

## *Chapter 11*

# Supervising the Check-In Process

After a new shift of expected employee check-in records has been created and your drivers begin checking in, the Check-In Feature allows you the supervisor to easily see which employees have checked in and which have not. The Check-In Status screen automatically reviews and refreshes every driver's status every 60 seconds in the shift list. It also alerts you with a sound if a driver is late and then critically late to show up for work. Finally, the driver's check-in status is color coded depending on the check-in status of that driver.

In this chapter, the following topics should help you supervise the employee check-in process:

- Changing the View of Check-In Records
- Understanding the Color-Coding for Check-In Records
- Sorting Check-In Records
- Checking the Status for an Individual Employee or Vehicle
- Manually Checking Employees In

## Changing the View of Check-In Records

After you create a shift, the Employee Check-In software has several features to help you supervise the employee check-in status. As employees check in, the status of the check-in records changes, for example, from late to checked in. For this reason, the screen updates itself each 60 seconds so that you are viewing the most up-to-date status for the shift's check-in records.

After you create a shift, you can change the check-in records displayed by changing the Check-In Records to display option. You can choose from the following:

- **Late Only.** Displays check-in records for late employees. This is the default view.
- **Out.** Displays check-in records for employees who have not checked in but are not late.
- **All.** Displays all check-in records.

Select the viewing option you want, and click Find Now to update your view of this screen.



You can change your view of listed employees by selecting Late Only, Out, or All.

Displays the time the employee is scheduled to check in, the time he checked in, and the number of minutes he is late.

Minutes Late updates until the employee checks in. After he checks in, the field displays how many minutes he was late.

Figure 11-1. Viewing employees assigned to the selected shift

## Understanding the Color-Coding for Check-In Records

The Employee Check-In software color codes the check-in records so that you can easily distinguish their different statuses (for an example, see Figure 11-2):

- **Green.** Indicates employees who have checked in.
- **Black.** Indicates employees who have not checked in but are not late.
- **Orange.** Indicates employees who are late, meaning the current time is later than the time the employee was scheduled to check-in.
- **Red.** Indicates employees who are critically late. When the minutes the employee is past due, checking in is equal to or greater than the Number of Minutes Late to be Considered Critical setting in your Check-In District Options. (For more information regarding your Check-In District Options, see Chapter 12 in the *Getting Started* section.)

If you change your display setting to:

- **Late Only**—you will see all orange and red check-in records.
- **Out**—you will see all employees who have not checked in regardless of whether they are late or not.
- **All**—you will see all the check-in records.

As mentioned before, the Employee Check-In screen updates itself every 60 seconds. As the screen updates, you will records change colors as their status changes. For example, a check-in record might change from black (to indicate he is not checked in *or* late) to orange (to indicate he is late).



① **T.O.M Tip**

**Are there other ways the Check-In software can let me know if a driver becomes late or critically late?**

Yes. You can instruct the Check-In Status Screen to play a sound if the driver is late and a different sound if the driver is critically late. This feature can be useful during a busy time when you may not be watching the Check-In Status Screen closely. Having a sound play with either of these events draws your to the screen so that action can be taken on the missing driver. For more information, see Chapter 12, District Options, in the *Getting Started* section.

Green indicates an employee has checked in.

Red indicates employees who are critically late.

Orange indicates employees who are late.

Black indicates employees who have not checked in but are not late.

The screenshot shows the 'Employee Check-In' window. It has a menu bar with 'File', a toolbar with 'Check-In Records to Display' (radio buttons for 'Late Only', 'Out', and 'All'), and search/sort fields. Below is a table with columns: #, Last Name, First Name, Vehicle, Time Scheduled, Time In, Minutes Late, and In. The 'In' column is color-coded: green for 'True' and red for 'False'. The table lists 25 employees with their respective check-in times and minutes late.

