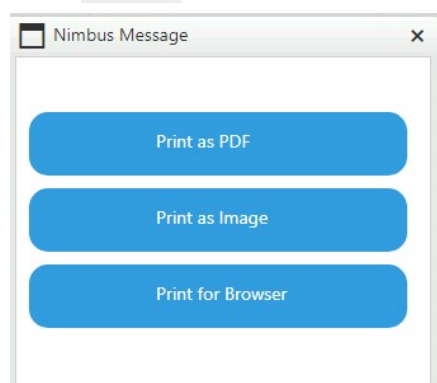


Which allows you to easily change to a different time frame

Refresh and Print

Refresh  refreshes the current view.

Print  brings up your print options:



Which render the image as a .pdf, .png and browser respectively.

Schedule period display options

Day **Week** Month Timeline

Day:

Navigation: < today 29/11/21 Refresh Print Enter and Confirm Time : Andria

8:00 am	
8:30 am	
9:00 am	JarrettD: Retentions
9:30 am	AssignID: 105
10:00 am	Employee: Andria
10:30 am	JobNo: WKE-Z
	Customer: JarrettD
	GLDivision: Plumbing
	ChargeHours: 2
	Posted: 0
	Error: ok

Week:

Navigation: < today 29/11/21 - 05/12/21 Refresh Print Enter and Confirm Time : Andria

	29/11/21 (2 hours)	30/11/21	01/12/21	02/12/21	03/12/21	04/12/21
8:00 am						
8:30 am						
9:00 am	JarrettD: Retentions					
9:30 am	AssignID: 105					
10:00 am	Employee: Andria					
10:30 am	JobNo: WKE-Z					
	Customer: JarrettD					
	GLDivision: Plumbing					
	ChargeHours: 2					
	Posted: 0					
	Error: ok					
11:00 am						

This is the default option, and has the weekend colour coded.

Month:

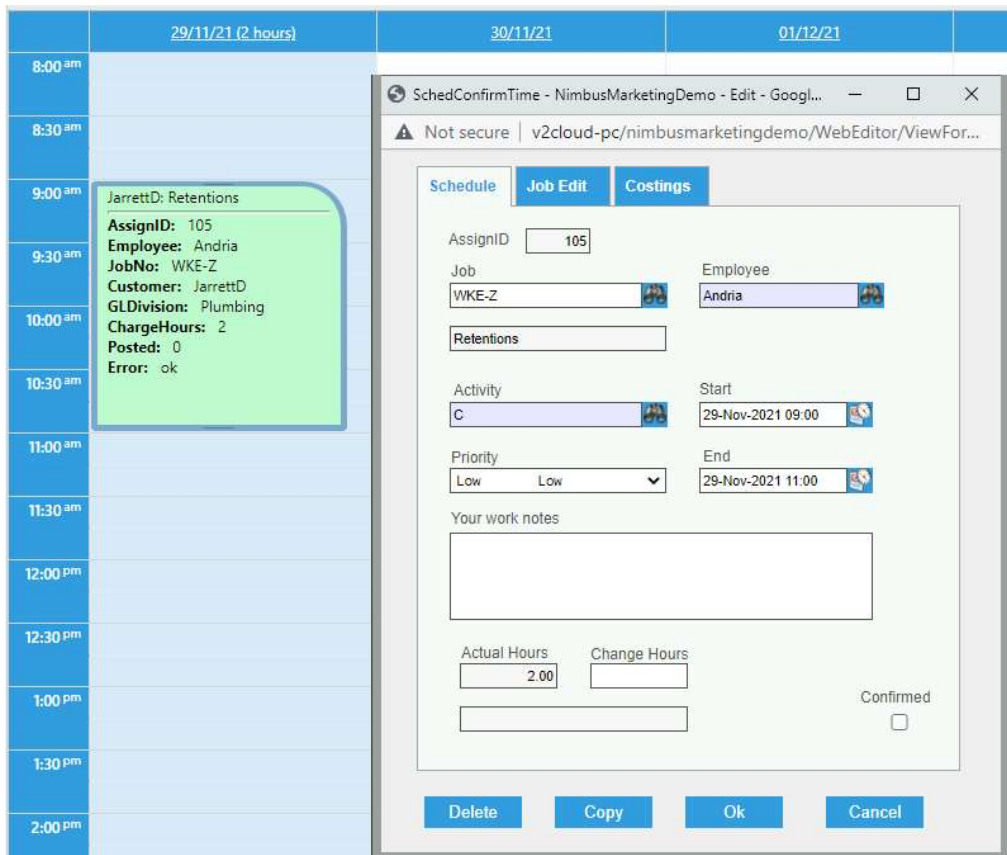
Enter and Confirm Time : Andria						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 Nov	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29 (2 hours) JarrettD: Retentions	30	1 Dec	2	3	4	5

