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

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.

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.

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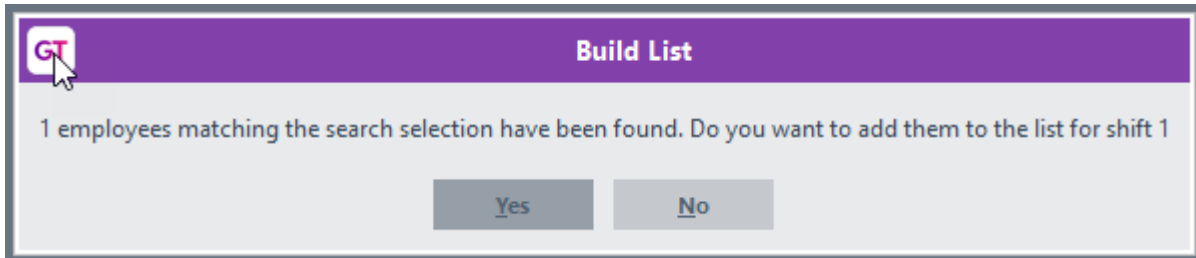
A prompt will be shown "X employees matching the selection have been found. Do you want to add them to the list for shift XYZ". Answering Yes will switch the display to show the list tab with the employees populated in the table.

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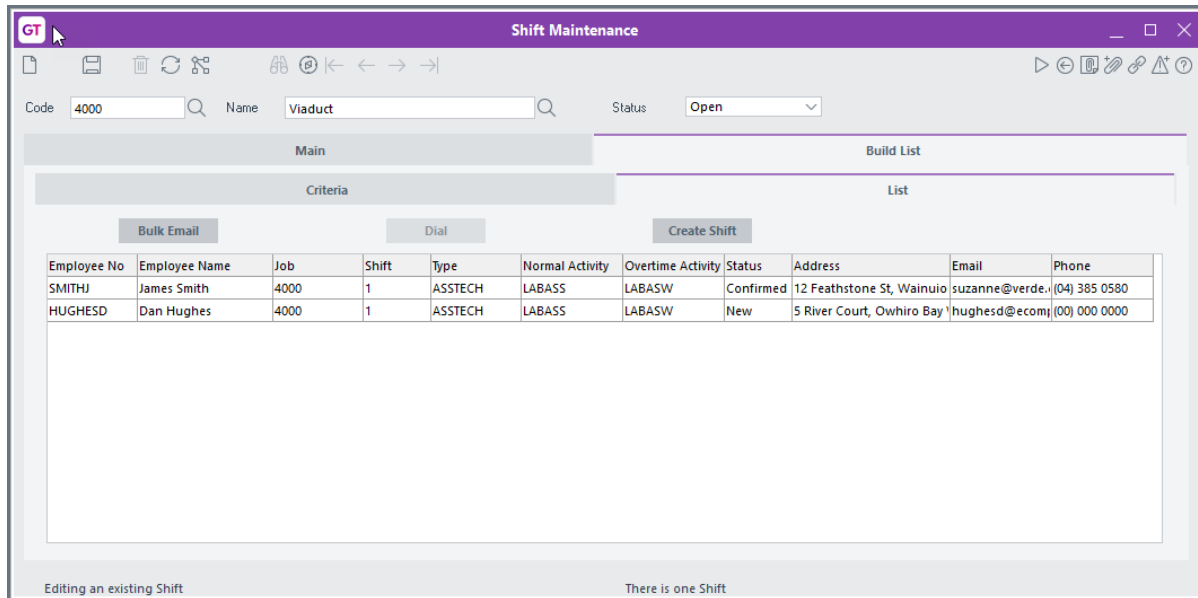
On the List sub-tab a table will show the currently selected employees for the shifts under a job. This table has the following columns

