Shifts and Work Patterns

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Relates to version
Tags: 8.0 Attendance Shifts Work patterns

To be able to book an activity, you must be clocked in to a shift. Work Patterns define a calendar of shifts that an individual might work. For example, **Red shift** might work 4 x 12-hour days, followed by 4 days off, followed by 4 x 12-hour nights.

Each shift in a Work Pattern is of a type that will define the pay rules, breaks and other common information for that shift. See Shift Type documentation.

Prerequisites

A shift might be 8 am to 5 pm, or 2 pm to 10 pm. A shift is set up as a Shift Type which also defines the pay rules when you're working a shift of a particular Shift Type.

You need Shift Type to be set up before creating a Work Pattern.

Once a complete cycle of shifts has been defined for a shift pattern, the pattern can be selected and repeated.

Shift Type

The Shift Type defines the default hours and pay rules for a shift. For example, a Shift Type might have the following characteristics:

- Name: Weekday early
- Start/end time: 6 am to 2 pm,
- Breaks: unpaid 30-minute break at 12 pm
- Pay: Standard rate plus x1.5 pay rate for any overtime

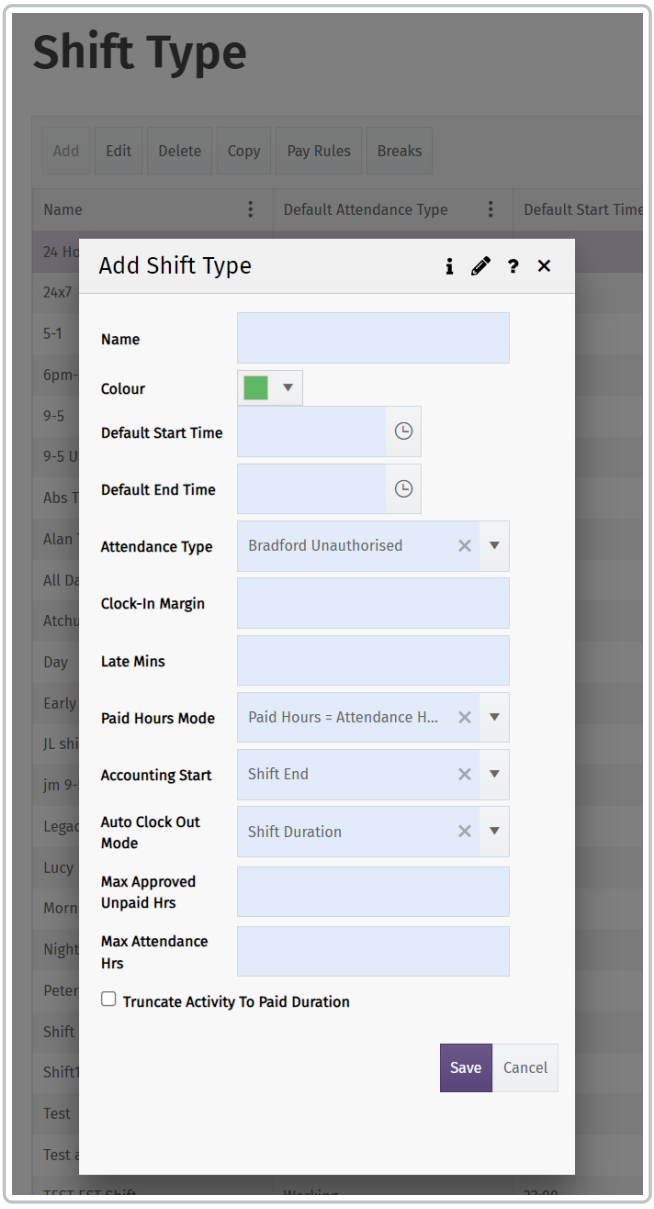
Set up a Shift Type

1. Navigate to the **Shift Type** page and click **Add** to display the **Add Shift Type** popup.

2. Complete the **Add/Edit Shift Type** input screen.

Add/Edit Shift Type input screen

The image below shows the fields and checkboxes in the Add/Edit Attendance Type popup.



The following properties can be defined for a Shift Type:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

Name*: The name to easily identify the shift.

