Chapter 9

Creating a New Shift and Employee Messages

What is a shift? A shift is nothing more than a list of drivers who are scheduled to drive a route for that day and during the range of times that you specified.

For example, if you want the morning shift to be between 6:00 AM to 8:30 a.m.:

- The Check-In feature reviews all the driver routes and builds a list of drivers who have routes scheduled for the current day and who have a start time between the time range specified. In this case, the built list would include all drivers scheduled to drive today between 6:00 a.m. and 8:30 a.m.
- The list of drivers built has all of the drivers marked as "out" and the time the drivers are expected to report to work. All drivers are out until they check in.
- When calculating the employee's time to work, the software uses the driver's route starting time and subtracts from it the Number of Minutes to Subtract from a Bus Run's Start Time setting that you entered in your Employee Management Check-In District Options.

  In this example, if Paul Bekis had a route start time of 6:00 a.m., the Check-In software would expect him to report to work at 5:55 a.m. (For more information about this and other Check-In District Option, refer to Chapter 12 in the *Getting Started* section.)

What's the relationship between the shift records and the archive database?

When you have finished checking-in all employees for a shift, you can create a new shift of employees to check-in for a later part of the day or for a new day. When doing this, you are asked if you want to save the current shift records into an archive database. T.O.M. uses this archive database for historical reporting that can be used to create a report, for example, that shows how often Nikki Smith checked-in late.

Before employees can begin checking in, you need to create a new shift. When you create a new shift, the Employee Check-In software gives you the option of saving the check-in records to the archive. The archive contains each shift you create, and it is the archived data that is used when you create check-in reports. You are not required to archive each shift you create, but if you decide not to archive the check-in data, you will not be able to include that shift in any reports because it wasn't saved to the archive.

What's in this chapter?

This chapter includes the following topics:

- Creating a New Shift
- Creating Messages that Display When Employees Check-In

Creating a New Shift

After you start the Employee Check-In software, you need to create a shift so that you can see which employees have checked in and who is late.

This section consists of these two parts:

- **Creating a New Shift.** Explains how to create a shift so that you can supervise the check-in process.
- **Understanding the New Shift Screen.** Explains the fields on the New Shift screen.

ⓘ ***T.O.M Tip***

Where do the shift names come from?

Part of setting up the Check-In software is creating the shift names. To begin adding shifts, select File>Shifts. One of the shift fields that needs to be completed is Description. The name typed into the Description field is the name that appears in the Shift drop-down list in the New Shift screen. You can learn more about this in Chapter 10 of the *Getting Started* section.

Creating a Shift

1. Start the check-in feature by selecting File>Check-In in the Employee Management system (Figure 9-1).

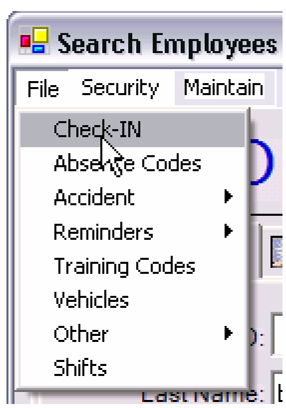

Figure 9-1. Launching the Employee Check-In software

The Employee Management system displays the Employee Check-In screen. This screen will not display any information until you create a shift.