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.
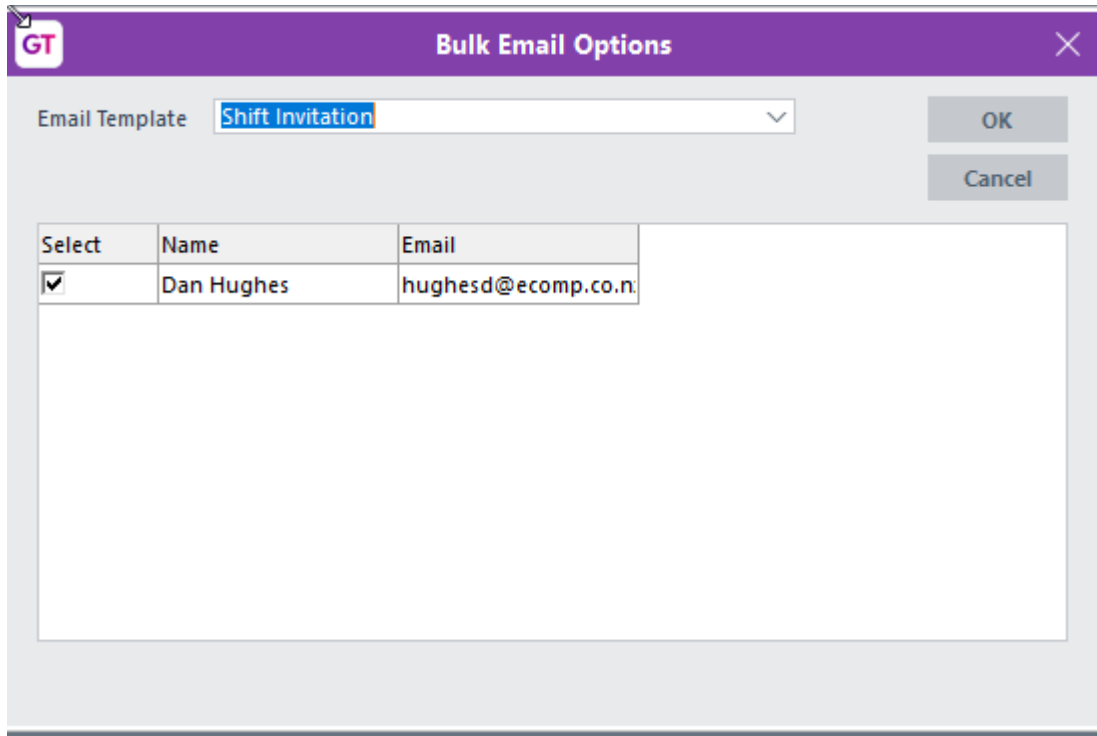
These actions are Bulk Email, Dial and Create Shift

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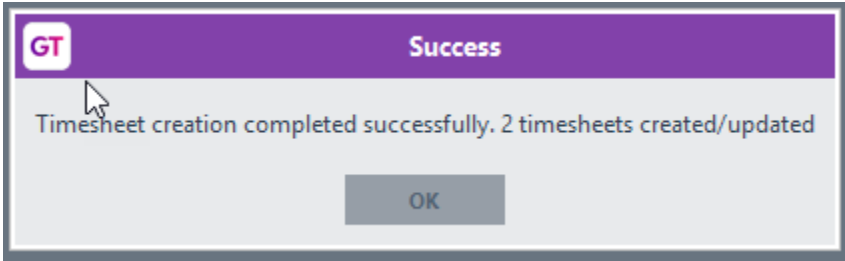
To process the timesheet lines, enter a posting date for the transactions and press the Process button. A new timesheet will be created for each employee and relevant lines added to these, if the employee had an existing timesheet for the week, the lines will be added to the existing timesheet. The table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

The timesheet can be edited if required.

