

VERSION 1.0
DECEMBER 10, 2019

Apps for Greentree

JOB COST SHIFT MANAGEMENT

APP NUMBER: 010007

Powered by:

MYOB Greentree

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FEATURES

1. Shift management integrated with job costing

- Management of the shifts starts with scheduling number and types of employees required for a job potentially months before the actual job is required to be done. Closer to the date a list of employees that fit the criteria (and are available) can be created and these employees contacted to confirm their availability.
- During the job, timesheet entry can be entered in bulk, as the default shift-employee allocation is already populated. This bulk timesheet entry still needs to be flexible as employee allocation is reasonably fluid and can change daily as the work demands.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

Greentree Modules: Job Cost, HR (optional), CRM Basics

Associated Apps: None

USER INSTRUCTIONS

SHIFT MANAGEMENT

| Data Entry | Job Cost | Shift Maintenance

This is a new form allowing the user to maintain shifts in the Greentree system. The shift maintenance form has two tabs, one for recording the main data of the shift with required employee information and a second for creating and maintaining a list of employees that are assigned to work on the shifts with a sub-tab for criteria entry and another sub-tab for displaying the list of matching employees.

Job Number	Employee Type	Description	Required	On List	Confirmed
4000	ASSTECH	Assembly Technician	3	1	1
4000	SERTECH	Service Technician	2	0	0
4000	ASSMAN	Assembly Manager	1	0	0
4000	SERVMAN	Service Manager	1	0	0

Code Enter a code to indicate the job and shift being setup

Name Enter the name of the job and shift being created

Status Select the status for the shift.

MAIN TAB

The first tab on the screen will provide space for the entry of the high-level information of the shift being managed

The fields provided on this screen are:

Main Job Code A default job is selected for the shift entry. This will display the start date for the job along with the Area tree value that was selected for the job.

Shift information – the duration of the job, number of shifts a day and the normal/overtime hours per shift.

Start Date Defaults to today or from the Start date on the additional tab of the job

End Date Enter when the job is expected to finish

Duration Will display based on above dates

Shifts Per Day Enter how many shifts will be worked in a day

Normal Enter the number of ordinary hours per shift

Overtime Enter the number of overtime hours expected in a shift

The main tab also has a table to collect specific employee requirements for a shift. You need a row for each combination of job\sub-job and employee type.

Column	Available	Details
Job Number	This defaults to the parent job on the shift header record	A drop-down list gives the option to select the parent job or a sub-job of the parent job
Employee Type	A drop-down list of the JC employee types available for the company ordered by code	Select each type of employee that will work on the job on separate rows
Employee Description	Displays the description of the employee type selected	
Required	The number of the selected employee type required for the job	Refer to Build List tab
On List	The current number of employees of the selected type that have been populated in the list	Refer to Build List tab
Confirmed	The number of employees in the list that have a status of Confirmed	Refer to Build List tab

You must save the shift and recall it to build the list of employees.

BUILD LIST TAB

The first sub-tab of build list will be the criteria to populate the list.

The screenshot shows the 'Shift Maintenance' application window. At the top, there's a purple header with the 'GT' logo and window controls. Below the header is a toolbar with various icons. The main area is divided into two tabs: 'Main' and 'Build List'. The 'Build List' tab is active and further divided into 'Criteria' and 'List' sub-tabs. The 'Criteria' sub-tab contains several input fields: 'Job Code' (text), 'Shift No' (dropdown with '1'), 'Employee Type' (text), 'Employee Status' (dropdown), 'HR Certification' (text), 'Employee Trees' (dropdown), 'Previous Experience' (text), 'Area Restrictions' (text), 'Include People From' (text), and 'Exclude People From' (text). There are also three 'Select' buttons with tree icons, corresponding to 'Certification Status', 'Previous Experience', and 'Area Restrictions'. A 'Build List' button is located at the bottom center. The status bar at the very bottom shows 'Ready' on the left and 'There is one Shift' on the right.

Job Number

Multi-Select – this allows you to build shift lists for different sub jobs one at a time from those specified on the main tab. Select the sub-jobs you want to include – when building the list, the query will restrict to those employees matching the employee types for the selected jobs on the main table.

Shift Number

Select the shift you want to build the list for – you can only build for one shift at a time

Employee Type

Multi-Select. Select the employee types from the Main table that you want to build the list for

Employee Status

A drop down list of the available HR employee statuses – this lets you include seasonal or casual employees who may not currently be Active.

Certification

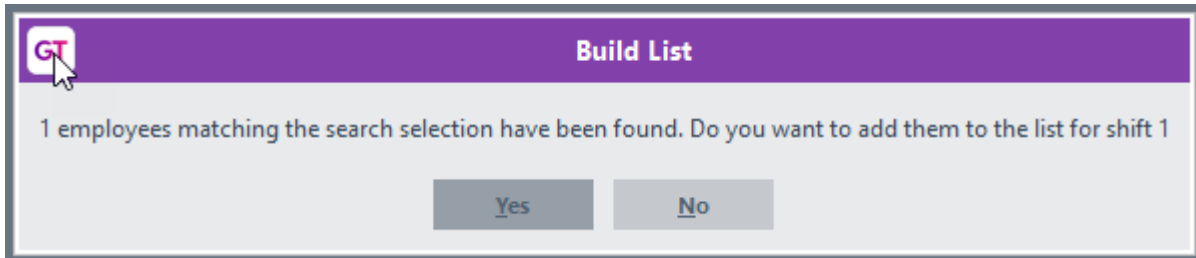
Single-Select. A drop-down list of the available HR certification types – select the certificates that employees must have to work on the selected jobs and shifts

Certification status

Single-Select. A drop-down list of None (blank), Current and Expired. Relates to the selected certificates – by including Expired you can select people who may previously have been certified but whose certificate may have expired.

