

The Daily Shifts are the building blocks of Payroll Shifts and are built up using the Shift Categories. Basically you need to define a daily shift for each different shift time that employees can work.

For example, in a typical 5 day week, an employee could work using 2 different daily shift patterns. The one is a daily shift for Monday to Friday, and the other is a day shift for Saturday and Sunday. More complicated shifts could contain more shift types, for example Friday may be different from Monday to Thursday (they go home earlier on Fridays) and then they work a half day on Saturday, and do not work on Sunday. This would mean that you would need to define 4 different day shifts.

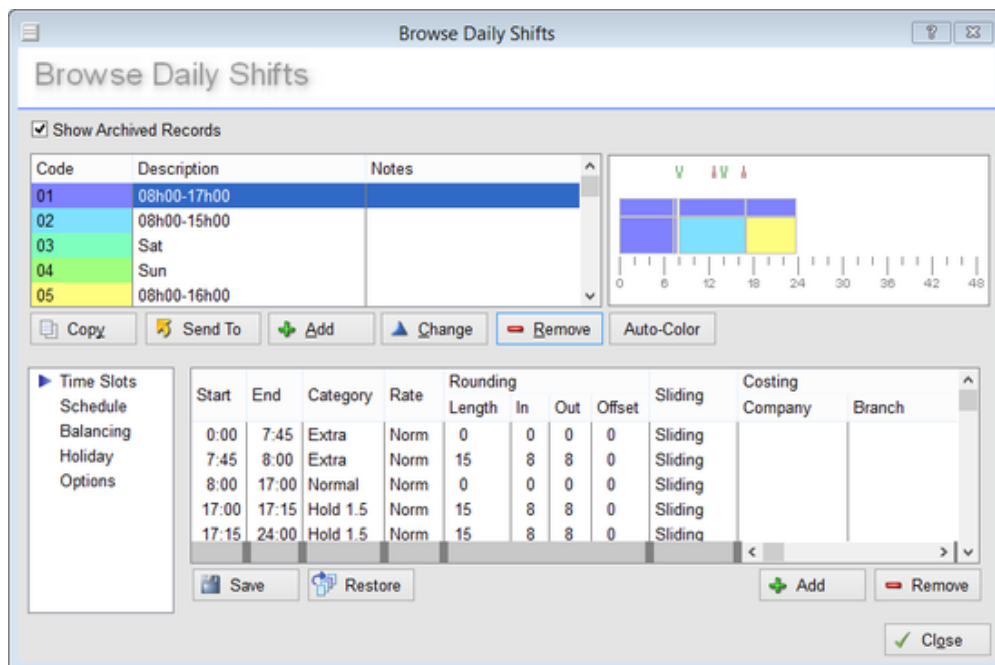
Of course when you have employees working day and night, you may need to define multiple different shifts.

Each shift can contain different options, but not all these option need to be used in every shift. Only use those options that meet your requirements.

Note: When working with Daily Shifts, you are only concerned with “Days” and how these days are made up using the different Time Categories and Rates. How the days are put together to make up Weeks are detailed under Payroll Shifts.

Browse Daily Shifts Window Explained

Select the **Daily Shifts** option from the **Setup / Shifts** dropdown menu or select the toolbar **Edit Daily Shift Setup** button. The *Browse Daily Shifts* window will be displayed.



The *Browse Daily Shifts* window provides the following:

- Daily Shifts List.** This is a list (top left side of window) of all available Daily Shifts and provides the Daily Shift Code, Description and Notes.
- Daily Shift Edit Buttons.** These buttons (middle left side of window) are used to Copy, Send To, Add, Change or Remove a Daily Shift in the list.

- c. **Shift Graphical Representation.** The top right graphic represents the general compilation of the selected Daily Shift in the list.
- d. **Shift Settings options.** These options are used to set the different options for each of the selected Daily Shifts listed.

Note: Each of the options available from the *Browse Daily Shift* window will be described on more detail when explaining how to create a new Daily Shift.

Daily Shifts List

The Daily Shifts list is situated on the left side of the window and is used to list all available Daily Shifts and provide the Code, Description and Notes for each.