Timeline:

Enter and Confirm Time : Andria											
29	30	1	2	3	4	5	6	7	8	9	10
2h											

Has a 12 day spread starting from today.

The Time Grid



The screenshot shows a time grid with a time slot from 9:00 am to 11:00 am on 29/11/21 highlighted in green. A modal window titled 'SchedConfirmTime - NimbusMarketingDemo - Edit - Googl...' is open over this slot. The modal contains the following information:

- Schedule** tab selected.
- AssignID: 105
- Job: WKE-Z
- Employee: Andria
- Customer: JarrettD
- GLDivision: Plumbing
- ChargeHours: 2
- Posted: 0
- Error: ok
- Activity: C
- Start: 29-Nov-2021 09:00
- Priority: Low
- End: 29-Nov-2021 11:00
- Your work notes: (empty text area)
- Actual Hours: 2.00
- Change Hours: (empty text area)
- Confirmed:
- Buttons: Delete, Copy, Ok, Cancel

By dragging a time space (e.g., 9:00 to 11:00am will open the above form.

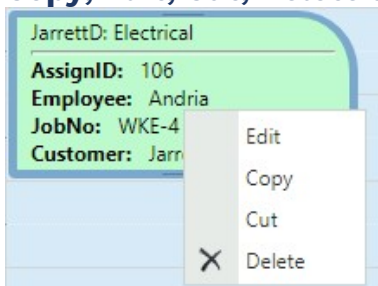
You complete the necessary details – e.g., choose the job number, choose the employee (if it is not defaulted to you) choose the activity, priority, work notes and charge hours (if they are to be different than what is worked).

The **Confirmed** tick box is to be ticked if you are confirming to your manager that that is the time you have worked; this would be relevant if you have scheduled the time and later come in to confirm that time. You will note that scheduled times are outlined with a colour that changes once you confirm the time; in our example the blue border above becomes white when confirmed:



9:00 am	JarrettD: Retentions
9:30 am	AssignID: 105 Employee: Andria JobNo: WKE-Z Customer: JarrettD
10:00 am	GLDivision: Plumbing ChargeHours: 2 Posted: 0
10:30 am	Error: ok

Copy, Edit, Cut, Delete and Paste



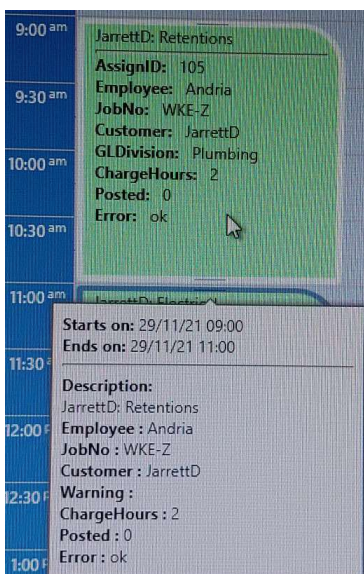
JarrettD: Electrical
AssignID: 106
Employee: Andria
JobNo: WKE-4
Customer: JarrettD

- Edit
- Copy
- Cut
- Delete

To edit an entry, you can either double click and it will open the entry or right click; which also activates the Copy, Cut, Delete and Paste options.