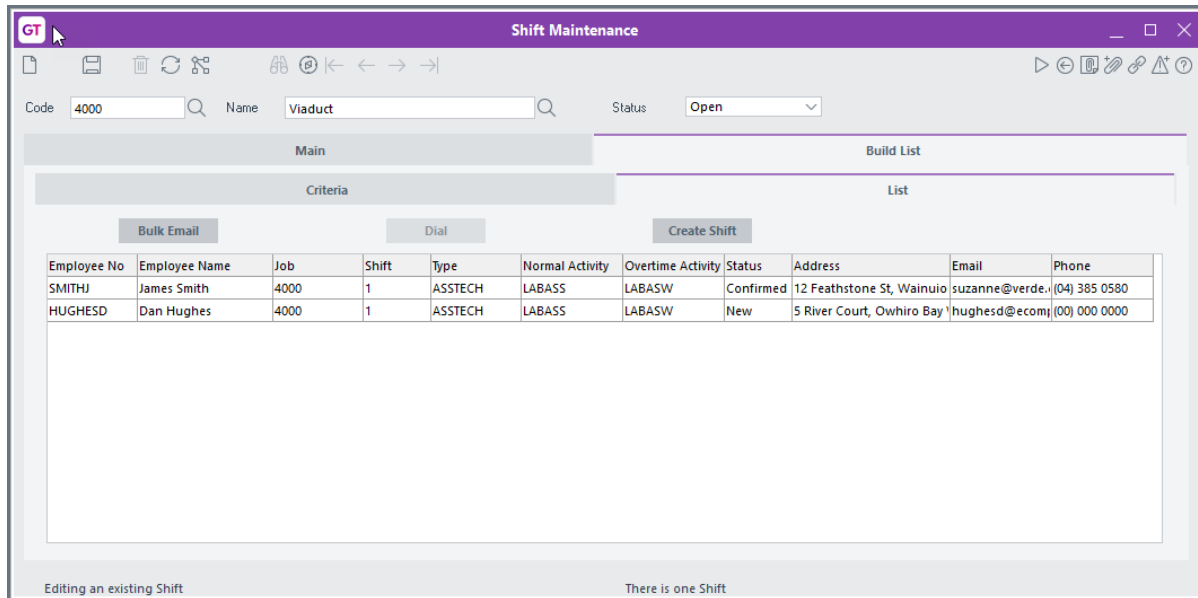
Employee Tree	3 tree selection fields to allow filtering of employees using tree assignments.
Previous Experience	Multiple branch selection from the Area tree selected in the shift management setup. This will restrict the employee selection to those who have worked on a job that was in the selected area.
Area Restrictions	Multiple branch selection from the Area tree. This will filter the employee selection to those employees who have not been banned from the selected area.
Include People From	Single-Select. A drop-down list of the shifts in Greentree. The employee selection will be limited to those employees CONFIRMED in the selected shift's list.
Exclude People From	Single-Select. A drop-down list of the shifts in Greentree. The employee selection will be limited to all employees other than those CONFIRMED in the selected shift's list.

A Build List button will invoke the selection process. Employees matching the selection criteria and not currently in the list for the shift will be retrieved from Greentree.



A prompt will be shown “X employees matching the selection have been found. Do you want to add them to the list for shift XYZ”. Answering Yes will switch the display to show the list tab with the employees populated in the table.

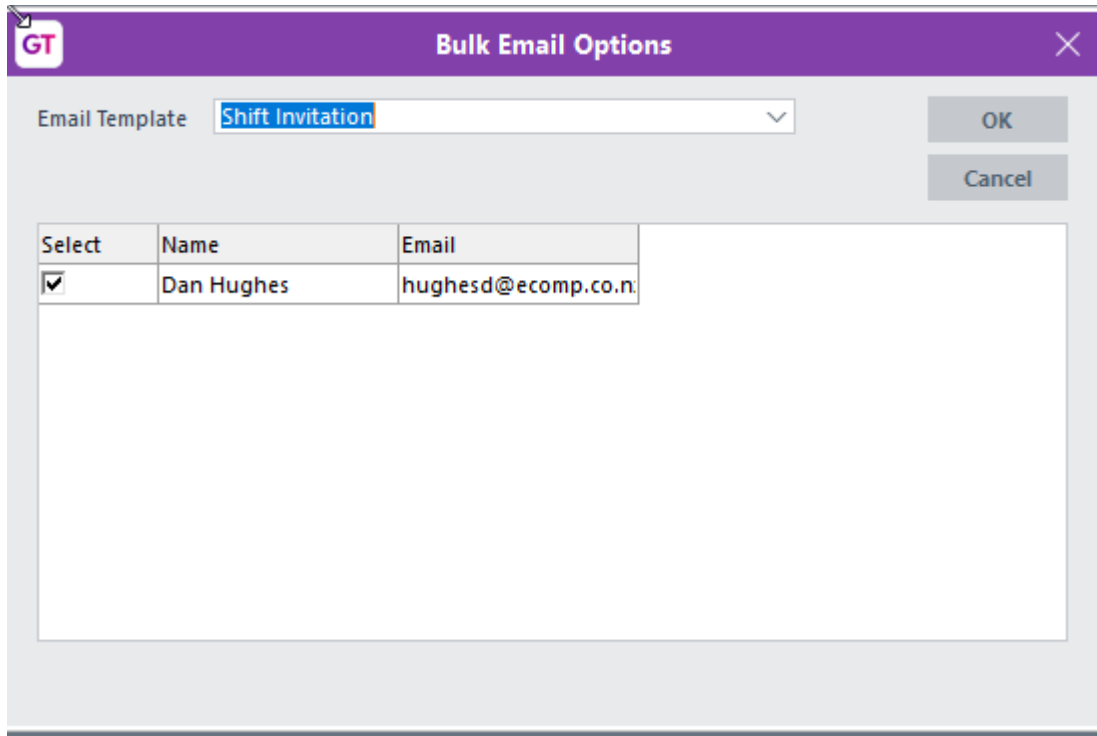
LIST TAB



On the List sub-tab a table will show the currently selected employees for the shifts under a job. This table has the following columns