Colour: The colour the shift will show on the work pattern calendar and timesheets.

Default Start Time*: The start time for the shift.

Default End Time*: The end time of the shift.

Attendance Type*: The type of attendance. For example, values could be: *Holiday, Sick, Working*. For more information, see the Attendance Types section below.

Clock-In Margin*: The maximum number of minutes before the shift start time that a user is allowed to clock-in to the shift.

Late Mins*: The number of minutes after shift start before a user is considered late.

Paid Hours Mode*: If you're using Eyelit to manage pay, it defines how Paid Hours are calculated. It is also used for calculating labour productivity - what proportion of Paid Hours was linked to Direct Work (i.e., booked onto jobs).

The options are:

- Paid Hours = Attendance Hours: paid for the hours worked. For example, if you worked for 8.5 hours on an 8-hour shift, you will be paid for 8.5 hours.
- Paid Hours = Shift Duration: paid for the duration of the shift. For example, if you worked for 8.5 hours on an 8-hour shift, you will be paid for 8 hours.
- Pay Rules from Clock-In: Pay rules apply from Clock-in time. See Pay Rule documentation.
- Pay Rules from Shift Start: Pay rules apply from Shift Start time.

Accounting Start*: Where a night shift runs from one day to the next, the Accounting Start determines which day your performance numbers belong to. Values: *Shift End*, *Shift Start*.

Auto Clock Out Mode*: Determines when you will be automatically clocked out if you forget to manually clock out. Values:

- *Shift Duration:* Automatically clocks you out after the duration of the shift. E.g., if you came in at 10 am on 9am to 5pm shift, it will clock you out at 6 pm.
- *Shift End: A*utomatically clocks you out at the end of the shift irrespective of the time you started.

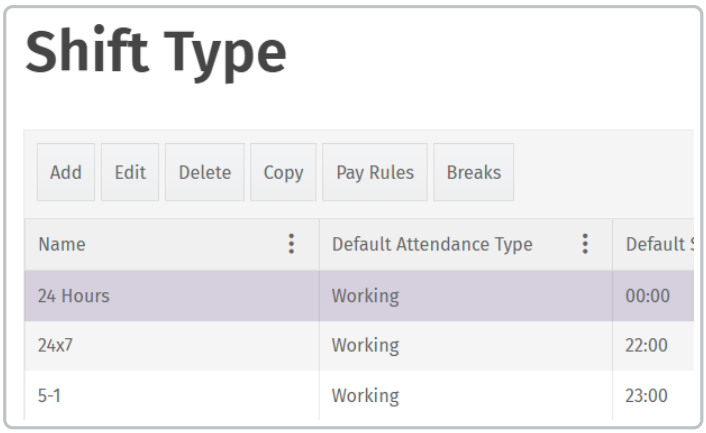
Max Approved Unpaid Hrs*: The maximum amount of unpaid overtime hours per shift you are allowed to work without supervisor approval.

Max Attendance Hrs*: The maximum number of attendance hours allowed to work per shift. Users will automatically be clocked out after their maximum attendance hours.

Truncate Activity to Paid Duration checkbox: When ticked, it will truncate time spent on work that exceeds the paid duration.

Shift type menu items

Navigate to the Shift Type page and select a shift to reveal menu items above the list of shift types.



These are:

- **Add**: Add a Shift Type.
- **Edit**: Edit a Shift Type.
- **Delete**: Delete a Shift Type. A Shift Type cannot be deleted if it's assigned to a shift.
- **Copy**: Copy a Shift Type from one to another. The Copy Shift Type input screen requires a name for the shift type.
- **Pay Rules**: Set up or apply Pay Rules to the the Shift Type. See the Pay Rules documentation.
- **Breaks**: Define the breaks that apply to Shift Type. Read more about breaks in the section below.

Breaks

Breaks are classified as **Indirect** time. This is time that is not booked to a job. Operators can either manually record when they start and finish a break or breaks can be automatically added into an operator's timesheet. Breaks can be paid or unpaid.

Add a Break to a Shift Type

1. Navigate to the **Shift Type** screen and select the Shift Type you want to add a Break to.
2. Click the **Breaks** button in the menu that appears above the list of Shift Types.
3. Complete the input screen.