2. Click the New Shift button (Figure 9-2).

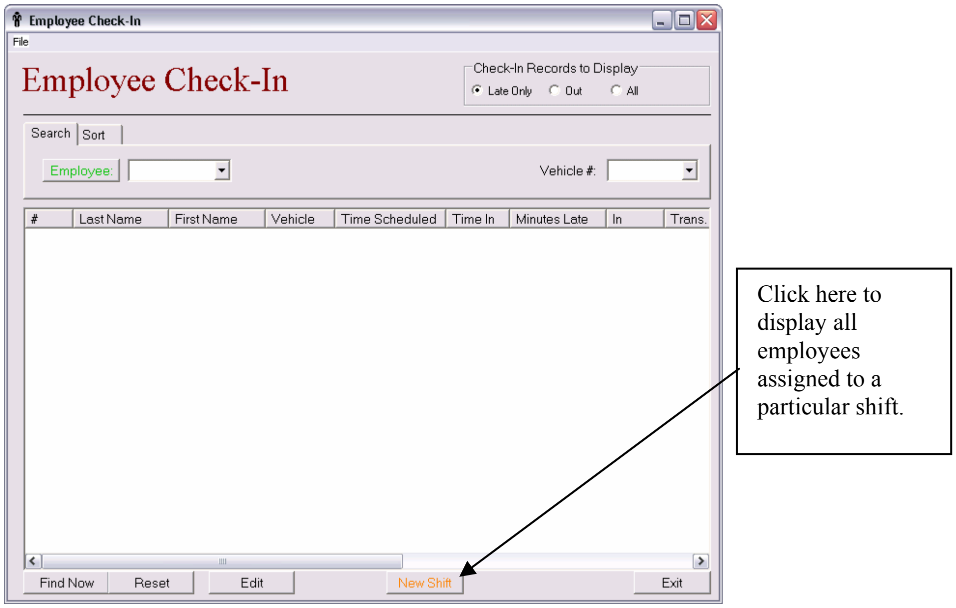

Figure 9-2.Viewing employees assigned to a shift

The Employee Management system displays the New Shift screen(Figure 9-3).

3. Select the shift you want to create from the Shift pull-down arrow. The Shift drop-down lists displays the list of predefined shifts that your district has created and added to the system.

   The Employee Management system displays the shift beginning and ending times that were selected when the shift was added to the system.

4. Select Save Current Information into Archive File if you want to save the existing shift's check-in results in your archive database for lookup and reporting purposes.

5. Click Create New Shift.

   Figure 9-3 shows that the AM shift has been selected. The Employee Management system displays the shift's starting (6:00 a.m.) and ending times (11:00 a.m.)

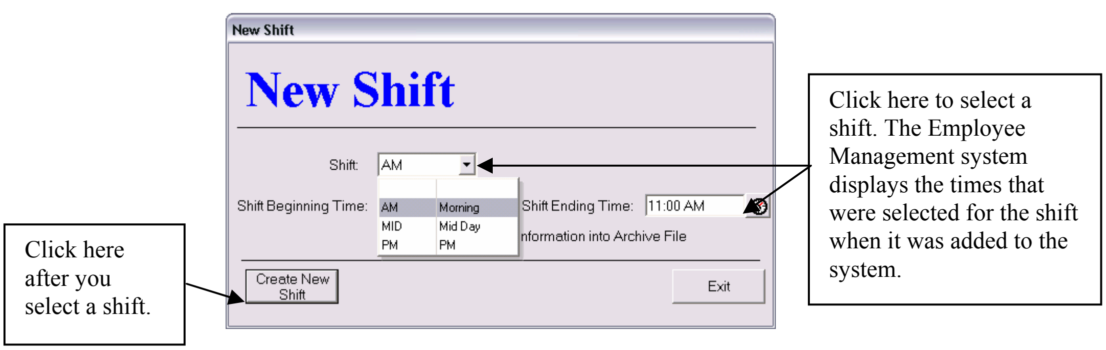

Figure 9-3. Selecting the shift you want to create

ⓘ ***T.O.M Tip***

Do I have to use a pre-established shift or that shift's time range?

No. The pre-established shifts are merely meant to be used as a convenience for the dispatchers as they starting new shifts throughout the day. The user can always just enter a time range "on the fly" in the New Shift screen. The New Shift routine then uses the time range entered when building a list of employees that are to report for work.

Figure 9-4 shows that all the employees who are expected to report for work in the specified time range for this day.