Column	Available	Details
Employee Number		The employee matching the criteria for the job
Employee Name		
Job		The recommended job
Shift		The shift recommended for this employee
Employee Type		Displays the employee type
Default Ordinary Activity Code		For the employee type and job area from application control setup
Default Overtime Activity Code		For the employee type and job area from application control setup
Status	A drop-down list of statuses for Shift Employee allocations.	These can be changed manually or as a result of a process (e.g. Bulk Email)
Employee Address		
Employee Phone		
Employee Email		

Three buttons will be available to perform actions on the list of employees.



These actions are Bulk Email, Dial and Create Shift

Bulk Email

This integrates with the CRM email template maintenance and requires the CRM Basics module to be purchased. If CRM Basics isn't active, then the button will be disabled. Clicking on the button will allow the selection of a template (and any attachments associated to the template) and will send an email to any unconfirmed employees on the list. The status for these employees will be updated to "Emailed".

Dial

This integrates with the CRM basics phone setup to call the number of the selected employee. If CRM Basics isn't active, then the button will be disabled.

Create Shift

This will start the process of bulk entry of shift timesheets as described in the next section.

CREATE SHIFT

When the create shift, button is pressed a workbench form will be presented to the user.

This form will have parameters at the top of the screen where the date and shift code and number will have defaulted from the Shift maintenance screen.

Search will display the appropriate employee-shift entries in the table automatically, creating a line for ordinary time and another line for overtime activity as specified on the shift header. The employee must be on a Confirmed status for the lines to be added.

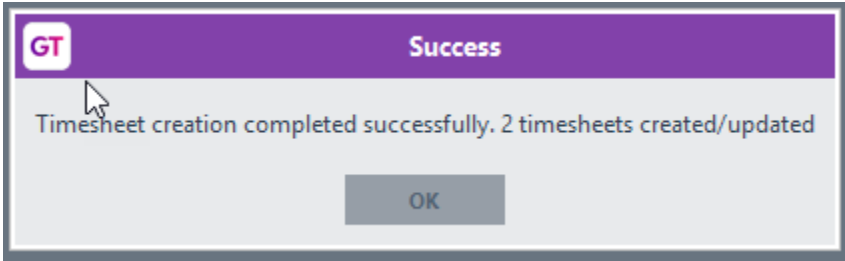
The timesheet workbench will have the following columns

Column	Available	Details
Employee Code		Each employee in the list.
Employee Name		
Job Code		The Job from Shift maintenance
Job Name		
Activity		Ordinary activity code per Shift control Optionally a line for the overtime code if the shift included overtime
Description		
Work centre		The default work centre from the activity code

Description		
Hours		Defaults to the number of hours per the shift maintenance – can be edited.
Notes		Type any narration required to be posted to the job

Entries can be removed from the table using standard Shift-F2 functionality and there will be a blank row for entry of additional timesheet lines.

Reset table button will clear all the rows from the table in case of errors and the user can start from a clean sheet.



To process the timesheet lines, enter a posting date for the transactions and press the Process button. A new timesheet will be created for each employee and relevant lines added to these, if the employee had an existing timesheet for the week, the lines will be added to the existing timesheet. The table will be cleared, and a confirmation message displayed.

GT JC Time Sheet Entry

Batch: S1084 Branch: 03 (Christchurch) Last Reference Number: SMITHJ

Timesheet Header | Line Items

Employee Detail

Surname: Hughes Detail
 First Name: Dan Week Ending Date: 15/06/18
 Employee No: HUGHESD Posting Date: 30/06/18

Narration:

Totals

Sat Sun Mon Tue Wed Thu Fri All Total Hours: 6.00 Total Other:

Date	Day	Job	Description	Activity	Description	Work Ctr	Description	Start	Finish	Hrs/Qty	Notes
15/06/18	Fri	4000	Viaduct	LABASS	Labour - Assembly	ASSEM	Assembly	0.00	0.00	6.0000	Shift 1
15/06/18	Fri									0.00	

Editing an existing Timesheet for Dan Hughes | There is one Timesheet for Dan Hughes

The timesheet can be edited if required.

JC JOB MAINTENANCE

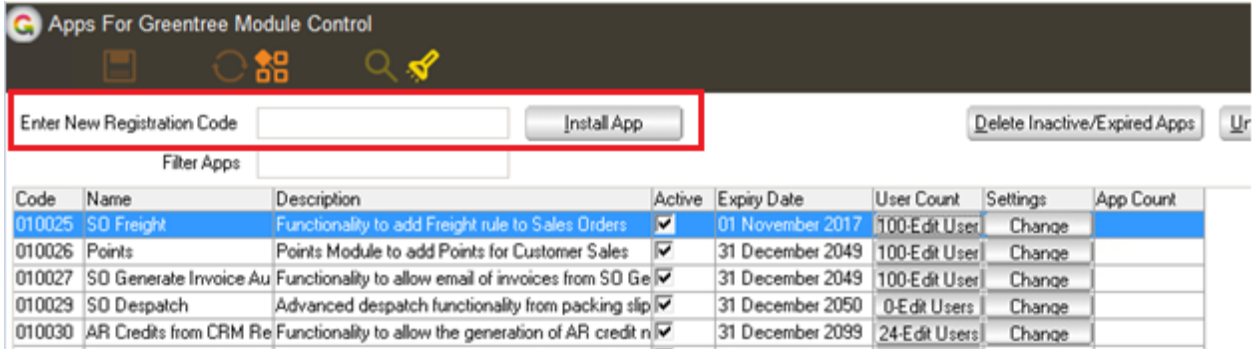
A “Maintain Shifts” button is added to the JC Job Maintenance form to allow the entry of the shift management process from a selected job.