Add/Edit Break input screen

The following properties can be defined for a Break:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

Name*: The name of the Break. For example, Lunch.

From*: The start time of the Break.

To*: The end time of the Break.

Activity*: Select the Activity from the drop down. This is where you specify if a break is paid or unpaid.

Auto Add checkbox: Check the box to automatically add breaks to an operator's timesheet.

Delete a Break

Select the **Break** and click the **Delete** button. Click **OK** in the popup to delete.

Attendance Types

Attendance Types define a type of attendance or absence to be recorded by a user.

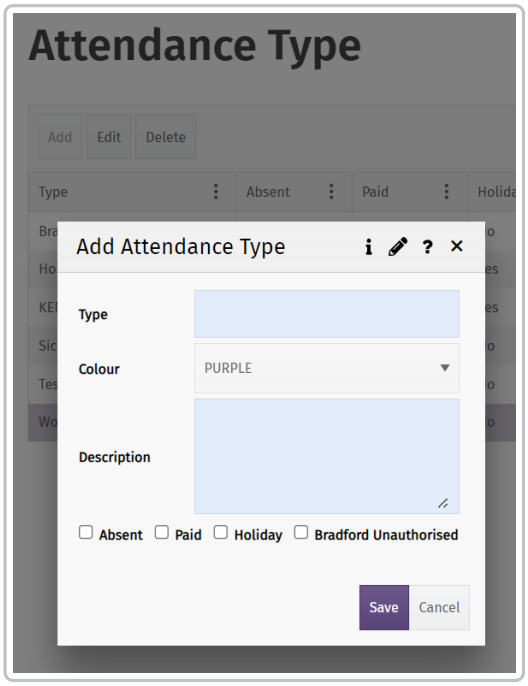
Attendance types may be:
- Paid or unpaid.
- Absent or working.

Examples of Attendance Types (this is not a comprehensive list):
- Paid vacation.
- Regular paid work.
- Customer visit.
- Unauthorised absence.

Shift Types are assigned a default Attendance Type which may be overridden on a user's timesheet.

Add/Edit Attendance Type

The image below shows the fields and checkboxes in the Add/Edit Attendance Type popup.



The following properties can be defined for an Attendance Type:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

Type*: The type of Attendance Type.

Colour: The colour displayed on the timesheet.

Description*: The description of the Attendance Type.

Absent checkbox: Check this box if the Attendance Type is **Absent**.

Paid checkbox: Check this box if the Attendance Type is **Paid**.

Holiday checkbox: Check this box if the Attendance Type is **Holiday**.

Bradford Unauthorised checkbox: Check this box if the Attendance Type is **Bradford Unauthorised**. The Bradford Factor is a gauge of concern related to employee absenteeism. For more information, see Bradford Factor.

Delete an Attendance Type

Navigate to the **Attendance Type** page, select the one you want to delete, and click the **Delete** button in the menu items that appear. Click **OK** in the dialogue box to delete.

An Attendance Type may be deleted if there are no attendance records associated with it.

Create a Work Pattern

1. Navigate to the **Work Pattern** page and click **New**.
2. Complete the **New Work Pattern** input screen.

The following properties can be defined for a Work Pattern:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

Name*: The name of the Work Pattern.

Description: The description of the Work Pattern

Enabled*: Is the Work Pattern enabled? Values:

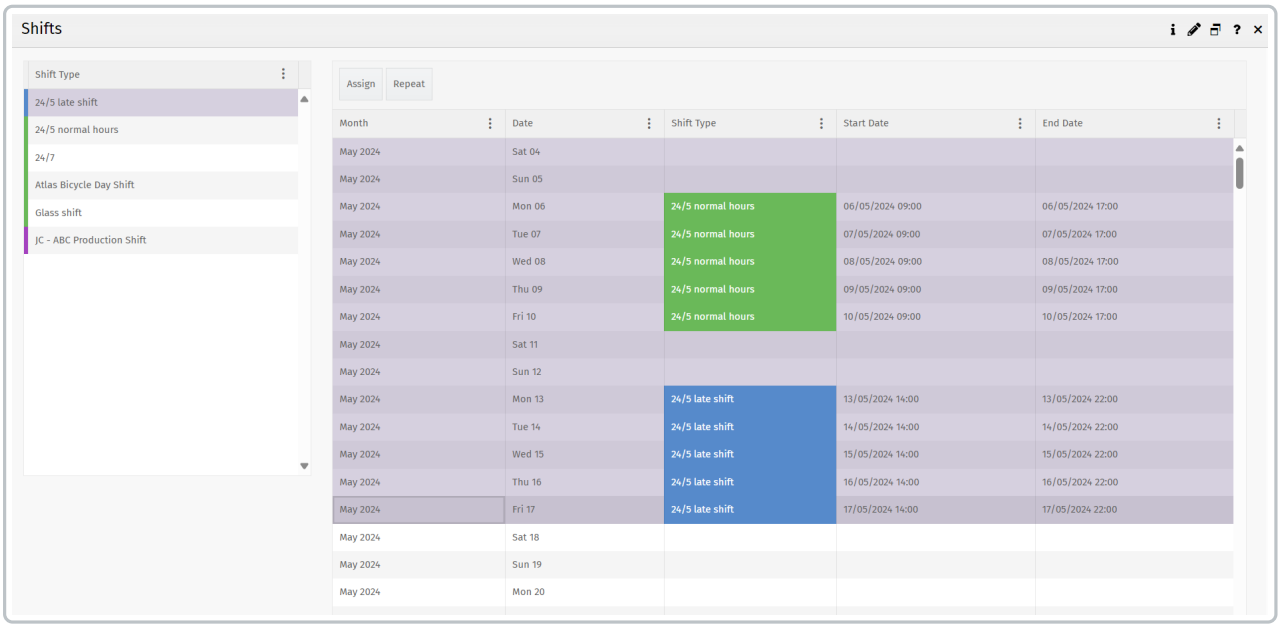
- **Yes**: The Work Pattern is available to be used.
- **Disabled**: The work pattern is obsolete.

Add Shifts to a Work Pattern

Work Patterns define a calendar of shifts that an individual might work. A shift is set up as a Shift Type which also defines the pay rules when you're working a shift of a particular Shift Type.

1. Navigate to the **Work Pattern** page, select the Work Pattern and click the **Shifts** button that appears.

2. In the **Shifts** screen, you can select a Shift Type and click the **Assign** button to add it to the calendar.



In the image above, the Work Pattern has two Shift Types assigned to it (green and blue shifts).

You can perform the following actions on this screen:

- Assign a **Shift Type** to several rows (days) by using control or shift key.
- Highlight blocks of rows, as in the image above, to reveal the **Repeat** menu item. A popup lets you specify how many times you want the selected rows to be repeated. Always include non-working days (typically weekends) to make sure the shifts are copied correctly.
- By clicking a row, menu buttons appear that lets you **Clear Selected** or **Clear Onwards**. This removes the Shift Types so be careful when using these functions as you cannot reverse the action.

User Assignment

Users must be assigned to the Work Patterns that they are permitted to work. One work pattern will be marked as the user's default.

Assign a user to a Work Pattern

A user can be assigned to a Work Pattern in one of the following ways:

1. Work Pattern menu item

a. Navigate to the **Work Pattern** page, select the Work Pattern that the user will be assigned to and click the **Users** button that appears in the menu above the list.

b. Select the user and click the **Assigned** button that appears above the list.
The users assigned to a Work Pattern will appear at the top of the list with the row highlighted in yellow.

c. If you want to set the selected Work Pattern as the default for the user, select the user and click the **Set Default** button that appears in the menu above. When doing this, any Work Pattern that was previously set to default for the user will automatically be reset to **No**.

d. Repeat steps **a** to **c** for each Work Pattern you want to assign to the user.

2. Users menu item

a. Navigate to the **Users** page, select the user and click the **Work Patterns** button that appears in the menu above the list of users.
Work Patterns that are already assigned to the user will appear in yellow.

b. Select a Work Pattern and click the **Assign** button that appears.

c. You can set any assigned Work Pattern as the user's default by selecting it and clicking the **Set Default** button that appears. When doing this, any Work Pattern that was previously set to default for the user will automatically be reset to **No**.

d. Repeat steps **a** to **c** for each Work Pattern you want to assign to the user.