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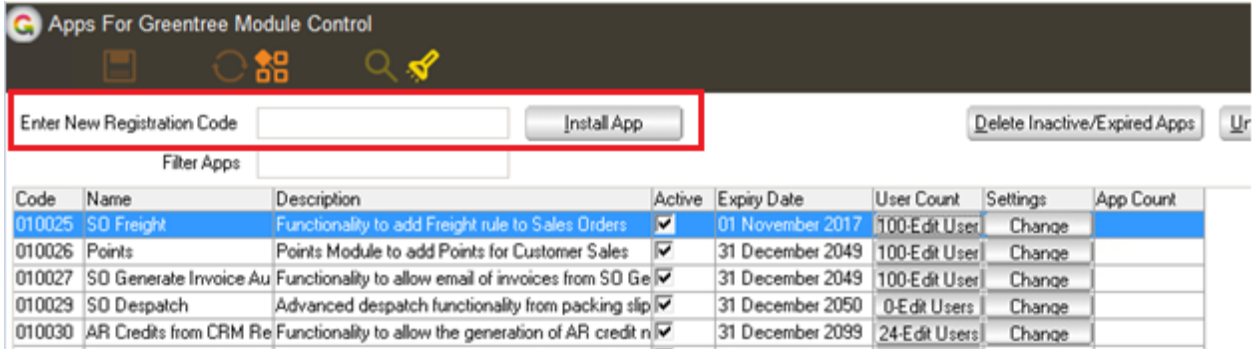
A "Maintain Shifts" button is added to the JC Job Maintenance form to allow the entry of the shift management process from a selected job.

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

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
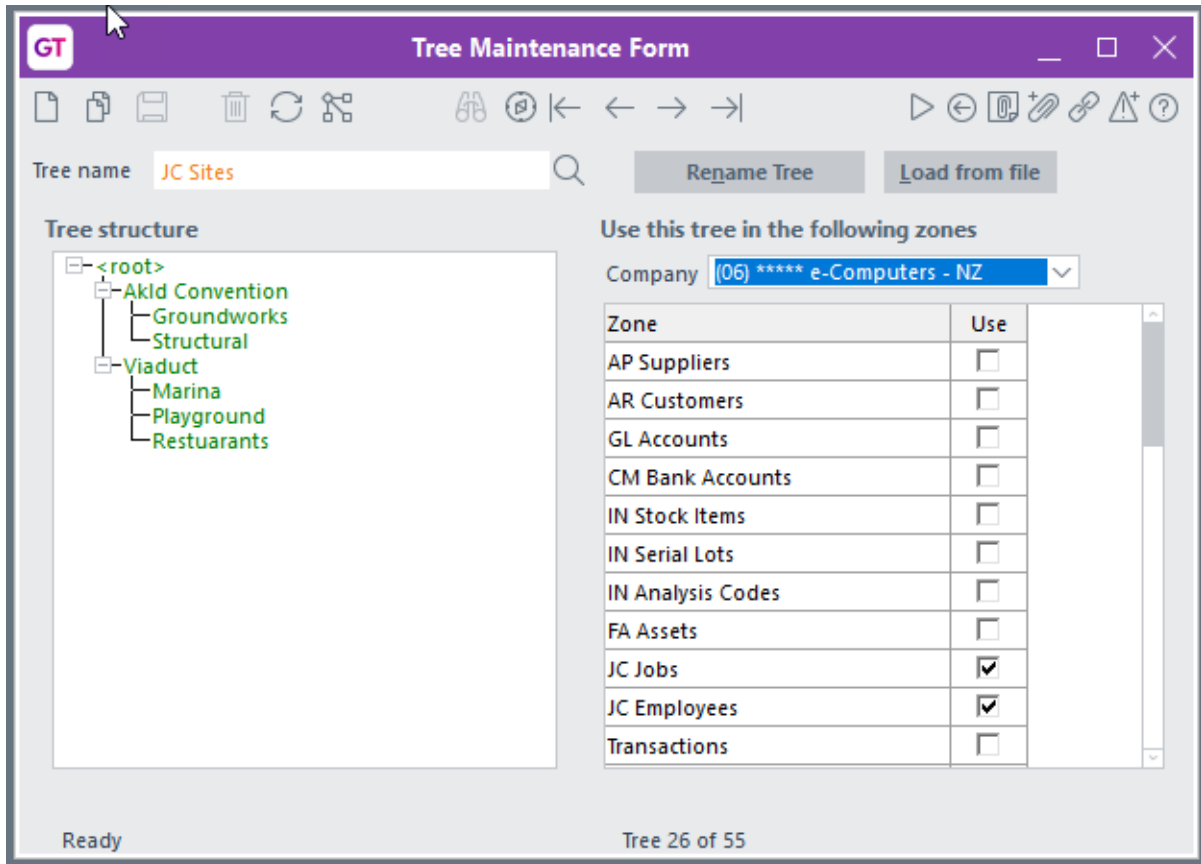
The tree needs to be applicable to jobs and employees.