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** |
3. Enter the New Registration Codes supplied and click Install App



Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	✓	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	✓	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	✓	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	✓	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	✓	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the **Job Cost Shift Management** App.
5. Click on the **Edit Users** button and select the users who will be configured to use the Job Cost Shift Management App, for which companies.
6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.

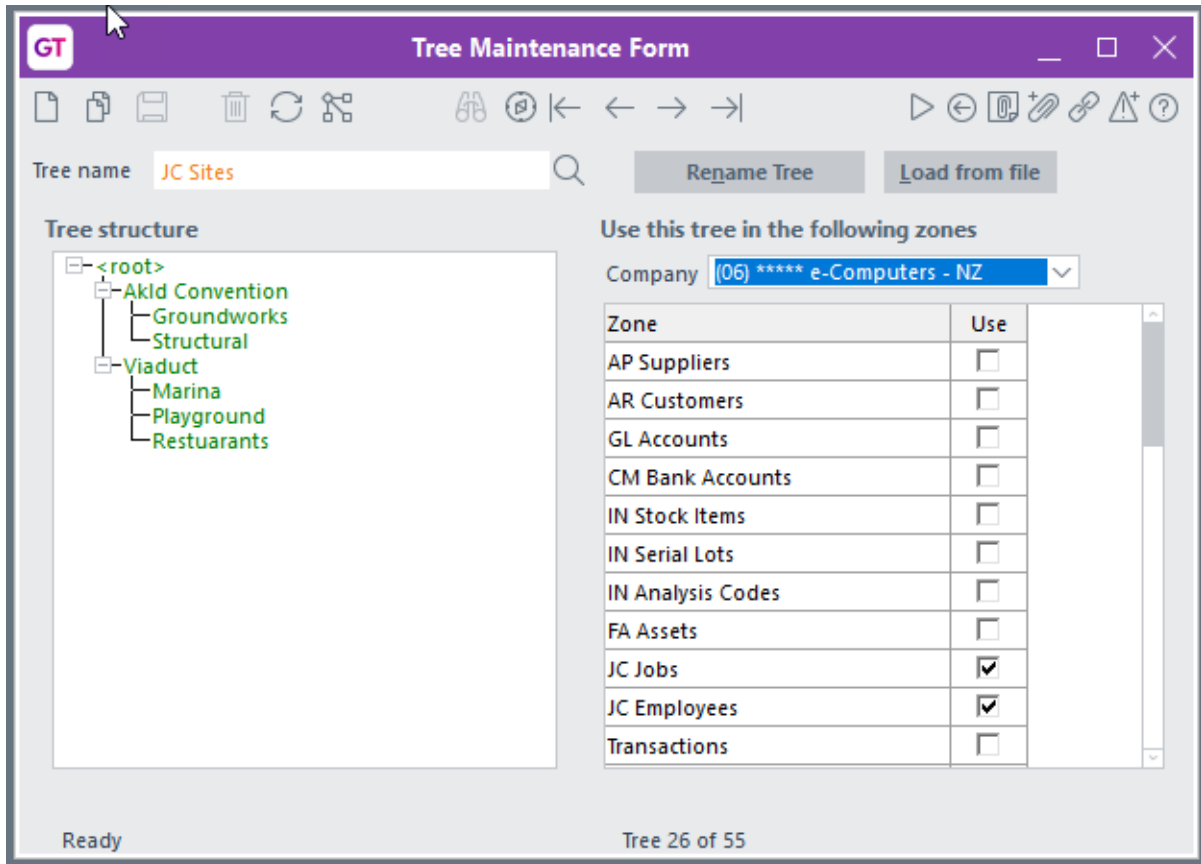
GREENTREE CONFIGURATION

Complete the following set-up in Greentree before configuring the App.

AREA TREE

An area is a job site (such as a factory) identified and below that can be sub-areas that work can be done in. A tree will be used to store this information with the top level of the tree being the job site and the branches being the sub-areas.

| **System** | **Trees** | **Tree Maintenance**



The tree needs to be applicable to jobs and employees.