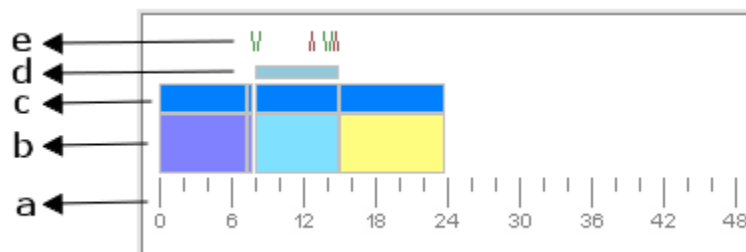
Code	Description	Notes
01	08h00-17h00	
02	08h00-15h00	
03	Sat	
04	Sun	
05	08h00-16h00	
06	Day Shift 07:30 - 16:30	1 hours unpaid lunch break, 2x 15min paid tea breaks.
07	08h00-14h00	

The following action buttons are also available:

- a. **Copy.** This button enables you to copy an existing Daily Shift.
- b. **Send To.** This button will enable the list of Daily Shifts to be printed on a printer, saved as a file or to be emailed to an email recipient.
- c. **Add button.** This button is used to add a new Daily Shift to the list.
- d. **Change.** This button is used to change an existing Daily Shift that is selected in the list.
- e. **Remove.** This button is used to remove a selected Daily Shift.

Graphical Representation of Daily Shift

The graphical representation of the selected Daily Shift (displayed on the top right side of the window) provides the following information:

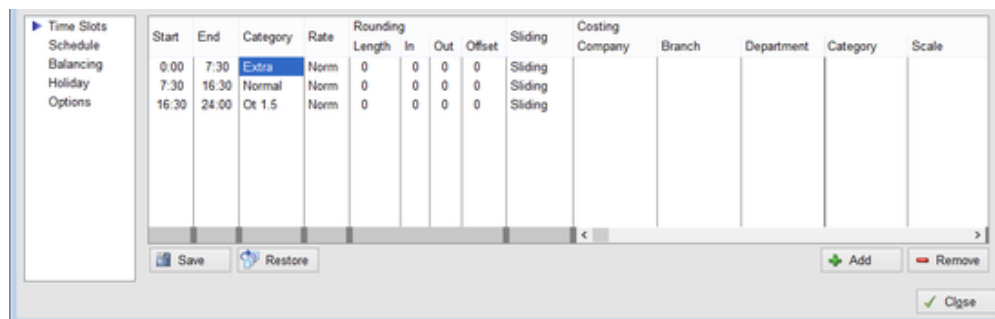


- a. **Time Line.** The Time Line is marked off in hours from 0 to 24 and onwards for a period of up to 48 hours. Most Shift Days are only 24 hours long but you do not have to be restricted to 24 hours and can create day shifts that are shorter than 24 hours or a longer shift of up to 48 hours.

- b. **Shift Time Categories.** These are the particular shift categories that make up the daily shift and are defined from the Time Slots settings option.
- c. **Shift Time Rates.** These are the particular shift rates allocated to the shift time category and are defined from the Time Slots settings option.
- d. **Selected Shift Time Category.** This line identifies which shift time category has been selected.
- e. **Schedule Arrows.** If scheduling is used, these arrows show the clocking time and direction that is expected.

Daily Shift Settings Options

This window is used to define the required settings for the particular Daily Shift.

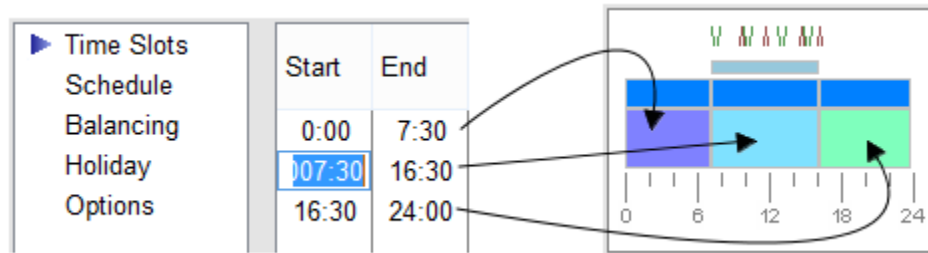


The following options are available:

- a. **Time Slots.** This option is used to define the time categories that make up the daily shift, the time categories and rates that are to be used. Also if Rounding is used, the times and directions can be defined. Also if Job Costing can be allocated, this option enables you to allocate a job category to the time slot.
- b. **Schedule.** This option contains the employee's time related information with respect to the particular Daily Shift selected. These include the time he's expected at work, what time he's expected to leave, when the daily breaks are, etc.
- c. **Balancing.** Balancing is used to move time from one category to another after the day is processed. By doing this you can limit the number of hours in a category by sending the balance to another category. You can also set that certain minimum amounts are met before other categories can be earned.
- d. **Holidays.** This option enables you to define how an employee's hours are to be processed if the Daily Shift falls on a public holiday or when they go on paid leave or work over a public holiday.
- e. **Options.** This window enables you to define advanced options for the selected Daily Shift and includes expected working hours, the routing of bonus hours worked, handling of short breaks, etc.

Time Slot Period

The **Start** and **End** times are used to define the actual starting and ending times for the selected timeslot in the list. This is set by selecting the required timeslot (will be displayed in the graphical representation with a bar above it as per the example above showing the 07:30 to 16:30 slot which has been selected, and typing in the required times.

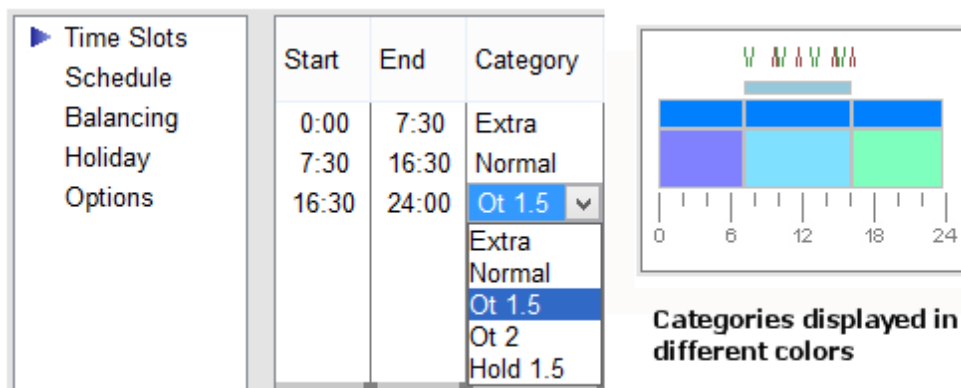


In the above example 3 different time slots have been identified and are as follows:

- i. **00:00 to 07:30** – this is from midnight to the normal starting time of the daily shift. Normally no employee is working during this period but on occasions an employee can come in earlier and this time is then classified as extra time.
- ii. **07:30 to 16:30** – this is the normal starting and ending times of the daily shift and all employees should clock in at this time. This is classified as normal working time.
- iii. **16:30 to 24:00** – this is from the end of the normal daily shift end time till midnight. Normally no employee is working during this period but on occasions an employee can work late and this time is then also classified as extra time.

Category

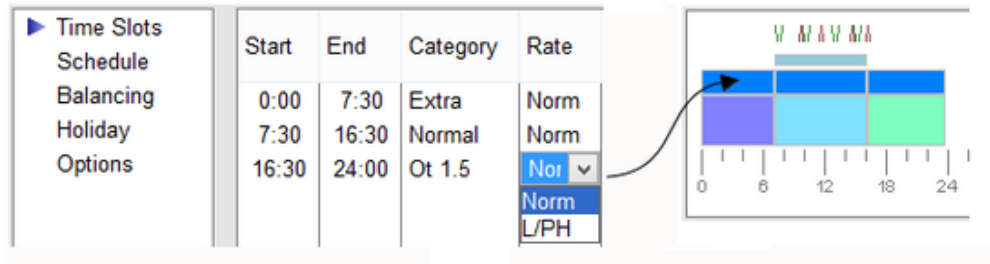
This is the Shift Time Category that is allocated to the specific time slot. To select the shift time category that is to be allocated to a time slot, double-click on the time slot's **Category** cell and use the dropdown menu to select the required category.



This will also be reflected in the graphical representation of the daily shift by the different colors that have been selected to represent each category (Setup / Shifts / Shift Time Categories) as shown in the example above.