| #           | Last Name    | First Name      | Vehicle | Time Scheduled | Time In | Minutes Late | In    |
|-------------|--------------|-----------------|---------|----------------|---------|--------------|-------|
| 434         | Bessy        | James           |         | 6:15 AM        | 6:02 AM | 0            | True  |
| nel562      | Nilcun       | Dawn            | 0       | 6:00 AM        |         | 17           | False |
| helm353     | Hilin        | Marina          | 36      | 6:00 AM        |         | 17           | False |
| 513         | Riyhnedt     | Sharon          | 91      | 6:00 AM        |         | 17           | False |
| TAR565      | Tesdyff      | Steve           | 46      | 6:00 AM        |         | 17           | False |
| liska294    | Lycke        | Sebrina         | 131     | 6:05 AM        |         | 12           | False |
| garreton290 | Gessitun     | Alexandra(Al... | 20      | 6:10 AM        |         | 7            | False |
| parkerj206  | Peskis       | Janene          | 155     | 6:15 AM        |         | 2            | False |
| porter504   | Pustis       | Sherry          | 63      | 6:15 AM        |         | 2            | False |
| 505         | Senesiyen    | Stacy           | 0       | 6:15 AM        |         | 2            | False |
| elgorin553  | elgesyn      | Cruz            | 23      | 6:15 AM        |         | 2            | False |
| pelomino91  | Pelunynu     | Evangelina(...  | 133     | 6:15 AM        |         | 2            | False |
| ortega493   | Ostige       | Nitza           | 158     | 6:15 AM        |         | 2            | False |
| obrier219   | O'Beyis      | KELLY           | 80      | 6:15 AM        |         | 2            | False |
| 251         | Riis         | VALERIE         |         | 6:20 AM        |         | 0            | False |
| hen058      | Hindiscun    | Lorrie          | 192     | 6:20 AM        |         | 0            | False |
| mul288      | Mullinyx yyy | Arthur          | 190     | 6:30 AM        |         | 0            | False |
| morrison472 | Mussycun     | Madeline-Ma...  | 128     | 6:30 AM        |         | 0            | False |
| kelso246    | Kilcu        | Linda           | 156     | 6:30 AM        |         | 0            | False |
| mccormac    | McDusneck    | Manv            | 103     | 6:30 AM        |         | 0            | False |

Figure 11-2. Understanding the color-coding of check-in records



① **T.O.M Tip**

**What's the difference between late and critically late?**

When you set up the software, you can specify the number of minutes to use for distinguishing between employees who are late and those who are critically late. The system uses those settings for determining the "degree of lateness," which is why check-in records for late employees can be orange or red.



## Sorting Check-In Records

In addition to selecting whether you want to view only late check-in records, records for employees who have not checked in, or all records, you can change the sort order that the check-in records display on the Check-In Status screen. For example, you can sort the records so that records showing employees who are critically late display at the top of the list, or you could sort them alphabetically by driver last name.

### To sort check-in records:

1. Click the Sorting tab. The Employee Check-In software displays the Sorting tab (Figure 11-3).
2. Select the sorting options you want to use.
3. Click the Find Now button to sort the check-in records.

Figure 11-3 shows that the check-in records are sorted according to Minutes Late, meaning that those records that are the latest display first:

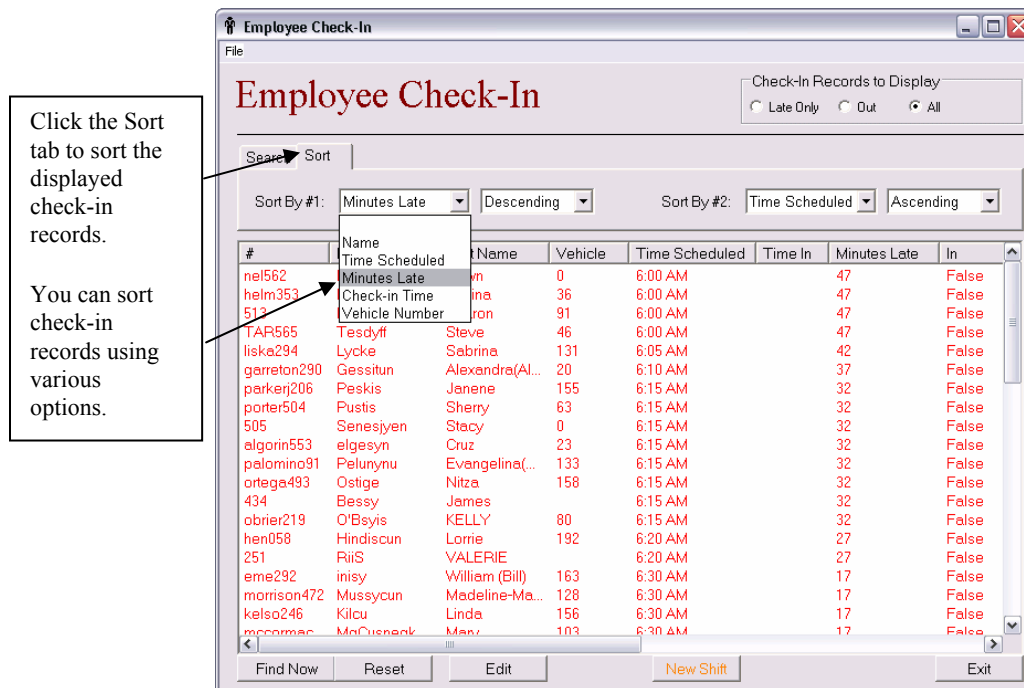


Figure 11-3. Changing the sort order of the Check-In Status screen



## Checking the Status for an Individual Employee or Vehicle

To review the status of a particular driver or vehicle you can, of course, simply scroll up and down the list of the drivers that are scheduled to check-in for this shift. However, if your district has more than a few dozen drivers, that may prove to be tedious. The Check-In Status screen allows you to quickly search the check-in status for a particular driver or for the driver of a particular vehicle.

*To check the check-in status for an individual employee:*

1. Either:

- Click the pull-down arrow, and select the employee's name from the drop-down list.

OR

- Click the Employee button (Figure 11-4). The Employee Check-In system displays the Find an Employee dialog (Figure 11-5).

Click here to search for an employee.

| #         | Last Name | First Name      | Vehicle | Time Scheduled | Time In | Minutes Late | In    | Trail |
|-----------|-----------|-----------------|---------|----------------|---------|--------------|-------|-------|
| nel562    | Nilcun    | Dawn            | 0       | 6:00 AM        |         | 2            | False | 9/20  |
| helm...   | Hilin     | Marina          | 36      | 6:00 AM        |         | 2            | False | 9/20  |
| 513       | Rymhesdt  | Sharon          | 91      | 6:00 AM        |         | 2            | False | 9/20  |
| TAR5...   | Tedyff    | Steve           | 46      | 6:00 AM        |         | 2            | False | 9/20  |
| liska2... | Lycke     | Sabrina         | 131     | 6:05 AM        |         | 0            | False | 9/20  |
| garret... | Gessitun  | Alexandra(Al... | 20      | 6:10 AM        |         | 0            | False | 9/20  |
| parke...  | Peskis    | Janene          | 155     | 6:15 AM        |         | 0            | False | 9/20  |
| porter... | Pustis    | Sherry          | 63      | 6:15 AM        |         | 0            | False | 9/20  |
| 505       | Senesjyen | Stacy           | 0       | 6:15 AM        |         | 0            | False | 9/20  |
| algoni... | elgesyn   | Cruz            | 23      | 6:15 AM        |         | 0            | False | 9/20  |
| palo...   | Pelunynu  | Evangelina(...  | 133     | 6:15 AM        |         | 0            | False | 9/20  |
| orteg...  | Ostige    | Nitza           | 158     | 6:15 AM        |         | 0            | False | 9/20  |
| 434       | Bessy     | James           |         | 6:15 AM        |         | 0            | False | 9/20  |
| obrier... | O'Bsyis   | KELLY           | 80      | 6:15 AM        |         | 0            | False | 9/20  |
| hen058    | Hindiscun | Lorrie          | 192     | 6:20 AM        |         | 0            | False | 9/20  |
| 251       | RuS       | VALERIE         |         | 6:20 AM        |         | 0            | False | 9/20  |
| eme2...   | inisy     | William (Bill)  | 163     | 6:30 AM        |         | 0            | False | 9/20  |
| morri...  | Mussycun  | Madeline-Ma...  | 128     | 6:30 AM        |         | 0            | False | 9/20  |
| kelso...  | Kilcu     | Linda           | 156     | 6:30 AM        |         | 0            | False | 9/20  |
| mcco...   | McCusneak | Mary            | 103     | 6:30 AM        |         | 0            | False | 9/20  |

Figure 11-4. Using the Employee button to search for an employee

- Select or type the criteria you want to use to search for the employee.
- Click the Find Now button.
- Select the employee's record, and click the OK button.