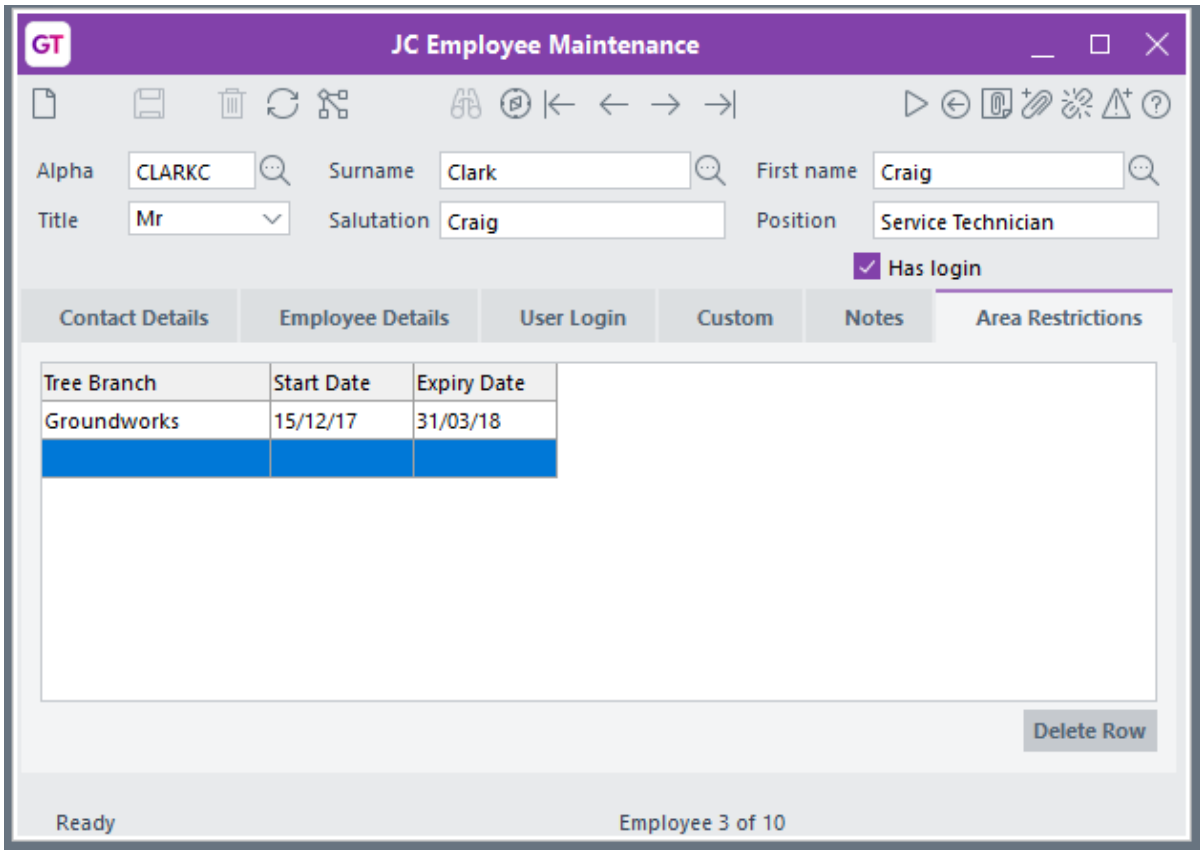
OTHER GREENTREE CONFIGURATION

This configuration can only be done *after* configuring the App control.

JC EMPLOYEE MAINTENANCE

During their employment an employee may be banned from working in certain areas due to breaking safety regulations or some other reason. To record this information a new tab "Area Restrictions" will be added to the JC employee maintenance form. A table will allow the selection of one or more Area tree branches. A column will also be provided to record the expiry date of each restriction.

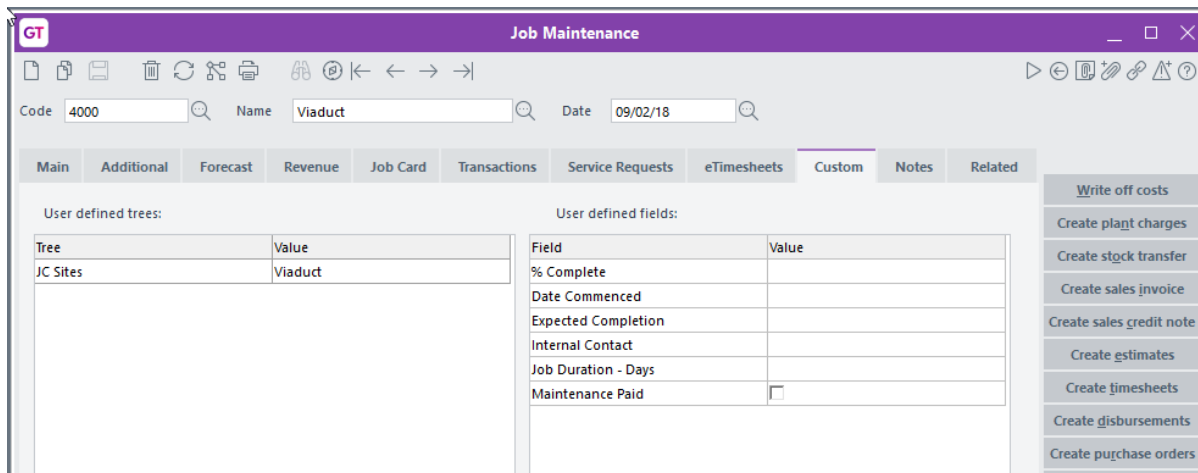
[| System | Job Cost | JC Employee Maintenance](#)



JC JOB MAINTENANCE

Jobs need to be configured to work with Areas.

[| Data Entry | Job Cost | Job Maintenance](#)



On the Custom tab select the Site\Area that each job relates to.

OPTIONAL GREENTREE CONFIGURATION

The following items may be configured and can be selected when building lists of employees for shifts.

JC EMPLOYEE MAINTENANCE \ TREES

Lists of employees for shifts can be built using Employee trees. You would need to configure the trees in Tree Maintenance and assign the JC Employees to them.