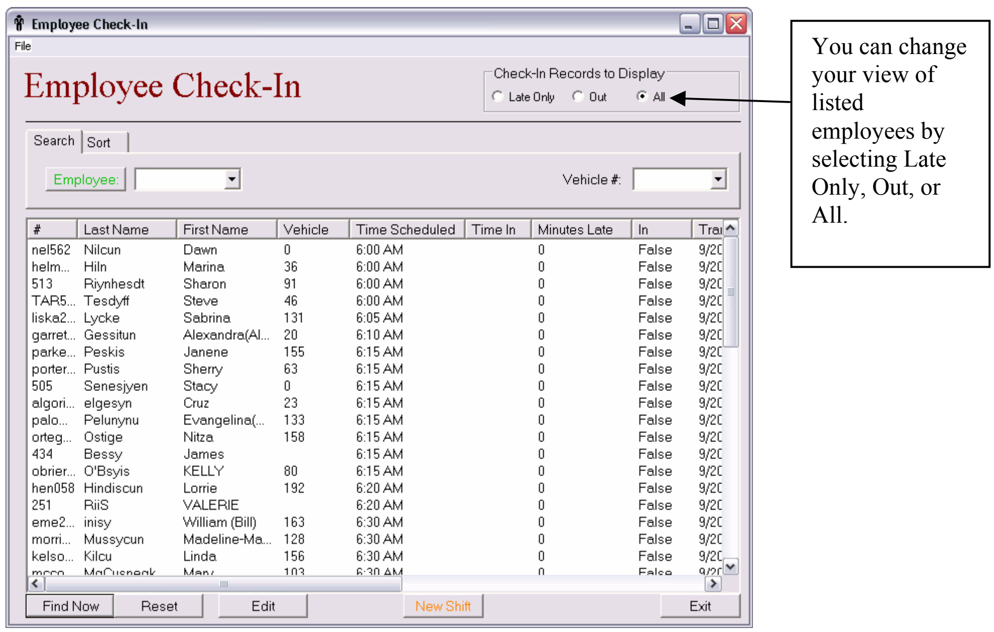

Figure 9-4. Viewing employees assigned to the selected shift

ⓘ ***T.O.M Tip***

I tried to create a shift, but nothing displays in the Employee Check-In screen.

Make sure you have completed all the required setup steps described in Chapter 8. If you have done this, look at the display option that is selected in the upper right corner of the screen. For example, if Late Only is selected but no employees are late, no records will display. Change the display option to All and click the Find Now button.

Understanding the New Shift Screen

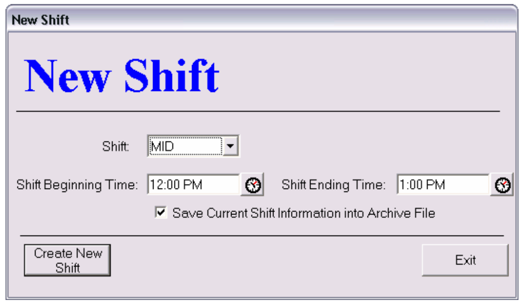

Figure 9-5. New Shift screen

You can select the following on this screen:

- **Shift.** Allows you to select a shift from the pull-down arrow. When you click the pull-down arrow, the Employee Management system lists all shifts that been added to the system. Because you are required to add a shift's beginning and ending time when adding a shift to the system, the Employee Management system displays those times in Shift Beginning Time and Shift Ending Time when you select a shift in this screen. This not only saves you time but prevents you from selecting the wrong times in those fields.
- **Shift Beginning/Ending Time.** Displays the selected shift's starting and ending time for the selected shift. You can change these fields if you need to; the pre-established shifts are merely meant to be used as a convenience for the dispatchers as they starting new shifts throughout the day. You can always just enter a time range "on the fly" in the New Shift screen. The New Shift routine then uses the time range entered when building a list of employees that are to report for work.
- **Save Current Shift Information into Archive File.** When checked, adds the check-in data to your database so that you can later include that information in reports. For example, suppose you need to create a report showing how often a particular employee was late. If you archive the shift check-information, you can easily do that using the Employee Management system's reporting feature. If, however, you do not turn this option on, no check-in data for this shift will be saved in your database.

ⓘ ***T.O.M Tip***

What if I accidentally selected the wrong shift or entered the wrong time range and created a new shift that is not right?

If this happens, just click the New Shift button again, select the correct shift or enter the correct time range, and UNCHECK the Save Current Shift Information into Archive File check box. Then click the Create New Shift button. This causes the New Shift routine to simply discard the wrong list of employees and rebuild the list of employees that are expect to report to work correctly.

Won't the archive be huge if I add information to it every time I create a shift for employees as they check in?