Rate

This is the Shift Time Rate that is allocated to the particular time slot. To select the shift time rate which is allocated to a time slot, double-click on the time slot's **Rate** cell and use the dropdown menu and select the required rate.



This will also be reflected in the graphical representation of the daily shift by the different colors that have been selected to represent each rate (Setup / Shifts / Shift Time Rates) as shown in the example above.

Rounding

During a daily time slot, the employee clockings can be rounded. This means that employee clockings will be moved, for processing purposes only, to the nearest “rounded” number.

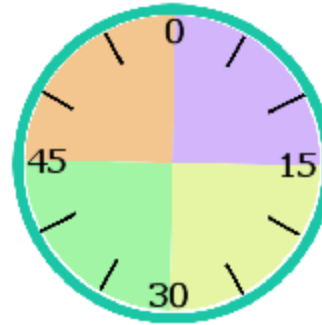
Rounding			
Length	In	Out	Offset
0	0	0	0
0	0	0	0
0	0	0	0

The settings that are used with rounding are:

- Length:** You can set the period of rounding, as well as the break point. For example, if your *Rounding Period Length* is set to 15 minutes then all the clockings will be processed as if they occurred on a 15 minute boundary (on the hour, on the quarter-past the hour, on the half hour or on the quarter-to the hour).

A Rounding length of 15min

- * Top of the hour
- * A Quarter Past
- *Half Past
- *A Quarter To



- b. **In and Out Rounding Breaks:** If the *Rounding Break* is set to 10 minutes, then all clockings between 5 minutes before the hour and 10 minutes after the hour will be set to that hour.

I.e. with a *Length* of 15 minutes and a *Rounding Break* of 10 minutes, a time of 7:50 will be set to be 7:45; a time of 9:12 will be set to 9:15 for example.

Rounding Length 15min



Rounding Break
of 10min (In)



Rounding Break
of 5min (Out)

The Rounding Break can be set for both **In** and **Out** clockings.

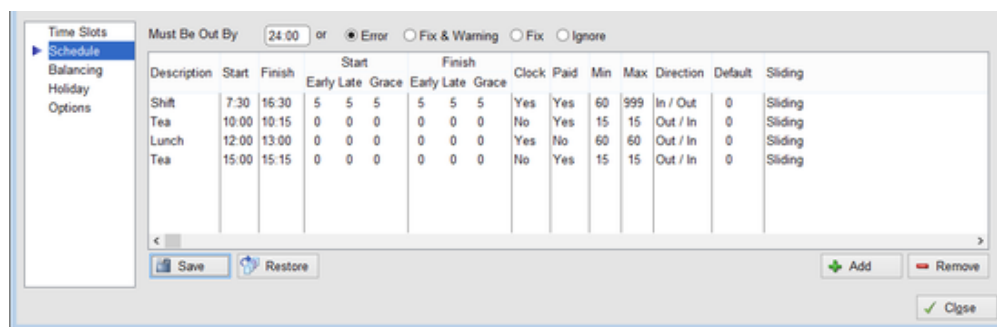
- c. **Offset:** If the *Rounding* is set to 15 minutes, then all clockings are set to the nearest quarter hour. Using the offset setting, the actual rounding time is shifted by the time entered.

Costing

If job costing is used and the Assign Costing to Slots option has been selected (*Setup / Features / Job Features*), you can associate the different Daily Shift slots with particular Job Categories.

Schedule Settings

When the Schedule setting option is selected, the below window will be displayed and provides the following information:



This option contains the employee's time related information with respect to the particular Daily Shift selected. These include the time he's expected at work, what time he's expected to leave, when the daily breaks are, etc.

The **Add** button is used to add a new schedule to the list and the **Remove** button is used to remove a selected schedule from the list.

You can have any number of schedules on a day. Some employees may have more than one expected working period in the day. For example restaurant workers arrive in the morning to clean up and then come back again in the evening to serve and cook etc.