Tree	Value
JC Sites	
Region-NZ	Auckland

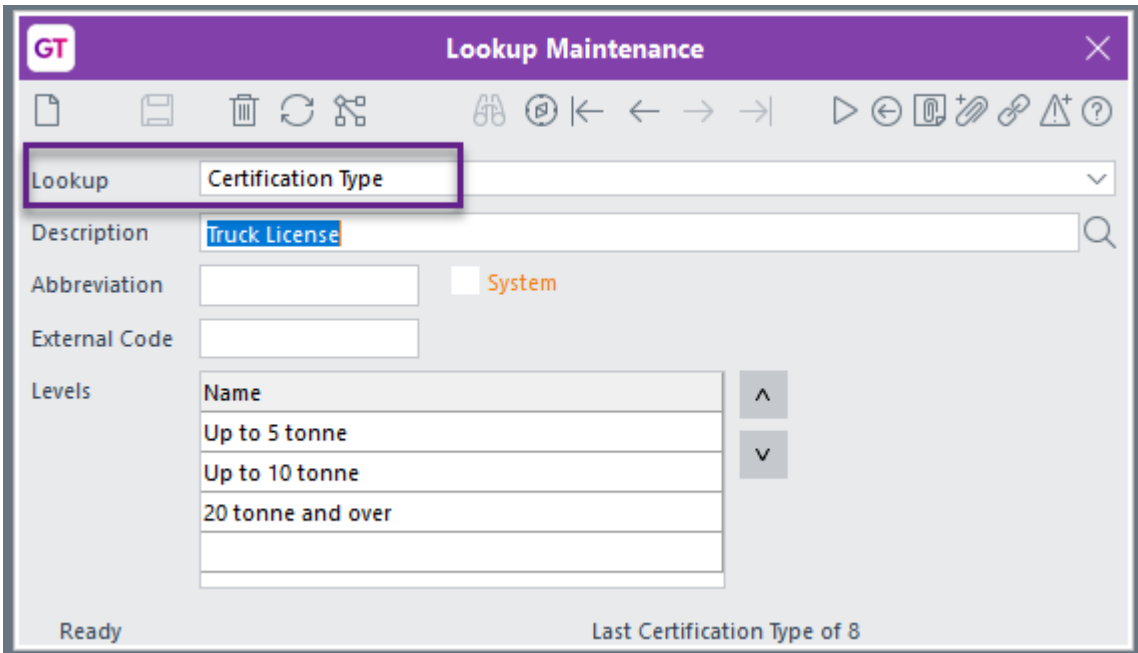
Field	Value
Password	

If the organisation operates across the country you may have a Region tree to narrow down the selection to employees within a geographical location.

HR LOOKUP MAINTENANCE

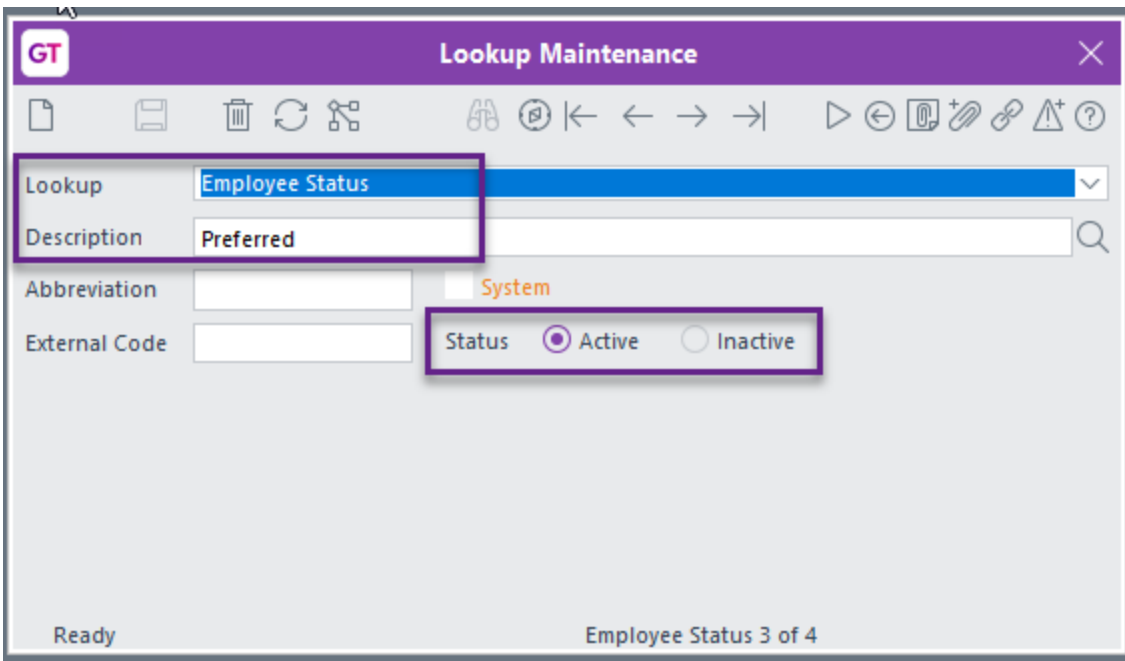
[| HR | System | Utilities | Lookup Maintenance](#)

Certification Types



Certificates are used where a skill must be certified and is required for the work being done.

Employee Status



You can setup different status

GT HR Employee Maintenance - Human Resources

Code **CLARKC** Surname **Clark** First Name **Craig**

Main Balance Tracking Other Positions Functions CV Involvement Medical Org Chart Development Key Dates Eve

Title **Mr** Male Female **Status** **Active**

Usual Name **Craig Clark** Phone **(09) 360 2413**

Salutation **Craig** A/H Phone **(09) 360 5522**

Position **Service Technician** Mobile **(027) 495 1219**

Date of Birth / / Fax **(09) 360 2400**

Profit Centre **0202 (Sales and Marketing 02)** Email **super@greentree.com**

Branch **01 (Auckland)** Start **12 / 05 / 2007** Finish / /

Street Address **Postal Address** Same as Street Address

Address **56 Garriet Road** Address **56 Garriet Road**

They then show under standard HR employee maintenance.