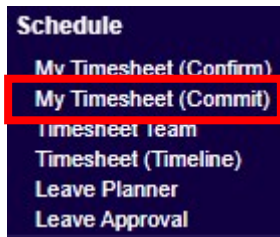
You can also drag the entry to change the time rather than editing the form.

A single left click on the form will give you information about that entry:

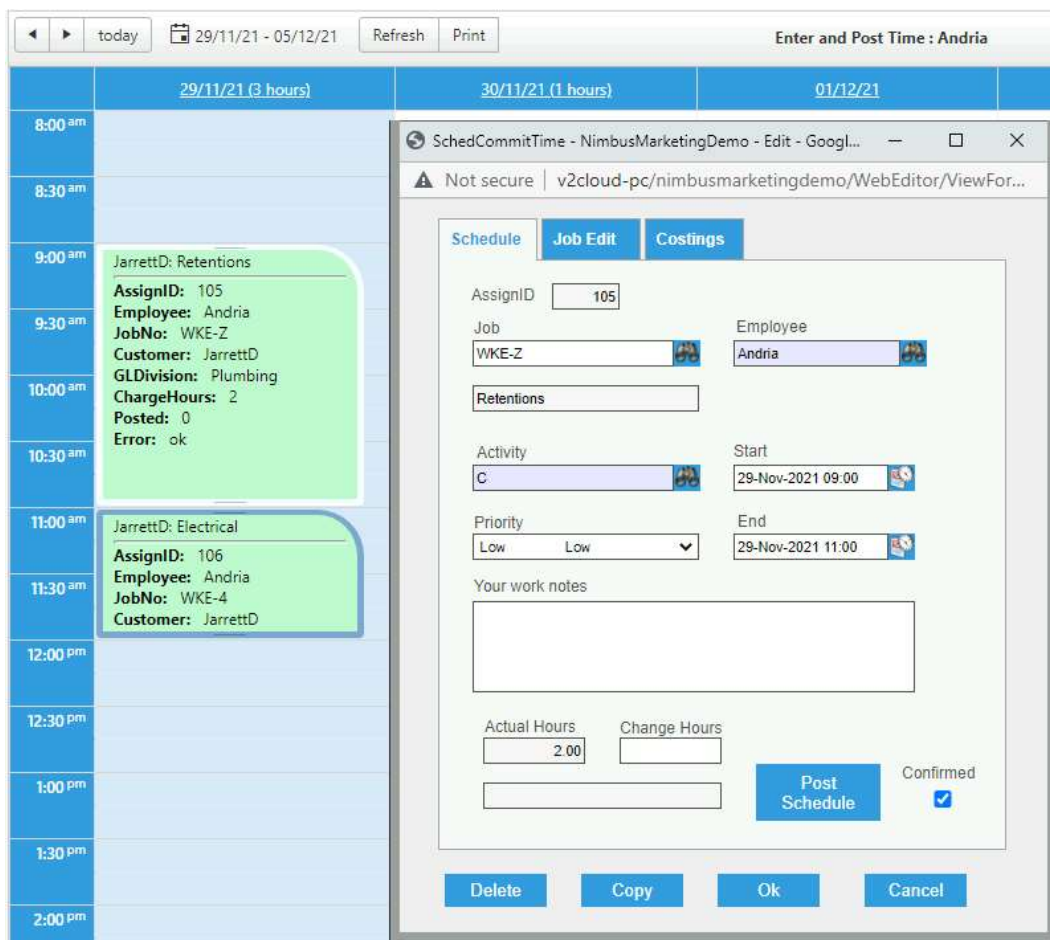


9:00 am	JarrettD: Retentions
9:30 am	AssignID: 105 Employee: Andria JobNo: WKE-Z Customer: JarrettD
10:00 am	GLDivision: Plumbing ChargeHours: 2 Posted: 0
10:30 am	Error: ok
11:00 am	JarrettD: Electrical
11:30 am	Starts on: 29/11/21 09:00 Ends on: 29/11/21 11:00
12:00 pm	Description: JarrettD: Retentions Employee: Andria JobNo: WKE-Z Customer: JarrettD
12:30 pm	Warning: ChargeHours: 2 Posted: 0
1:00 pm	Error: ok