The **Must Be Out By** time is used to set the absolute end of the day for the employee and is the time by when the employee must have clocked out. This means that if the employee has not clocked out by this time one of the following actions will take place:

- Error:** An error will be generated which requires the system user to manually correct the clockings for the day before they can be processed.
- Fix and Warning:** The option will automatically insert an **out** clocking at the employee's last expected out time. A warning will also be generated when the day is processed.
- Fix:** This is the same as the above, but no warning will be generated.
- Ignore:** The system will take no action. In this case employees are allowed to work straight through from one day into the next.

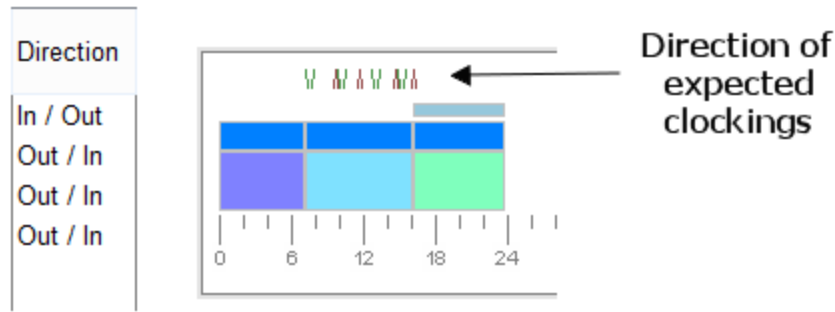
The following employee daily shift Schedule information is available from the list:

- Description:** This is the name of the schedule. For example Working Day, or Lunch or Tea Break, etc.
- Start:** This is the expected start time of the schedule.
 - Early:** This is the period, in minutes, that the employee is allowed to clock in, before the expected time, without creating a warning. If the employee clocks in earlier than this period, a warning will be generated for the employee when the daily hours are processed.
 - Late:** This is the period, in minutes, that the employee is allowed to clock in after the expected time, without creating a warning for entering late. If the employee clocks in after this period has elapsed, a late warning will be generated when the daily hour are processed.
 - Grace:** Grace is the period, after the expected time when, for processing purposes, the error in the clocking time will be ignored. For example if the Grace is set to 5 minutes and the

expected clocking time is 8:00 am and the employee clocks in at 8:04, the system will pay him as if he arrived at 8:00.

- c. **Finish:** This is the expected end time of the schedule.
 - i. **Early:** This is the period, in minutes, that the employee is allowed to clock out, before the expected time, without creating a warning. If the employee clocks out earlier than this period, a warning will be generated for the employee when the daily hours are processed.
 - ii. **Late:** This is the period, in minutes, that the employee is allowed to clock out after the expected time, without creating a warning for leaving late. If the employee clocks out after this period has elapsed then a late warning will be generated when the daily hour are processed.
 - iii. **Grace:** Grace is the period, after the expected time when, for processing purposes, the error in the clocking time will be ignored. For example if the Grace is set to 5 minutes and the expected clocking time is 17:00 pm and the employee clocks out at 16:56, the system will pay him as if he left at 17:00 pm.
- d. **Clock:** Set this to *Yes* if the employee is expected to clock or set to *No* if the employee is not expected to clock. If this is set to *Yes* and the employee fails to clock, a warning will be generated. If this is set to *No* and the break is an *Unpaid* break, the break time will be deducted from the employee's attendance time. The *Yes/No* option can be changed by double-clicking on the cell.
- e. **Paid:** Set this to *Yes* if the break is paid and *No* if the break is unpaid. If the schedule is for a working period (not a break) then this should be set to *Yes*. The *Yes/No* option can be changed by double-clicking on the cell.
- f. **Min:** This is the minimum amount of minutes to be taken for the specific schedule. If the employee breaks for less time than this, the minimum time will be deducted from the day. If this schedule is not a break, but a working time, and the employee works at least this minimum number of minutes, the time worked will qualify as a full "shift". This is used for payroll systems that count completed shifts for bonus calculations etc.
- g. **Max.** This is the maximum hours that an employee on this shift is supposed to work. This will normally only be used where working limits are enforced and the employee is not allowed to work more than a defined amount of hours. If worked over these hours, a warning will be created.
- h. **Direction:** Set this to *In/Out* for a working period, and *Out/In* for a break. For example the working day starts at 8:00 am and ends at 16:00 pm, the employee clocks IN at 8:00 and clocks OUT at 16:00 so this schedule would be set to *In/Out*. Lunch starts at 12:00 (the employee goes Out) and ends at 12:45 (the employee comes back in) so this would be an example of an *Out/In* direction. The *In/Out* option can be changed by double-clicking on the cell.
- i. **Default.** This is the Default value that is to be taken off an employee's daily hours if they do not take the required breaks. For example, if an employee is supposed to clock for a break that is unpaid and he does not take it, this is the amount of time (in minutes) that must be taken off his total daily hours.