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
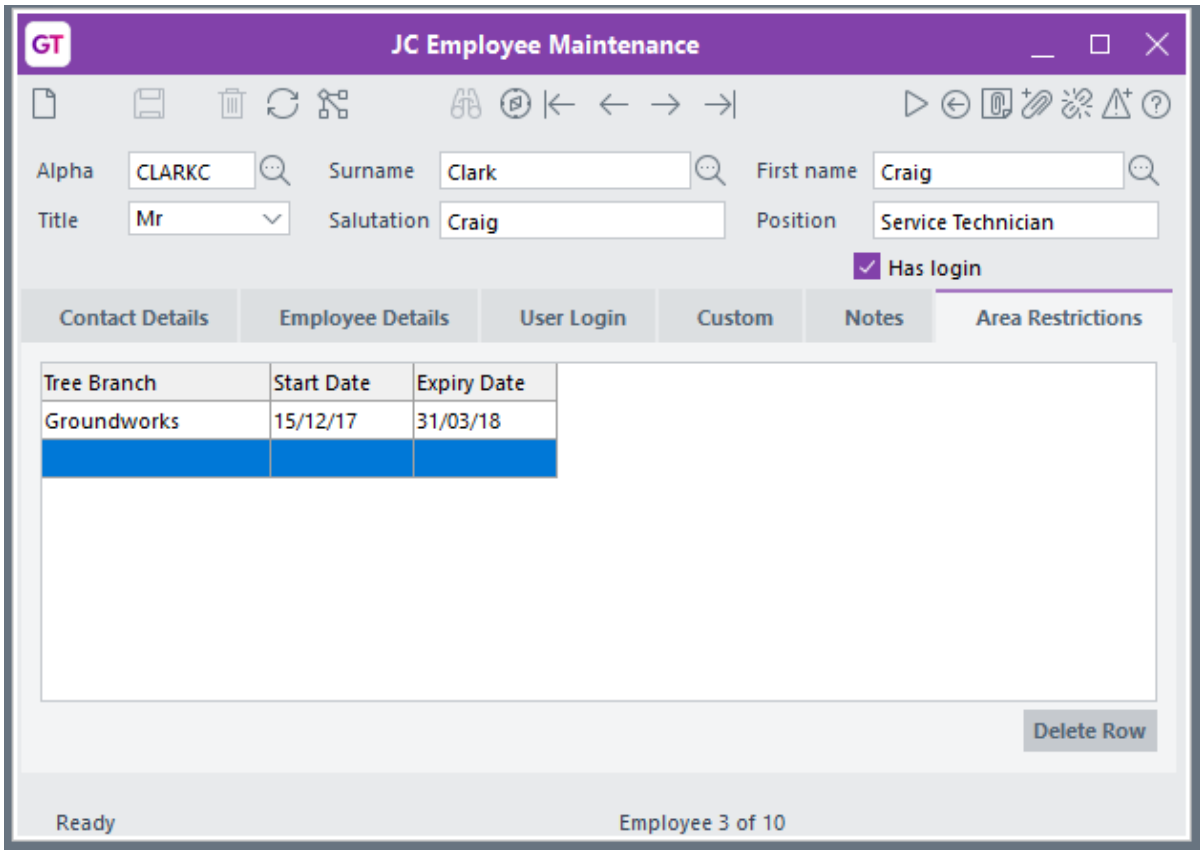
JC JOB MAINTENANCE

Jobs need to be configured to work with Areas.