Figure 11-5 shows that Bekis was used as the search criteria and that Paul Bekis's record has been selected.

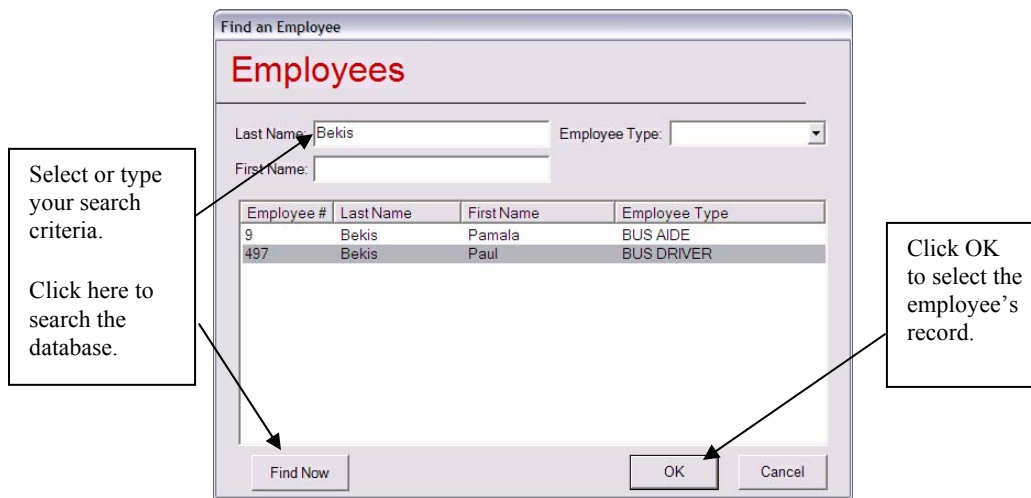


Figure 11-5. Viewing the check-in status of an employee or vehicle

2. Click the Find Now button on the Employee-Check In screen to display the employee's check-in record (Figure 11-6).

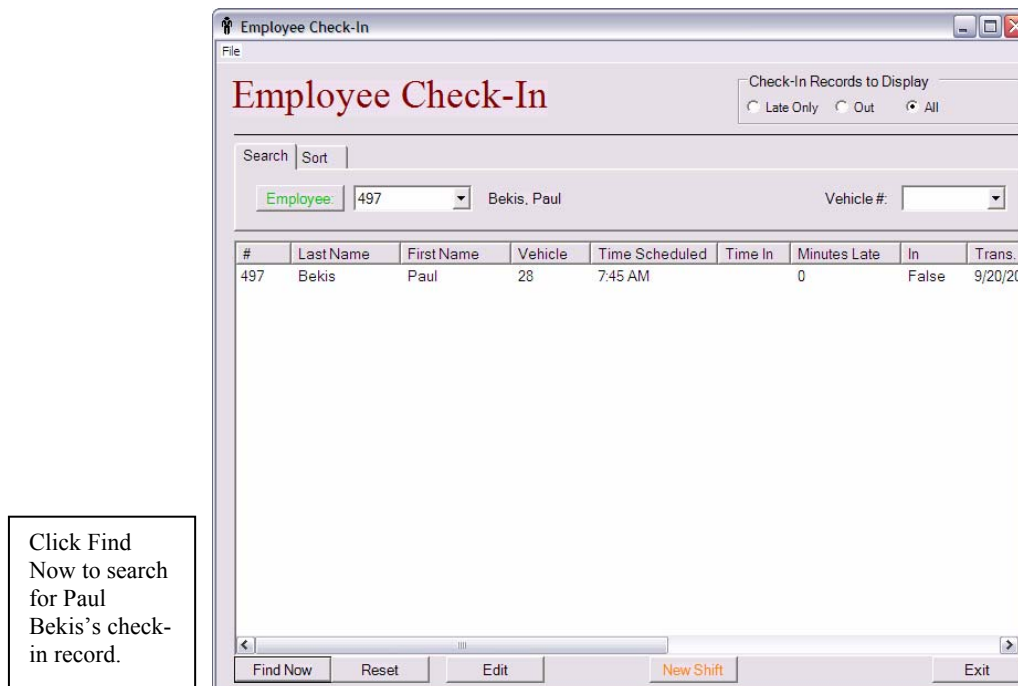


Figure 11-6. Viewing the check-in status of an individual employee



**To check the check-in status for an employee who is driving a particular vehicle:**

1. Select the vehicle number by clicking the pull-down arrow and selecting a vehicle number from the drop-down list (Figure 11-7)

The screenshot shows the 'Employee Check-In' window. At the top, there's a title bar and a menu bar with 'File'. Below the menu bar is a section titled 'Employee Check-In' with a subtitle 'Check-In Records to Display' and radio buttons for 'Late Only', 'Out', and 'All'. There are 'Search' and 'Sort' tabs. Below these are two dropdown menus: 'Employee:' and 'Vehicle #:'. The 'Vehicle #' dropdown is open, showing a list of vehicle numbers from 172 to 177. Below the dropdowns is a table with columns: '#', 'Last Name', 'First Name', 'Vehicle', 'Time Scheduled', 'Time In', and 'Minutes Late'. The table contains several rows of employee data. At the bottom of the window are buttons: 'Find Now', 'Reset', 'Edit', 'New Shift', and 'Exit'.

Click the pull-down arrow, scroll to the vehicle number you want to select, and click on it.

Click Find Now to search for the vehicle number.

Figure 11-7. Selecting a vehicle number to search on

2. Click the Find Now button to search for the check-in record for the employee assigned to the selected vehicle number (Figure 11-8).