Above the daily shift schedules, a graphical representation is displayed with small arrows above that indicate the employee's scheduled clocking times and directions (a down arrow for In clocking and an up arrow for an Out clocking).



Employee Schedule Rules

The following schedule rules, in order of application, are applied when the Employee Schedules are processed for payroll purposes.

- i. Grace is applied to all clockings. If the person clocks inside the grace period then the clocking is moved to the perfect time (time defined in schedule).
- ii. If the person clocks out for the day, before the early time then the break is not paid.
- iii. If the person clocks out for the day during the early period, then the break is paid as a bonus.
- iv. If the person clocks out for the day during the break, then the Min break time is paid.
- v. If the person clocks in for work after the end of the break window then time is unpaid.
- vi. If the person clocks in for work during the break, then the break is ignored.
- vii. If the person is out before the Early start of the break, then the break is ignored.
- viii. If the person is in during the whole break then a warning (6) is generated.
- ix. If the person goes out after the Late start then a warning (14) is generated.
- x. If the person clocks within the early period then an In, and Out, clocking is added from the normal start time.
- xi. If the person clocks back in after the Max break time then the extra time is docked.
- xii. The break window can exceed the maximum break length.

Balancing Settings

When the Balancing setting option is selected, the below window will be displayed and provides the following daily shift balancing options:

Category	Rate	Min	Get From	Max	Send to category
Normal	Norm	8:00	Ot 1.5	8:00	Ot 1.5

Balancing is used to move time from one category to another after the day is processed. By doing this you can limit the number of hours in a category by sending the balance to another category. You can also set

that certain minimum amounts are met before other categories can be earned.

For example, you can set the Maximum Normal time for a day to 8 hours after which any excess time is sent to Overtime 1. Any number of these balancing rules can be added for any particular daily shift.

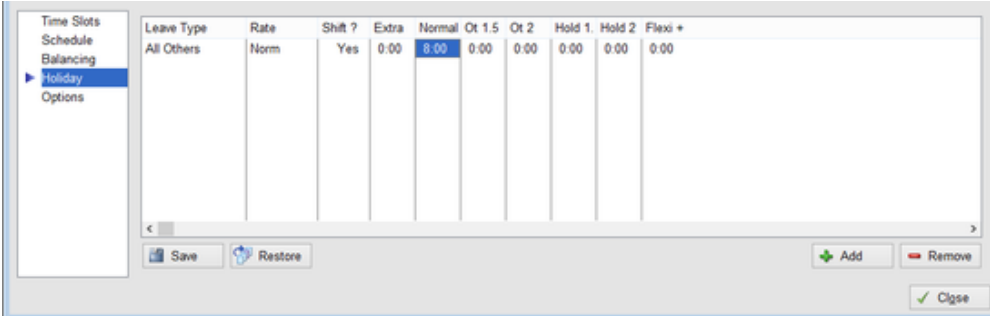
- The **Add** button is used to add a new balancing rule to the list and the **Remove** button is used to remove a selected balancing rule from the list.
- The **Up** and **Down** arrow buttons are used to set the order of the balancing rules as they are processed, from the top of the list down.

Each line enables you define both possible rules at the same time. Taking the first line of the above window as an example, if the employee hasn't worked 8 hours of normal time, then time is taken from OT1.5 to make up the difference. If he has worked more than 8 hours of normal time then the excess is sent to OT1.5.

Note: Time cannot be balanced across different rates. Thus time cannot be taken from Rate B to supply time required for Rate A. In this way you can protect time from certain parts of the day from being balanced against time in other parts of the day.