You should be able to comfortably keep a year's worth of check-in history before purging. However, you can use the Check-In History Purge routine by selecting File>Purge in the Employee Check-In screen. This is discussed in Chapter 12.

Creating Messages that Display When Employees Check-In

The Check-In feature allows you to enter messages that are to display on the Employee Check-In Screen when the employees are checking in. There are two types of check-in messages you can set up:

- **District-Wide Messages.** Displays for all employees in a shift (or shifts) when they check-in.
- **Specific Employee Messages.** Displays only for the selected employee for that one shift.

Both are discussed in the next sections of this chapter.

District-Wide Messages

When you add a district-wide message to the Employee Check-In software, all employees see the message when they check in, and they can click the Confirm button to acknowledge they received the message.

As part of setting up the message, you can specify the days or times you want the message to display. For example, you might need to create a message about an all hands meeting that has been scheduled for all employees September 22. When you create the message, you can set it up so that it displays from September 14 through September 22.

You can also set up the message using time instead of dates. For example, you can create a message that displays for all employees who check in between 5:30 a.m. and 8:30 a.m. if the message is only applicable to first shift employees.

Another option you have is to leave the date and time fields blank. If you do that, the message displays for all employees until you remove it from the system.

One important thing to remember about creating district wide messages is that you need to add the message to the Employee Check-In software **before you create a shift**. If you create a shift before you add a message that is supposed to display that same day, employees will not see it. Therefore, be sure that if the message needs to be displayed today, add it to the system *before* you create a new shift.

To create a district-wide message:

1. Select File>Other>District Options in the Employee Management system (Figure 9-6).

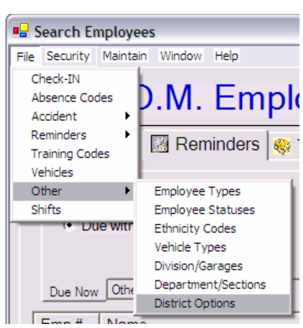

Figure 9-6. Selecting File>Other>District Options

The Employee Management system displays the T.O.M. District Options screen.

2. Click the Employee Management button.

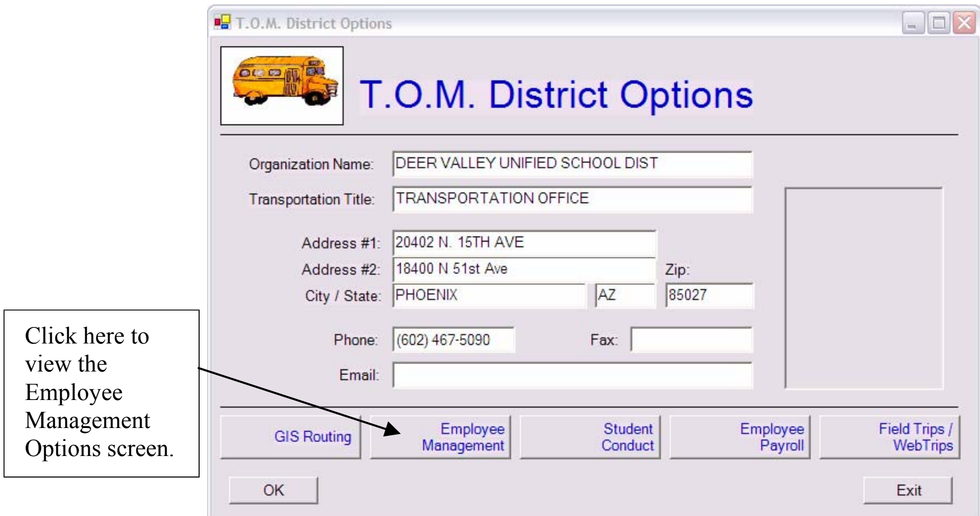

Figure 9-7. T.O.M. District Options screen

The Employee Management system displays the Employee Management Options.

3. Click the Check-in tab.

4. Type your message into the Message for All Employees box.

5. Either:

- Click the From pull-down arrow, and select the date you want the message to begin displaying. do the same thing for the To field.

OR

- Type the date into the From and To fields. If you specify only a month and year, the first of the month is used as the default value.

