

## Chapter 9

# Employee Shift Lookup Lists

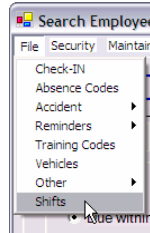
When using the T.O.M. Employee Management Check-In Feature, you are going to create new shifts many times a day. When you create a new shift, you simple enter a beginning and ending time of the shift. To save you time, the Check-In Feature allows you to pre-enter these time ranges and just call them up when you are ready to start a new shift. We call these time ranges 'shifts' but they really are just memorized sets of beginning and ending times to save you the trouble of repeatedly typing these time ranges in day after day of starting a new shift in the Employee Management Check-In Feature.

This section explains the following:

- Adding a New Shift
- Editing or Changing Shifts to Inactive
- Deleting Shifts

### Adding a New Shift

1. Select File>Shifts (Figure 9-1).



*Figure 9-1. Selecting File>Shifts*

The Employee Management system displays the Lookup Shifts screen (Figure 9-2).

2. Click the New button.

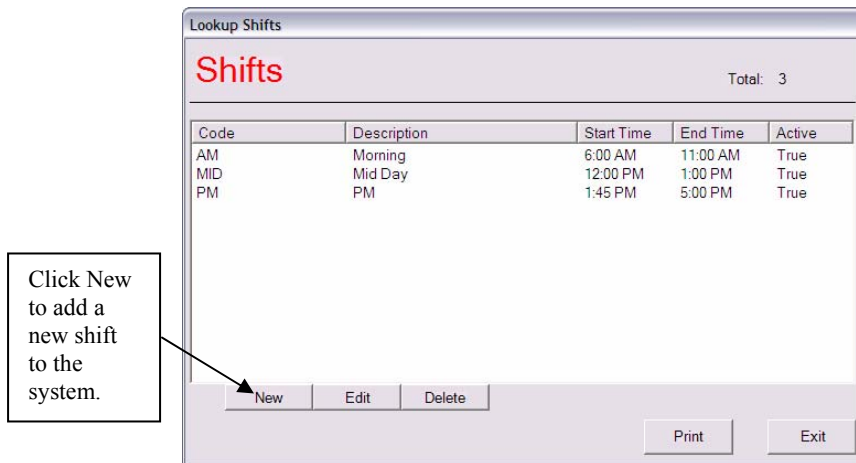


Figure 9-2. Lookup Shifts screen

The Employee Management system displays the Shift screen.

3. Type the shift name and description (Figure 9-4).
  - **Shift.** Allows you to enter up to 20 alphanumeric characters, meaning you can code both letters and numbers. This is a required field.
  - **Description.** Allows you to enter up to 50 alphanumeric characters.
  - **Start Time.** Allows you to select the beginning time of the time range that you would like to use to select all employee routes that occur within the shift. Click the clock icons to select a time from the pop up timeclock screen (Figure 9-3) or simply enter the time.
  - **End Time.** The ending time of the time range that you would like to use to select the employee routes that occur within the shift. Click the clock icons to select a time from the popup timeclock screen (Figure 9-3) or simply enter the time.



Figure 9-3. Time Selection screen

- **Active.** When selected, specifies that the shift can be assigned to employee routes.
4. Click the clock icons to select the time the shift starts and ends.
  5. Make sure the Active checkbox has a check in it. If it does not, the shift will not appear in the Shift pull-down list on the New Shift screen.

Figure 9-4 shows adding a shift of PM Extracurricular for Afternoon Extracurricular activities; the shift is scheduled from 4:00 p.m. to 6:00 p.m.:



Click OK to add the shift to the system.

Shift
Shift

Shift:

Description:

Start Time:

End Time:

☒ Active

OK
Exit

Figure 9-4. Adding a new shift

- Click the OK button to add the shift to the system.

### Editing or Changing Shifts to Inactive

In addition to being able to edit shifts, you can change them to inactive. The advantage of changing them to inactive rather than deleting them is that the shift still exists in the system but does not display in the Shift pull-down list.

**To edit a shift or change it to inactive:**

- To edit the shift or change it to inactive, select it and click Edit, or double-click on it to display the Lookup Shifts screen (Figure 9-5).

Select the shift you want to edit.  
  
 You can also double-click the shift to display the Shifts screen.

Lookup Shifts
Shifts
Total: 4

| Code               | Description               | Start Time | End Time | Active |
|--------------------|---------------------------|------------|----------|--------|
| AM                 | Morning                   | 6:00 AM    | 11:00 AM | True   |
| MID                | Mid Day                   | 12:00 PM   | 1:00 PM  | True   |
| PM                 | PM                        | 1:45 PM    | 5:00 PM  | True   |
| PM Extracurricular | Afternoon Extracurricular | 4:00 PM    | 6:00 PM  | True   |

New
Edit
Delete

Print
Exit

Figure 9-5. Selecting a shift

- Make your changes to the screen. Figure 9-6 shows that the PM Extracurricular shift has been changed to Inactive:



Shift: PM Extracurricular

Description: Afternoon Extracurricular

Start Time: 4:00 PM

End Time: 6:00 PM

☐ Active

OK Exit

Figure 9-6. Changing a shift to Inactive

## Deleting Shifts

If you delete shifts, you are removing them from the system. Rather than doing this, you might consider changing them to inactive. That way, it still exists in the system but does not appear in the pull-down lists.

### To delete a shift:

1. Select the shift you want to delete.
2. Click the Delete button (Figure 9-7).

Lookup Shifts

Shifts Total: 4

| Code               | Description               | Start Time | End Time | Active |
|--------------------|---------------------------|------------|----------|--------|
| AM                 | Morning                   | 6:00 AM    | 11:00 AM | True   |
| MID                | Mid Day                   | 12:00 PM   | 1:00 PM  | True   |
| PM                 | PM                        | 1:45 PM    | 5:00 PM  | True   |
| PM Extracurricular | Afternoon Extracurricular | 4:00 PM    | 6:00 PM  | True   |

New Edit Delete Print Exit

Select the shift you want to delete.

Then, click the Delete button.

Figure 9-7. Deleting a shift

The Employee Management system asks if you are sure to want to delete the shift.

3. Click the Yes button to delete the shift.