Holiday Settings

This option enables you to define how an employee's hours are to be processed if the Daily Shift falls on a public holiday or when they go on leave. When the Holiday setting option is selected, the below window will be displayed and provides the following daily shift holiday options:



Leave Type	Rate	Shift ?	Extra	Normal	Ot 1.5	Ot 2	Hold 1	Hold 2	Flexi +
All Others	Norm	Yes	0.00	8.00	0.00	0.00	0.00	0.00	0.00

The list displays how the Day Shift is to be processed if it falls on a Public Holiday or an employee takes leave. In the above example, 8 normal hours are allocated to the employee if this Daily Shift falls on a public holiday or when the employee is on leave.

- Leave Type:** This column is used to select the type of leave which is to be included in the daily shift schedule for processing. The type of leave is selected by double-clicking on the cell and selecting the leave type from the dropdown list.
- Rate:** The rate option is used to define the rate that will be used to calculate the leave type and is selected by double-clicking on the cell and selecting the required rate from the dropdown list.

- c. **Shift:** If these hours are to be seen as a completed shift (as there will be no employee clockings for this shift and these allocated hours could be less than the expected hours to be worked) then the Shift option must be toggled to “Yes” by double-clicking on the cell.
- d. **Categories:** The category options are used to define the category (department, etc.) against which the paid leave is to be costed. Please note that Job costing module needs to be enabled to use this.
- e. **Hours:** The Time Categories are used to define the amount of hours that are to be allocated and to which category, when the employee is on paid leave or it is a public holiday.

The **Add** button is used to add a new holiday rule to the list and the **Remove** button is used to remove a selected holiday rule from the list.

Note: If the Holiday option fields are left blank then the Employee Information Leave settings are used to calculate holiday times.

Options Settings

This window enables you to define advanced options for the selected Daily Shift and includes expected working hours, the routing of bonus hours worked, handling of short breaks, etc.

The screenshot shows the 'Options Settings' window. On the left is a sidebar with a tree view containing 'Time Slots', 'Schedule', 'Balancing', 'Holiday', and 'Options' (which is selected and highlighted in blue). The main content area contains the following fields and controls:

- Bonus Time:** A section with the text 'If 0:00 completed, then add 0:00 to [dropdown] Rate Norm [dropdown]'. The dropdowns appear to be for 'To' and 'Rate'.
- Macro Script:** A text box containing 'DailyMacro' and a help icon (?) to its right.
- Std Hours:** A text box containing '8:00'.
- Shortbreak:** A text box containing '00:00'.
- Pay on Day Out:** A checkbox that is currently unchecked, with the text '(This only applies if the Payroll Shift is set to use it)' to its right.

At the bottom of the window are three buttons: 'Save', 'Restore', and 'Close' (with a checkmark icon).

The options section, allows you to set advanced options for the selected Daily Shift and include:

- a. **Bonus Time.** This option is used to assign hours to a separate shift category if more than a pre-defined amount of hours are worked. This can be used for bonus hours etc. The fields are:
 - i. **Hours Completed.** If more than the specified amount of hours are worked on this shift, the employee is entitled to the bonus allocation.
 - ii. **Hours to Add.** This is the number of hours that are to be added to the selected category.
 - iii. **To.** This is the Shift Category to which the bonus hours are to be added.
 - iv. **Rate.** If rates have been defined, this is the rate to be used.
- b. **Macro Script.** Use this to assign a macro script that will be used when processing the daily shift (macro scripts are discussed on more detail under the [Macro Scripts](#) section).
- c. **Standard Hours.** This field allows you to set an arbitrary amount of ‘Standard Hours’ for the day. This figure is not used in the processing, but is added together when doing the payroll processing. This determines the ‘Standard Hours’ for the payroll period and can be useful when creating reports.
- d. **Shortbreak.** This is used to set a break time (Out then In clocking) that will not affect the employee’s daily hours. Therefore, if an employee clocks out and then back in within this period,

the clockings will not affect his total daily hours. This is normally used for clocked toilet breaks, smoke breaks, etc.

- e. **Pay on Day Out.** This option is normally used for shifts where the shift starts on one day and finishes on the following day. Normally the system allocates the total shift hours to the day the employee clocks in, but this option (when selected) will enable all the hours worked to be used for the day when the shift ends and is only used when processing payroll shifts.

Permalink: <http://tinyurl.com/nl4ye6l>