My Timesheet (Commit) menu time



This brings up a similar form:

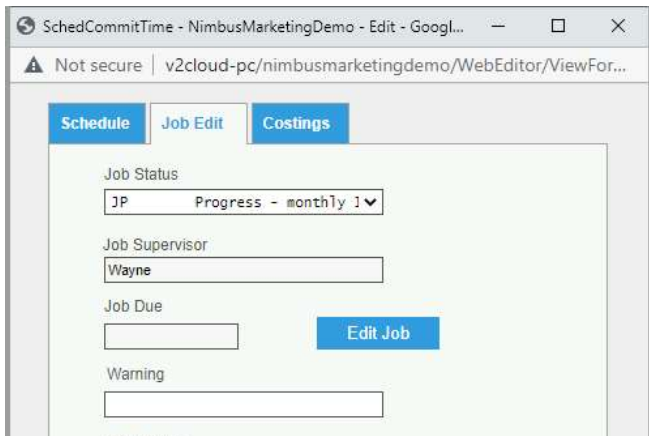


But with the Post Schedule button  activated; this as the name suggests posts the time posting through to the job and updates the general ledger etc. Obviously, this is only done when the time has been confirmed as being ready to post.

Other Tabs on the Schedule Time form

Job Edit Tab

This tab has a button on it which will allow you to edit the job:

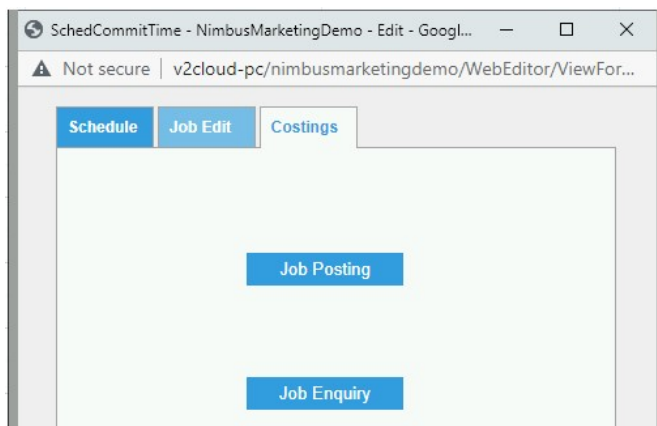


The screenshot shows a web browser window with the URL `v2cloud-pc/nimbusmarketingdemo/WebEditor/ViewFor...`. The page has three tabs: **Schedule**, **Job Edit**, and **Costings**. The **Job Edit** tab is active. The form contains the following fields:

- Job Status:** A dropdown menu showing "JP" and "Progress - monthly" with a downward arrow.
- Job Supervisor:** A text input field containing "Wayne".
- Job Due:** An empty text input field.
- Warning:** An empty text input field.

A blue button labeled **Edit Job** is positioned to the right of the Job Due field.

Costings Tab;

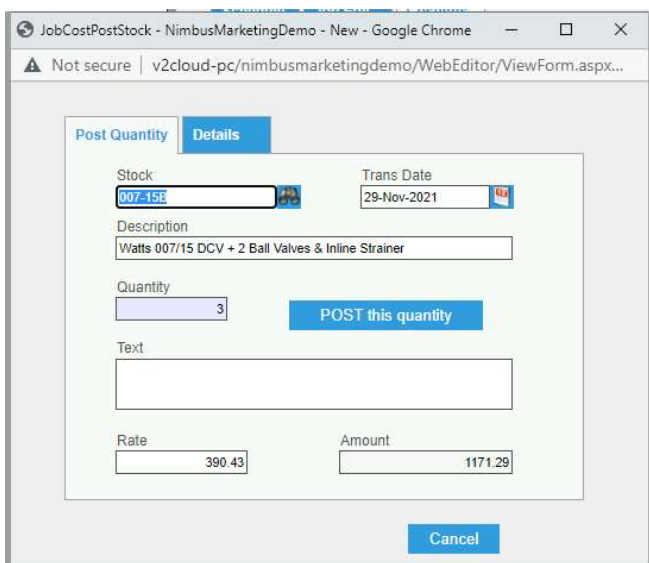


The screenshot shows the same web browser window, but the **Costings** tab is now active. The page contains two blue buttons:

- Job Posting**
- Job Enquiry**

Job Posting

Allows you to look up and post Stock and Plant items:



The screenshot shows a web browser window with the URL `v2cloud-pc/nimbusmarketingdemo/WebEditor/ViewForm.aspx...`. The page has two tabs: **Post Quantity** and **Details**. The **Details** tab is active. The form contains the following fields:

- Stock:** A text input field containing "007-15E".
- Trans Date:** A date input field containing "29-Nov-2021".
- Description:** A text input field containing "Watts 007/15 DCV + 2 Ball Valves & Inline Strainer".
- Quantity:** A text input field containing "3".
- Text:** An empty text area.
- Rate:** A text input field containing "390.43".
- Amount:** A text input field containing "1171.29".

There are two blue buttons: **POST this quantity** (located to the right of the Quantity field) and **Cancel** (located at the bottom center).

Job Enquiry:

Gives you the detailed job enquiry report

Job Details

JobID	1748	Closed	False
JobNumber	WKE-4	InvoiceQueue	Contract
JobDescription	Electrical	ProfitCentre	Div2
JobSupervisor	Wayne	Status	JP - Progress - monthly Inv
ContractDescription	New Workshop	Quoted_\$	9541.2600
CustomerName	Jarrett Developments	CostedCost_\$	17.6400
StartTime	30/10/2014 11:59:00 PM	Invoiced_\$	0.0000

Job Enquiry Detail : Job cost and items on order for listing, selection and drilling.

Filter : Job Number equals WKE-4

Branch	Client	Project	Job Number	Date	Sub Ledger	Section	Employ...	Code	Item Description	Quantity	Cost	Amount	Markup	Markup \$	Latest Co
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Stock			PDL17B	17B LIGHT FITTING ACC. PDL	40	\$784.80	\$981.00	25%	\$196.20	\$0.0
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Stock			20213670	CABLE CONDUIT WIRE 2.5 MM ORANGE	450	\$301.50	\$376.88	25%	\$75.38	\$0.0
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Stock			56S0420	56S0420 SOCKET OUTLETS PDL	30	\$1,193.70	\$1,492.13	25%	\$298.43	\$0.0
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Stock			PDL144	144 Flush Box PDL	30	\$120.00	\$150.00	25%	\$30.00	\$0.0
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Stock			56P516	56P516 PLUG 56 SERIES PDL	26	\$1,173.64	\$1,467.05	25%	\$293.41	\$0.0
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Stock			PDL582	582 2 GANG SWITCH PDL	6	\$60.96	\$76.20	25%	\$15.24	\$0.0
JarrettD	WKE	WKE-4	30/10/2014	Quoting	Time			LW	Workshop Engineer	85	\$3,570.00	\$4,998.00	40%	\$1,428.00	\$0.0
JarrettD	WKE	WKE-4	10/10/2021	Costing	Stock		Amy.La...	1255298	50 x 25 mm Rad Dressing DR MS 1	12	\$17.64	\$22.80	29%	\$5.16	\$17.6
JarrettD	WKE	WKE-4	22/09/2021	Ordered	Stock		Amy.La...	1455328	250 x 75 mm Douglas Fir SBG PG	2	\$22.00	\$27.50	25%	\$5.50	\$22.0
JarrettD	WKE	WKE-4	22/09/2021	Ordered	Stock		Amy.La...	1455328	250 x 75 mm Douglas Fir SBG PG	1	\$11.00	\$13.75	25%	\$2.75	\$11.0

Timesheet Team:

Powered By **Nimbus**

Search here...