| Data Entry | Job Cost | Job Maintenance
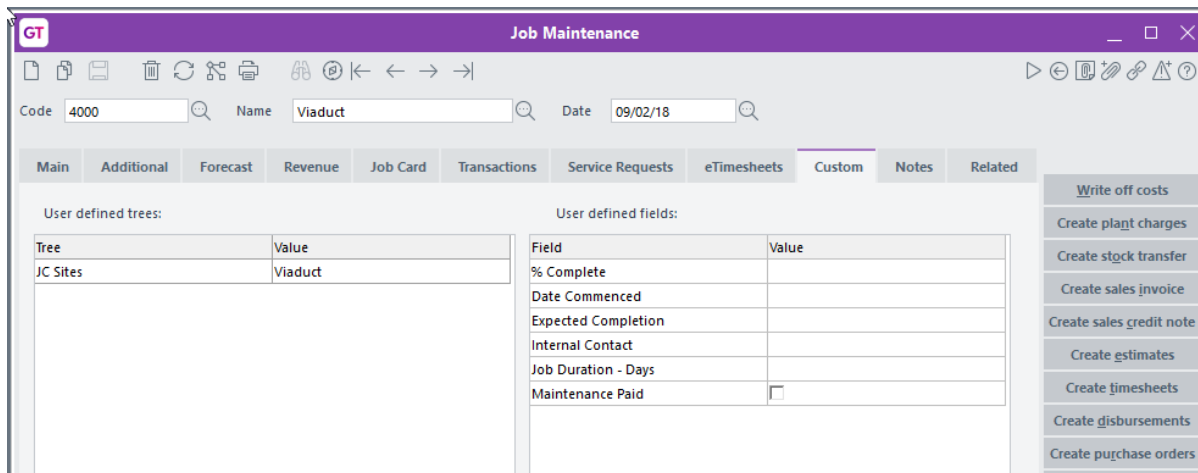
On the Custom tab select the Site\Area that each job relates to.

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.

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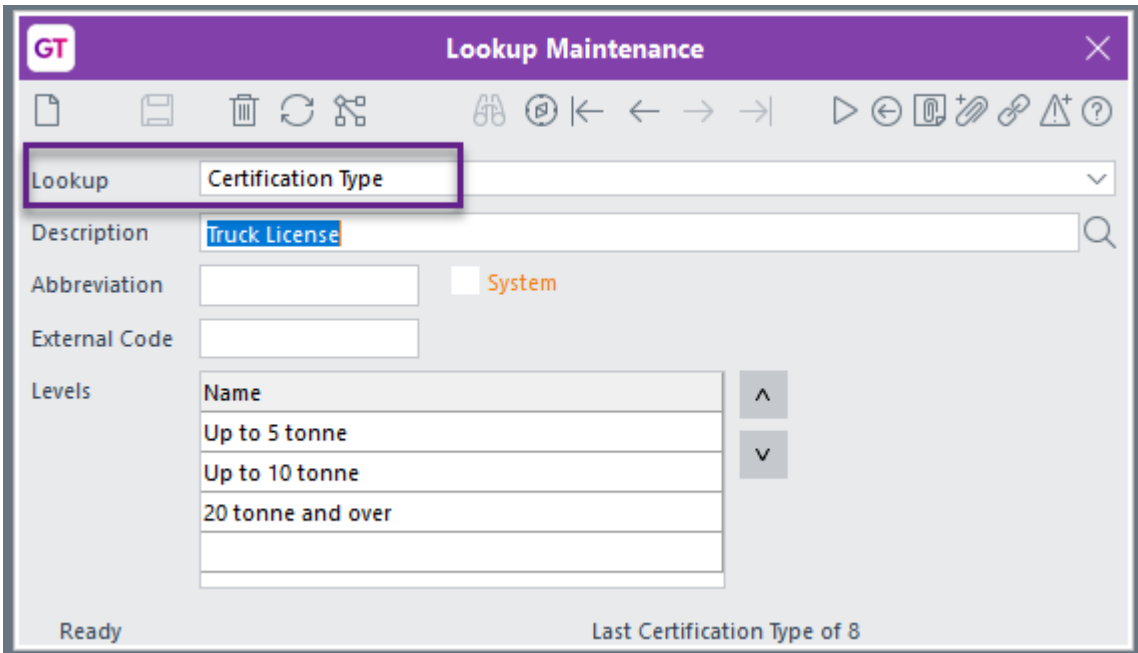
Certificates are used where a skill must be certified and is required for the work being done.