CRM COM INTERFACE AND EMAIL TEMPLATE MAINTENANCE

| Workflow | System | Rule Class Maintenance

The VAppsJCSHift class needs to be added to the system so that fields can be used within the COM Interface and email templates

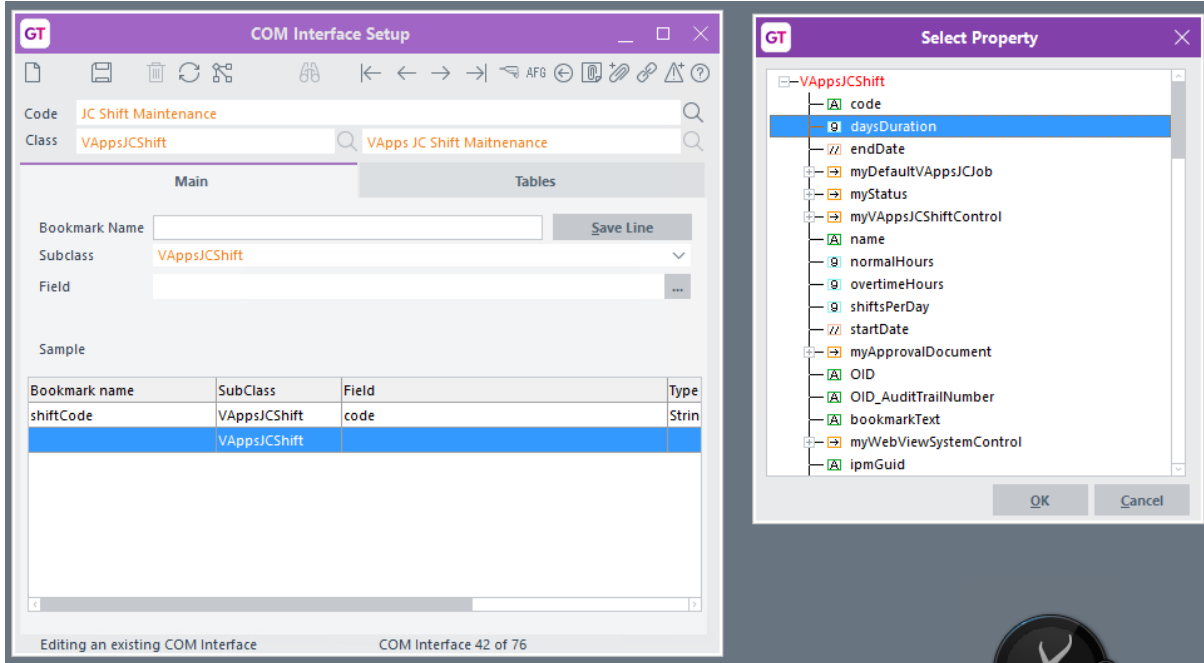
The screenshot shows the 'Class Maintenance' window in GT. The 'Class' field is 'VAppsJCSHift' and the 'Description' is 'VApps JC Shift Maitnenance'. The 'Main' tab is active, showing the 'Module' set to 'JC'. There are four checkboxes: 'Is a system record' (unchecked), 'Is a Primary Class' (checked), 'Can be Form driven' (checked), and 'Does not belong to a company' (unchecked). The 'Programmatic Events' section is empty. The 'Collection Path' is 'myVAppsControl:myVAppsJCSHiftControl:allVAppsJCShifts' and the 'Company Path' is 'myVAppsJCSHiftControl:myVAppsControl:myVAppsCompany:myCompany'. The 'Display Name' field is empty. The 'Approval Desc' field is empty. The status bar shows 'Ready' and 'Document Rule Class 741 of 747'.

Search for the class, type in the module.

Search for the paths per above for collection and company.

| CRM | System | Utilities | COM Interface Definition

Define an interface definition to give access to fields relating to a shift. This will allow you to have a generic email template and use it for emailing all different shifts.



Type in a code and then select the class setup above.

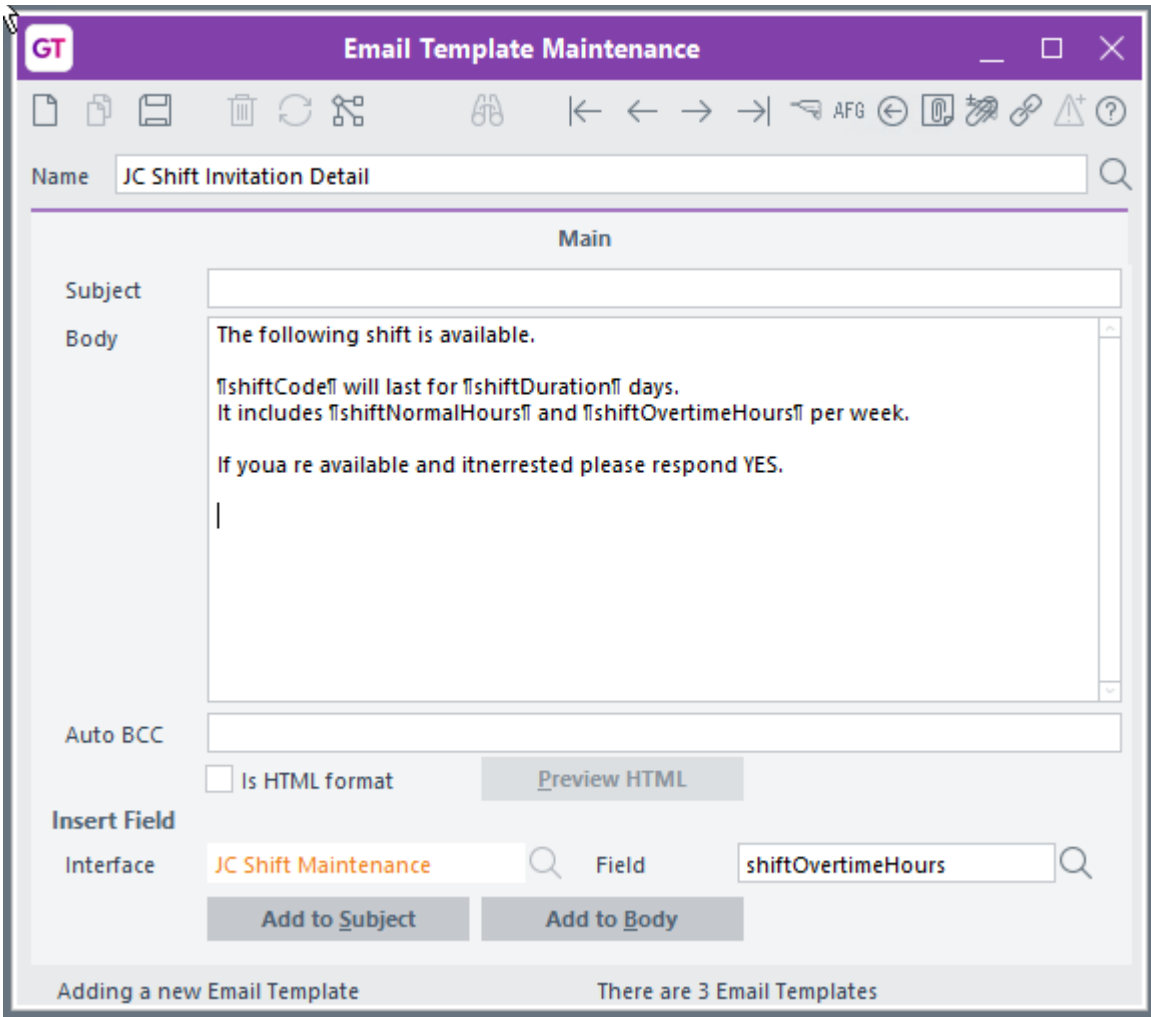
Click on the ... to display the list of fields available, select the field from the list and click OK.