The screenshot shows the 'Employee Check-In' window after a search. The 'Vehicle #' dropdown is now set to '28'. The table below shows the results of the search, with one row visible: # 497, Last Name Bekis, First Name Paul, Vehicle 28, Time Scheduled 7:45 AM, Time In 0, Minutes Late 0, In False, and Trans. 9/20/20. The 'Find Now' button is highlighted in orange.

Figure 11-8. Results of searching check-in records using the vehicle number



Now that I searched for individual check-in records, how can I view all of them again?

① **T.O.M Tip**

If you click the Reset button, the search parameters you entered are cleared and the Check-In Records to Display option is reset to Late Only, the default view. However, the shift records are NOT discarded. For this reason, when you click the Reset button and click the Find Now button, none of your shift records will display if none of them are late. If you simply click the view back to All you will see them.

## Manually Checking Employees In

Sometimes drivers forget to check-in at the Check-In workstation when they report for work. Therefore, the Check-In Status screen shows the driver as still out, but you know that the driver has, in fact, reported for work. Rather than forcing drivers to go to the driver check-in workstation (which can be a real problem if they have already left to drive their bus route) and check-in, the Check-In Feature allows the you to manually check them in.

The following are the steps the supervisor must take to manually check-in a driver:

1. Select the employee you want to check in (Figure 11-9).
  2. Either:
    - Select the employee's record, and click Edit.
- OR
- Double-click the employee's record.