OR

- Leave the date and time ranges blank and the message will display for all employees for all shifts continuously until you go back and remove the message.

Figure 9-8 shows adding a message about an all-hands meeting that begins displaying on September 14 and continues displaying until September 22.

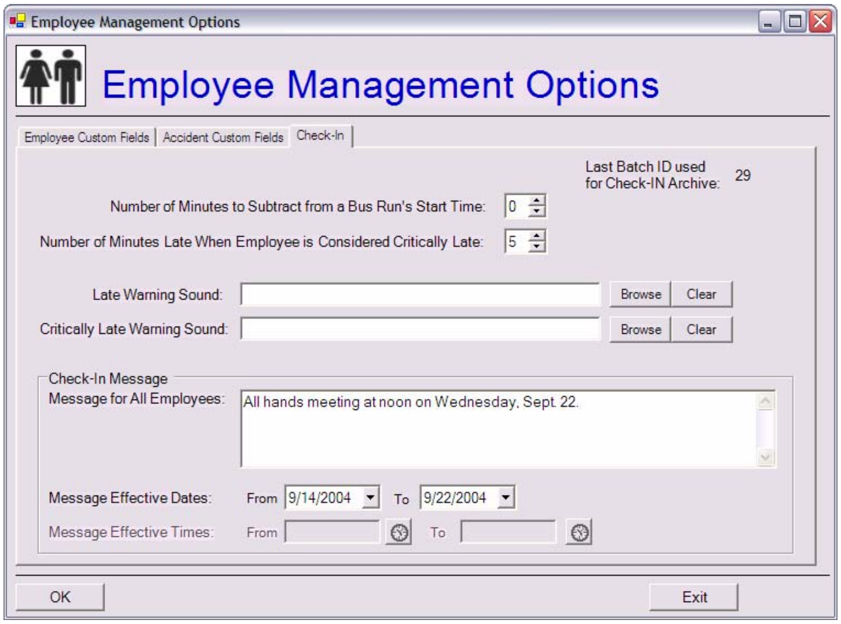

Figure 9-8. Adding a district-wide message

After employees log into the system, they see the message displayed on the check-in screen (Figure 9-9):