Employee Status
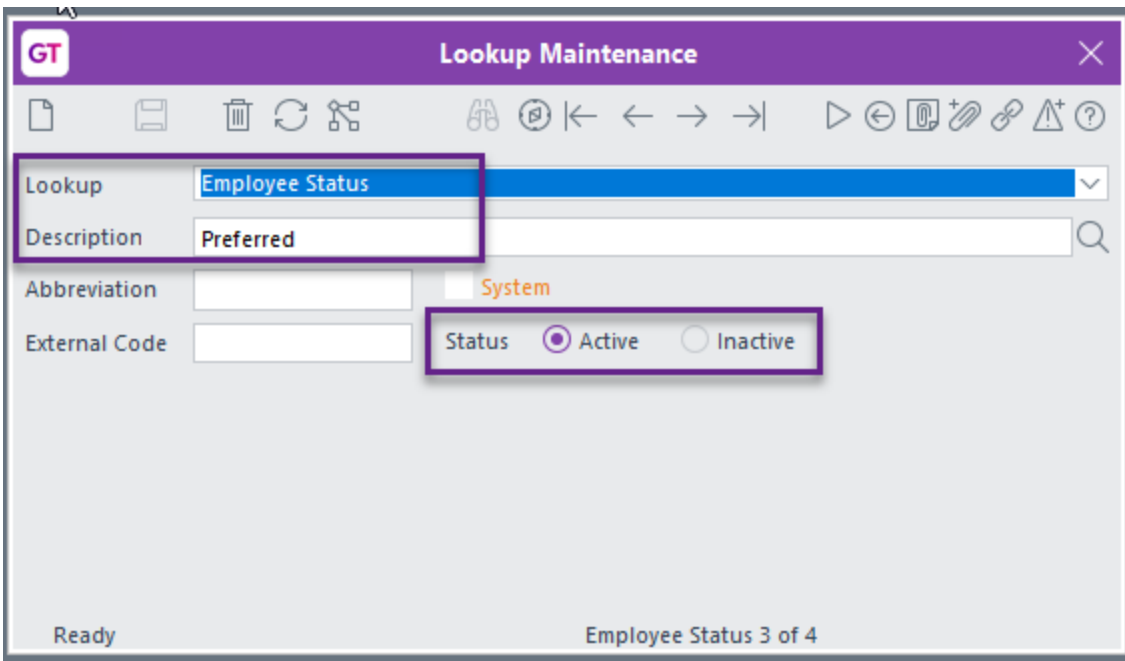
You can setup different status

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

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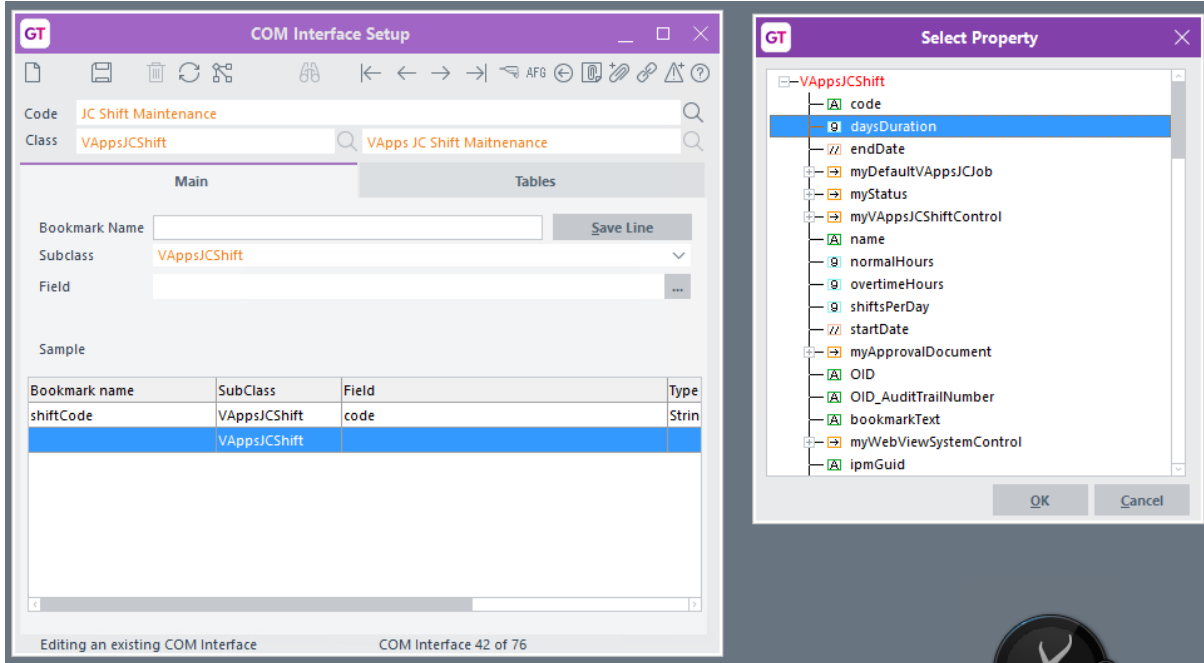
Type in a code and then select the class setup above.