Give the bookmark a name – this is what you will see when defining the email template.

Add all the fields you think you will use in the emails.

| CRM | System | Utilities | Email Template Maintenance

Define an email template using the fields from the COM interface defined above.



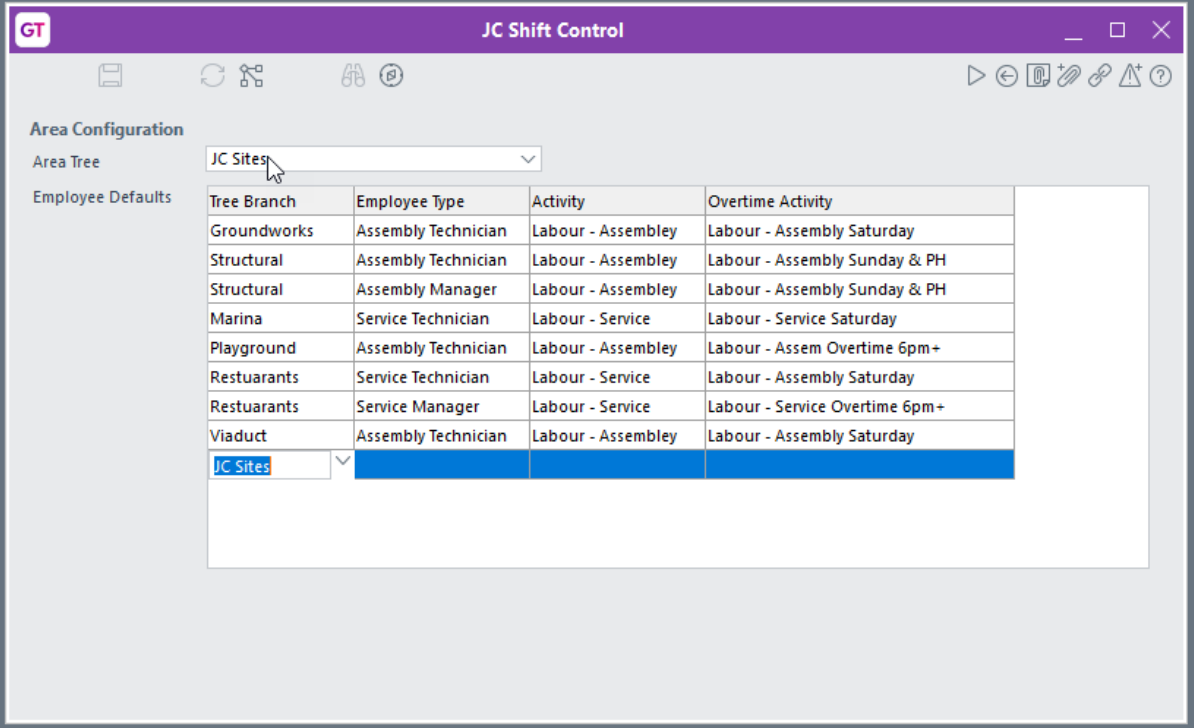
APP CONFIGURATION

| System | Apps For Greentree | Apps Module Control |

1. Select/Highlight the **Job Cost Shift Management App**.
2. Click on the **Change** button

Each area tree branch will have a default normal time activity code and a default overtime activity code for each employee type.

Select the tree created above as your Area tree.



The screenshot shows the 'JC Shift Control' application window. The 'Area Configuration' section is active, with the 'Area Tree' dropdown menu set to 'JC Sites'. Below this, there is a table with the following data:

Tree Branch	Employee Type	Activity	Overtime Activity
Groundworks	Assembly Technician	Labour - Assembly	Labour - Assembly Saturday
Structural	Assembly Technician	Labour - Assembly	Labour - Assembly Sunday & PH
Structural	Assembly Manager	Labour - Assembly	Labour - Assembly Sunday & PH
Marina	Service Technician	Labour - Service	Labour - Service Saturday
Playground	Assembly Technician	Labour - Assembly	Labour - Assem Overtime 6pm+
Restuarants	Service Technician	Labour - Service	Labour - Assembly Saturday
Restuarants	Service Manager	Labour - Service	Labour - Service Overtime 6pm+
Viaduct	Assembly Technician	Labour - Assembly	Labour - Assembly Saturday
JC Sites			

Enter lines for each site area, employee type and their default activity for ordinary and overtime.

The lines need to correspond to the level that will be assigned to jobs.