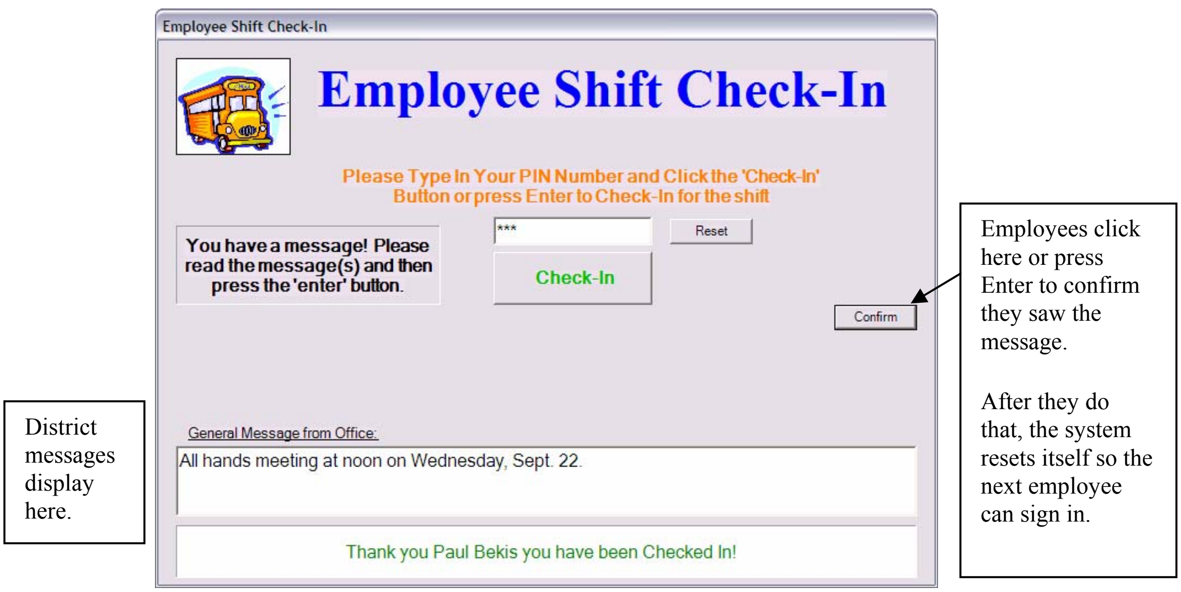

Figure 9-9. Sample district message displayed when employees check in

Specific Employee Messages

Sometimes you need to create a private message to be seen once for a specific employee. The Check-In Feature has this capability as well.

Adding a message to the system for an individual employee is different from adding a district-wide message. When you create a message for an individual employee, you need to create the shift **first** so that you can select the employee's check-in record.

Keep in mind, however, that you need to add the message to the check-in record *before* the employee checks in.

To create a message for an individual employee:

1. Create a new shift.
2. Either:
   - Select the employee's record, and click Edit (Figure 9-10).

   OR
   - Double-click the employee's record.

NOTE: You can also search for the employee's check-in record. This is described in the Searching for an Employee Record in the next section.

Figure 9-10 shows selecting Paul Bekis's check-in record:

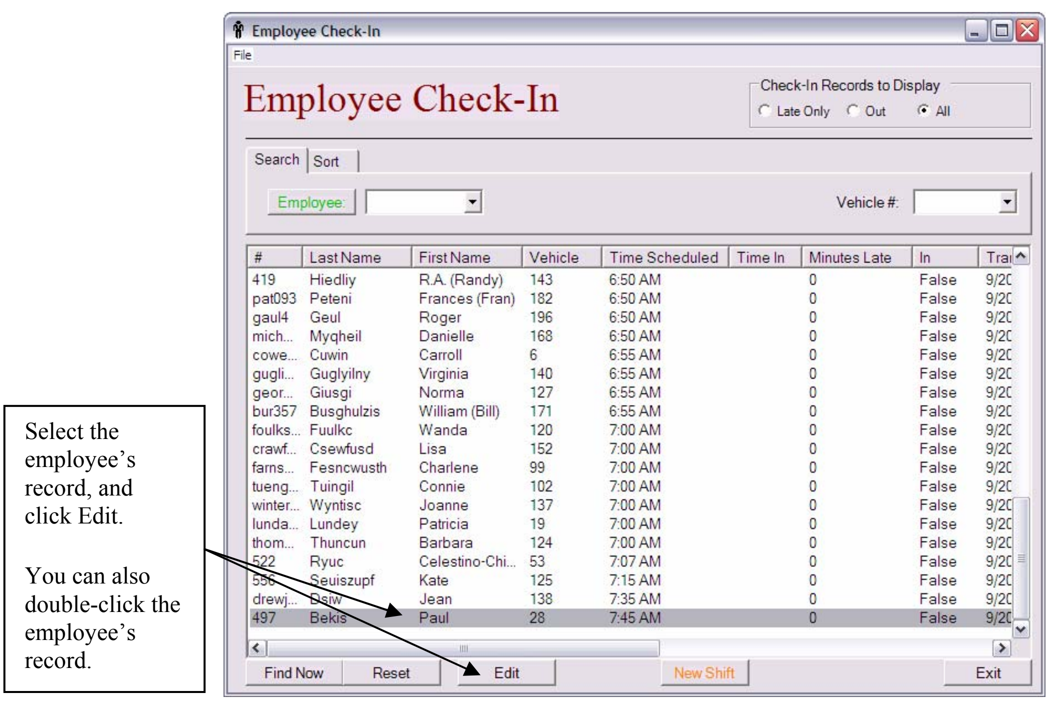

Figure 9-10. Selecting an employee check-in record

The Employee Management system displays the Administration Check-In Edit screen.

