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1 Jobs Menu

magic5software
Data management for a
mobile workforce

1.1 Jobs Menu

Welcome to the **Jobs** menu for magic5.

The options under the Jobs menu are used by administrators to set up and view jobs on the magic5 system and, along with the Reports Menu, will be important to your everyday work if jobs are initiated by adminstrators rather than by the device users.

All jobs that appear on these lists must have a job definition and further information is available on the **Job definition help page ('Job definition' in the on-line documentation)**. However, a template for a form/report can be attached to any number of Job definitions - the name of the Job definition will appear at the top of the pop-up box for editing (see top right).
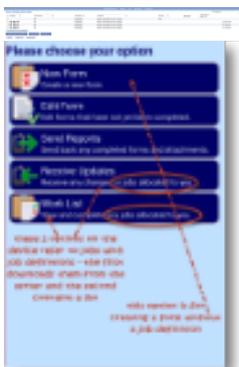
All the jobs lists have buttons for adding new jobs - please be aware that these new jobs will appear in the list that is appropriate to their status, rather than in the list from which they were created. In other words, clicking the button from the Completed jobs list and starting a job without a selecting a user will result in the job appearing in the Unallocated jobs list. Similarly, if a user is selected, the job will appear in the Outstanding jobs list until it has been Completed.
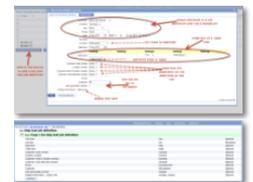
Right-click on an item to **Delete** it or **Save as ...** which effectively duplicates the job.

Left-click to bring up the job details (see top right) with entry fields based on the Job definition.

The menu contains the following options.

Unallocated jobs

The initial view shows any jobs which do not have either a date or a user or group of users. Jobs in this list will not be sent to any devices until they are allocated a date and a user or group (or both).

Outstanding jobs

The initial view shows any jobs which have been given all mandatory fields together with a date and a user and/or group of users. Jobs in this list will be received by allocated users when they sync their device.

Completed jobs

This list shows jobs that have been completed.

Schedule

The schedule option shows a consolidated calendar view of both unallocated and outstanding jobs.

*For more information on this menu item, visit the **Schedule (Section 1.2)** help.*

Planner

The planner option shows a consolidated calendar view of both unallocated and outstanding jobs. Days are shown from left to right and operatives vertically.

*For more information on this menu item, visit the **Planner (Section 1.3)** help.*

Buttons

At the bottom of the jobs list are a number of buttons. Some of these open the screen for setting up a new job and will be familiar as the text reads 'Add [name of job definition]'. Others are as follows.

Import jobs from spreadsheet	*This imports job data from a spreadsheet and requires answers to the following:*

- *Spreadsheet - follow the link to upload the required spreadsheet*
- *Spreadsheet format - select the appropriate format already set up as a list entry*
- *Job type - select the appropriate job definition from the drop-down list*
- *Template - select a template from the drop-down list. This will usually be the same as the template in the job definition, but a different one can be chosen*
- *Customer - select the name of the customer who supplied the spreadsheet from the drop-down list.*
- *Location - select the location that the spreadsheet refers to*
- *Job duration (mins) - this is the estimated length of time the job will take for scheduling purposes*

*For full details see **How to Import a job sheet ('Import a job sheet' in the on-line documentation)***

Delete	*Select which jobs need to be deleted using the tick box next to it and click this button. A confirmation box will appear after which the job will be permanently deleted.*
Export list	*This option sends the list of jobs to an Excel spreadsheet. For further information on bespoke formatting please contact magic5 support.*

Export data

This option sends data from the selected jobs to an Excel spreadsheet. For further information on bespoke formatting please contact magic5 support.

1.2 Schedule

The **Schedule** in magic5 shows a consolidated calendar view of both unallocated and outstanding jobs.

The jobs shown here are the same ones as appear in jobs lists but in a drag-n-drop environment.

Most adminstrators use the **Planner (Section 1.3)** in preference to the Schedule and the roles are very similar.

Calendar view

The calendar view can be modified by clicking on the buttons at the top right of the pane.

View users

Tick, or untick, the box to select which mobile device users you wish to view.

View a job

Click on a job to view the details.

Drag 'n' drop

Drag a job from the lefthand pane into the required date/time slot on the calendar. Use the 'handles' on the job to expand the allocated duration of the job.

1.3 Planner

The **planner** option shows a consolidated calendar view of both unallocated and outstanding jobs. Days are shown from left to right and operatives vertically.

The jobs shown here are the same ones as appear in jobs lists but in a drag-n-drop environment.

Most adminstrators use the Job Planner in preference to the Schedule and the roles are very similar.

Dates in view

The planner shows a week at a time. The arrows to the top left move backwards and forwards through the weeks and the down arrow brings up a calendar to select a specific date (the whole week will be shown). It is also possible to click 'Today' to return to the current date.

Users in view

*All users are displayed in the first column of the planner - that is to say all users with a role of 'user' rather than 'customer' or 'administrator'. If you do not see a user you expected to see, check whether that you are looking for firstname secondname and then check **Users in Setup/Maintenance ('Users' in the on-line documentation)** to see what **role ('User roles explained' in the on-line documentation)** they have been allocated.*

Jobs in view

Allocated jobs appear in the row with the allocated user's name in it and in the column for headed by the allocated date. Click on a job to view/amend the job details.

Unallocated jobs appear in the lefthand pane - they may have been allocated a user but not a date, or a date but not a user, or neither a date nor a user. Click on one of these jobs to view/amend the job details.

Drag 'n' drop

Drag a job from the lefthand pane into the required date/time slot on the calendar. Use the 'handles' on the job to expand the allotted duration of the job.

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