- Enquiry
- Prospect
- JobFlow
- Mobile
- Tasks
- Schedule
 - My Timesheet (Confirm)
 - My Timesheet (Commit)
 - Timesheet Team
 - Timesheet (Timeline)
 - Leave Planner
 - Leave Approval

Allows you to view all the members of the team at once for a chosen day:

Schedule Staff Team									
	Adam	Amy.Lang	Andria	Aprakash	Brian	Grant	Jeremy	John	
8:00 am									
8:30 am									
9:00 am									
9:30 am									
10:00 am									
10:30 am									
11:00 am									
11:30 am									

JarrettL
Electrical
AssignID
107
JobNo:



Timesheet Timeline:

Powered By  Nimbus

Search here... 

- Enquiry
- Prospect
- JobFlow
- Mobile
- Tasks
- Schedule
 - My Timesheet (Confirm)
 - My Timesheet (Commit)
 - Timesheet Team
 - Timesheet (Timeline)**
 - Leave Planner
 - Leave Approval

Similarly shows all the teams schedules but for the timeline view – the next 10 days:

◀ ▶ today 📅 27/11/21 - 06/12/21 Refresh Print Staff - Timeline				
	27/11/21	28/11/21	29/11/21	30/11/21
Adam				
Amy.Lang				
Andria				
Aprakash				

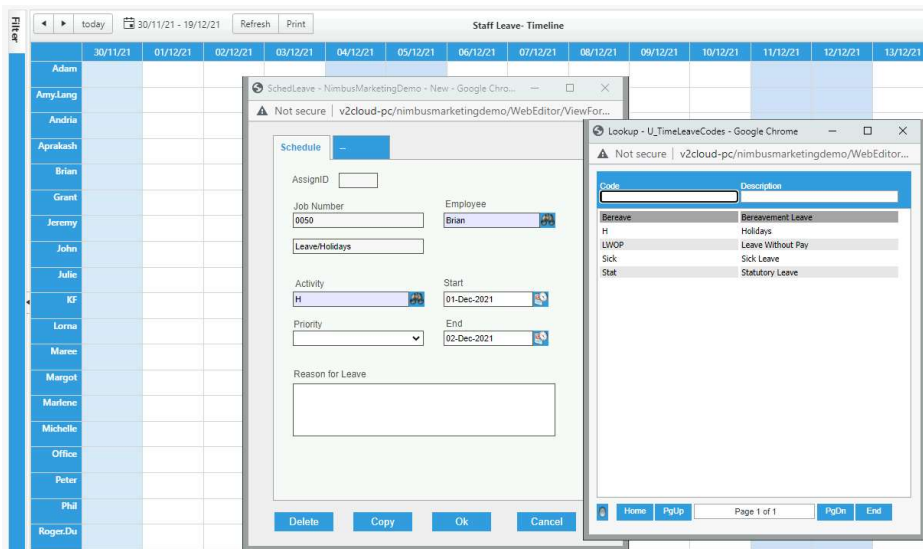
Leave Planner:

Powered By  Nimbus

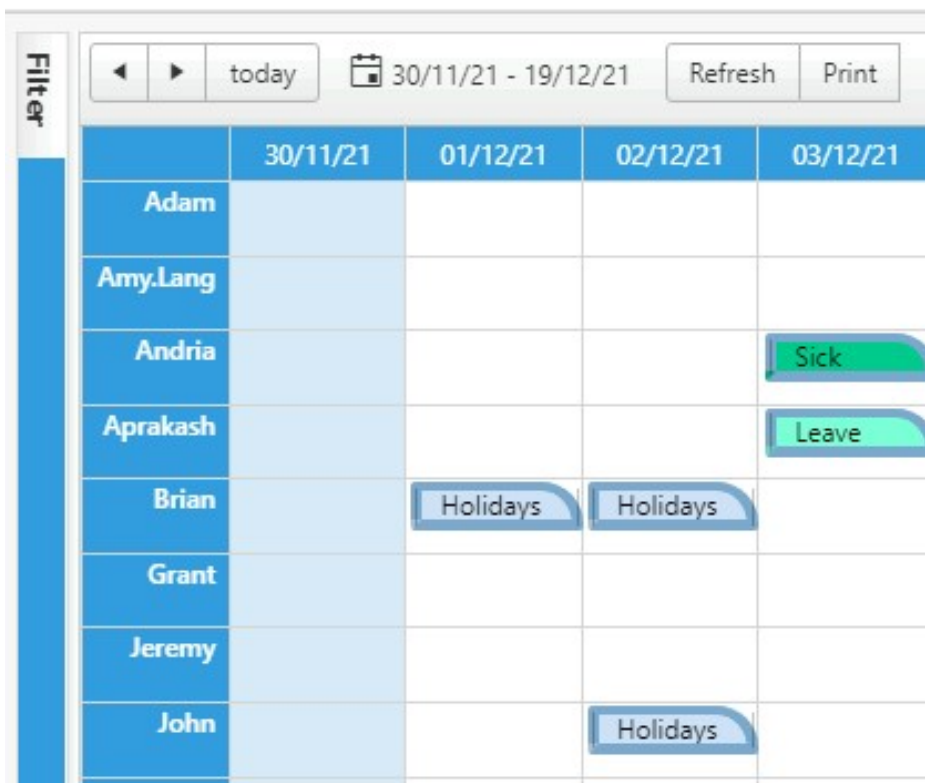
Search here... 

- Enquiry
- Prospect
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- Tasks
- Schedule
 - My Timesheet (Confirm)
 - My Timesheet (Commit)
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 - Timesheet (Timeline)
 - Leave Planner
 - Leave Approval

Allows you to plane and schedule in leave; by clicking on the appropriate employee and date the form has the default leave job, date, hours filled in and you choose the relevant leave type:



With the different leave types being colour coded:



The screenshot shows the 'Staff Leave-Timeline' interface with a calendar grid. The grid has columns for dates from 30/11/21 to 03/12/21 and rows for employees: Adam, Amy.Lang, Andria, Aprakash, Brian, Grant, Jeremy, and John. The leave types are color-coded: Sick (green), Leave (light green), and Holidays (blue).

Filter	30/11/21	01/12/21	02/12/21	03/12/21
Adam				
Amy.Lang				
Andria				Sick
Aprakash				Leave
Brian		Holidays	Holidays	
Grant				
Jeremy				
John			Holidays	

Leave Approval:

Powered By  Nimbus

Search here... 

- Enquiry
- Prospect
- JobFlow
- Mobile
- Tasks
- Schedule
 - My Timesheet (Confirm)
 - My Timesheet (Commit)
 - Timesheet Team
 - Timesheet (Timeline)
 - Leave Planner
 - Leave Approval

Has a similar format:

Staff Leave - Approve

Filter	today	30/11/21	01/12/21	02/12/21	03/12/21	04/12/21	05/12/21	06/12/21	07/12/21	08/12/21	09/12/21	10/12/21
Adam												
Amy.Lang												
Andria					Sick							
Aprakash					Leave							
Brian		Holidays	Holidays									
Grant												
Jeremy												
John			Holidays									
Julie												
KF												
Lorna												
Maree												
Margot												
Marlene												
Michelle												
Office												
Peter												
Phil												
Roger.Du												

SchedLeave Approval - NimbusMarketingDemo - Edit - Goo... X

Not secure | v2cloud-pc/nimbusmarketingdemo/WebEditor/ViewFor...

Schedule

AssignID:

Job Number: Employee:

Leave/Holidays:

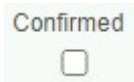
Activity: Start:

Priority: End:

Reason for leave:

Confirmed

but the edit form has the confirmed button for the manager to confirm the leave:



NB – the menu would be configured for the individual's user group's rights; for example, some user would schedule leave and the managers group would have the **Approval** function; similarly, the confirming and committing of time would be split by organisational function.