4. Type the employee's message into the Administrative Notes box.

   Figure 9-11 shows adding the employee message:

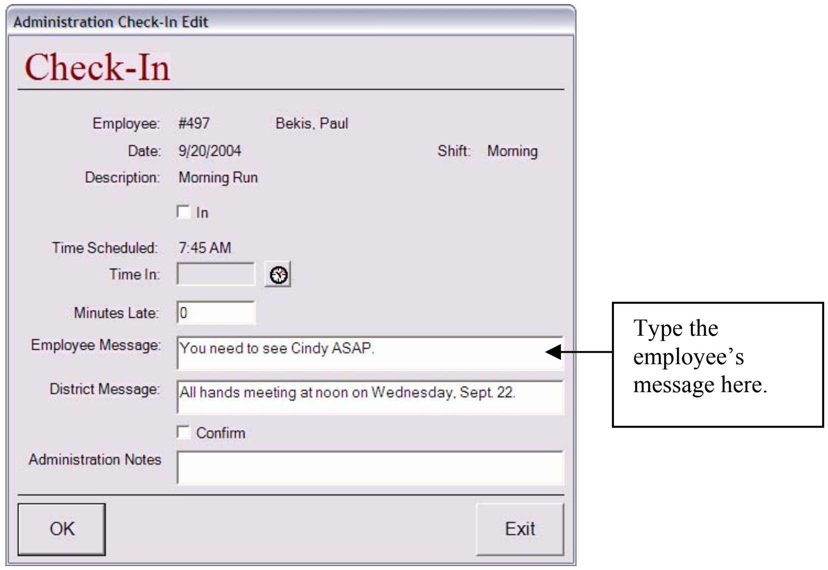

Figure 9-11. Adding an individual employee's message

5. Click OK to save the employee's message.

After the employee logs into the system, he sees his message displayed on the check-in screen (Figure 9-9):

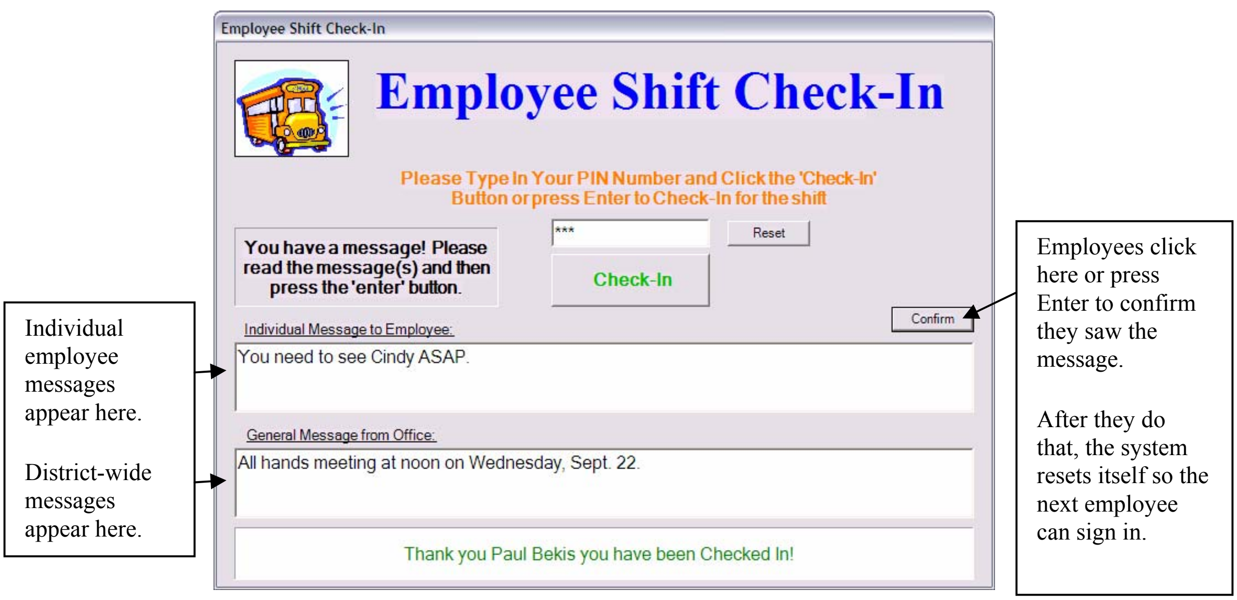

Figure 9-12. Sample individual employee message displayed when an employee checks in