The screenshot shows the 'Employee Check-In' window. At the top, there's a title bar and a menu bar. Below the menu bar, there's a section titled 'Employee Check-In' with a 'Check-In Records to Display' dropdown set to 'All'. There are search and sort buttons, and a 'Vehicle #' dropdown. Below this is a table with columns: #, Last Name, First Name, Vehicle, Time Scheduled, Time In, Minutes Late, and In. The table lists several employees, with the first few highlighted in red. The 'Edit' button is highlighted at the bottom of the window.

| #           | Last Name  | First Name      | Vehicle | Time Scheduled | Time In | Minutes Late | In    |
|-------------|------------|-----------------|---------|----------------|---------|--------------|-------|
| 434         | Bessy      | James           |         | 6:15 AM        | 6:00 AM | 0            | True  |
| nel562      | Nilcun     | Dawn            | 0       | 6:00 AM        |         | 15           | False |
| helm353     | Hilin      | Marina          | 36      | 6:00 AM        |         | 15           | False |
| 513         | Riyhesdt   | Sharon          | 91      | 6:00 AM        |         | 15           | False |
| TAR565      | Tesdyft    | Steve           | 46      | 6:00 AM        |         | 15           | False |
| liska294    | Lycke      | Sabrina         | 131     | 6:05 AM        |         | 10           | False |
| garreton290 | Gessitun   | Alexandra(AI... | 20      | 6:10 AM        |         | 5            | False |
| parkerj206  | Peskis     | Janene          | 155     | 6:15 AM        |         | 0            | False |
| porter504   | Pustis     | Sherry          | 63      | 6:15 AM        |         | 0            | False |
| 505         | Senesjyen  | Stacy           | 0       | 6:15 AM        |         | 0            | False |
| algorin553  | elgesyn    | Cruz            | 23      | 6:15 AM        |         | 0            | False |
| pelomino91  | Pelunynu   | Evangelina(...  | 133     | 6:15 AM        |         | 0            | False |
| ortega493   | Ostige     | Nitza           | 158     | 6:15 AM        |         | 0            | False |
| obrier219   | O'Bsyis    | KELLY           | 80      | 6:15 AM        |         | 0            | False |
| 251         | RuiS       | VALERIE         |         | 6:20 AM        |         | 0            | False |
| hen058      | Hindiscun  | Lorrie          | 192     | 6:20 AM        |         | 0            | False |
| mul288      | Mullinxyyy | Arthur          | 190     | 6:30 AM        |         | 0            | False |
| morrison472 | Mussycun   | Madeline-Ma...  | 128     | 6:30 AM        |         | 0            | False |
| kelso246    | Kilcu      | Linda           | 156     | 6:30 AM        |         | 0            | False |
| mccormac    | McCormack  | Manz            | 103     | 6:30 AM        |         | 0            | False |

Select the employee's record, and click Edit.

You can also double-click the employee's record.

Figure 11-9. Selecting an employee to manually check in





The Employee Management system displays the Administration Check-In Edit screen (Figure 11-10).

3. Check the In box to check the employee in. When you click this box, the Employee Management system uses the time on your system to complete the Time in box and calculates the number of minutes the employee was late, if any.
4. Type any administrative notes you want to save with the check-in record. These notes are optional, but they can be useful later for such uses as employee year-end reviews.

Figure 11-10, for example, shows that the employee was scheduled to be in at 6:10 a.m. The administrator checked her in at 6:18 a.m., so the system calculated that she was 8 minutes late. Additionally, the administrator added notes to her check-in record.

The screenshot shows the 'Administration Check-In Edit' window. It contains the following fields and controls:

- Employee:** #290 Gessitun, Alexandra(Alex)
- Date:** 9/20/2004
- Shift:** Morning
- Description:** am
- In:** A checked checkbox.
- Time Scheduled:** 6:10 AM
- Time In:** 6:18 AM (with a clock icon)
- Minutes Late:** 8
- Employee Message:** (empty text box)
- District Message:** All hands meeting at noon on Wednesday, Sept. 22.
- Confirm:** An unchecked checkbox.
- Administration Notes:** Her car wouldn't start this morning.
- Buttons:** OK and Exit.

Callouts provide additional information:

- A box on the left states: "You can add administrative notes here. These notes are optional, but you might find them very useful, for example, for employee year-end reviews." with an arrow pointing to the Administration Notes field.
- A box on the right states: "Click in the In box to check the employee in." with an arrow pointing to the In checkbox.
- Another box on the right states: "The Employee Management system uses your system's time to complete the Time In field and calculates the number of minutes the employee was late." with an arrow pointing to the Time In field.

Figure 11-10. Checking in an employee

5. Click the OK button to check the employee in.