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

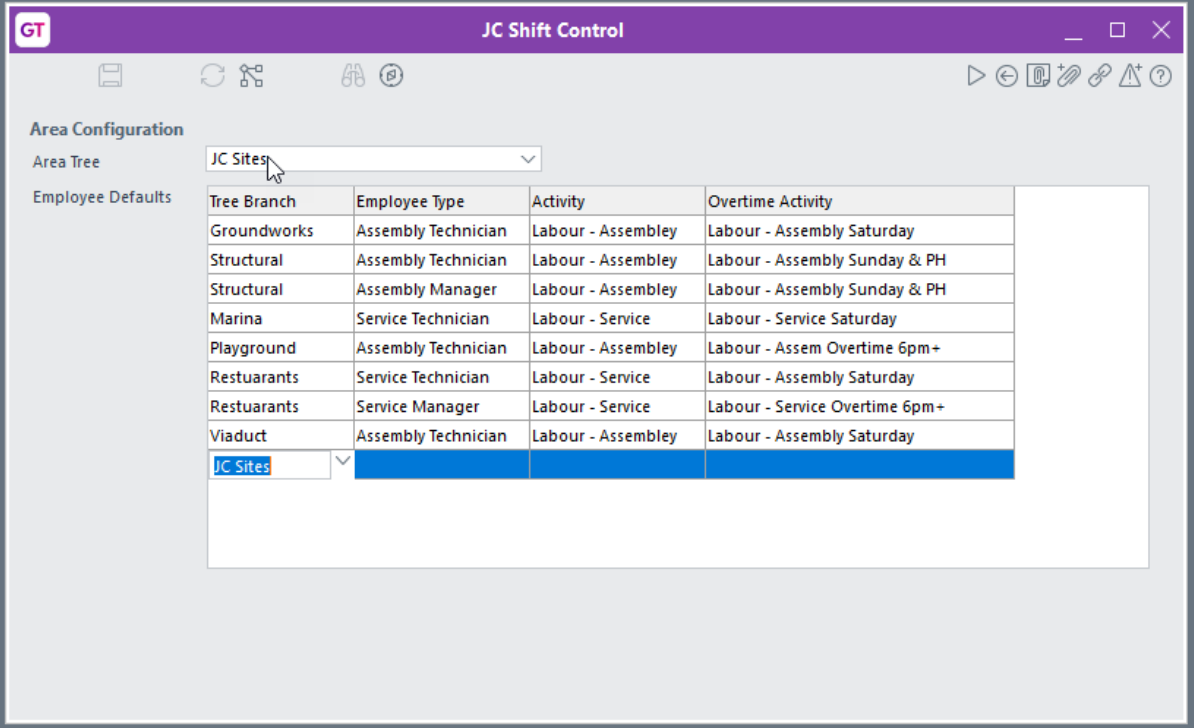Define an email template using the fields from the COM interface defined above.
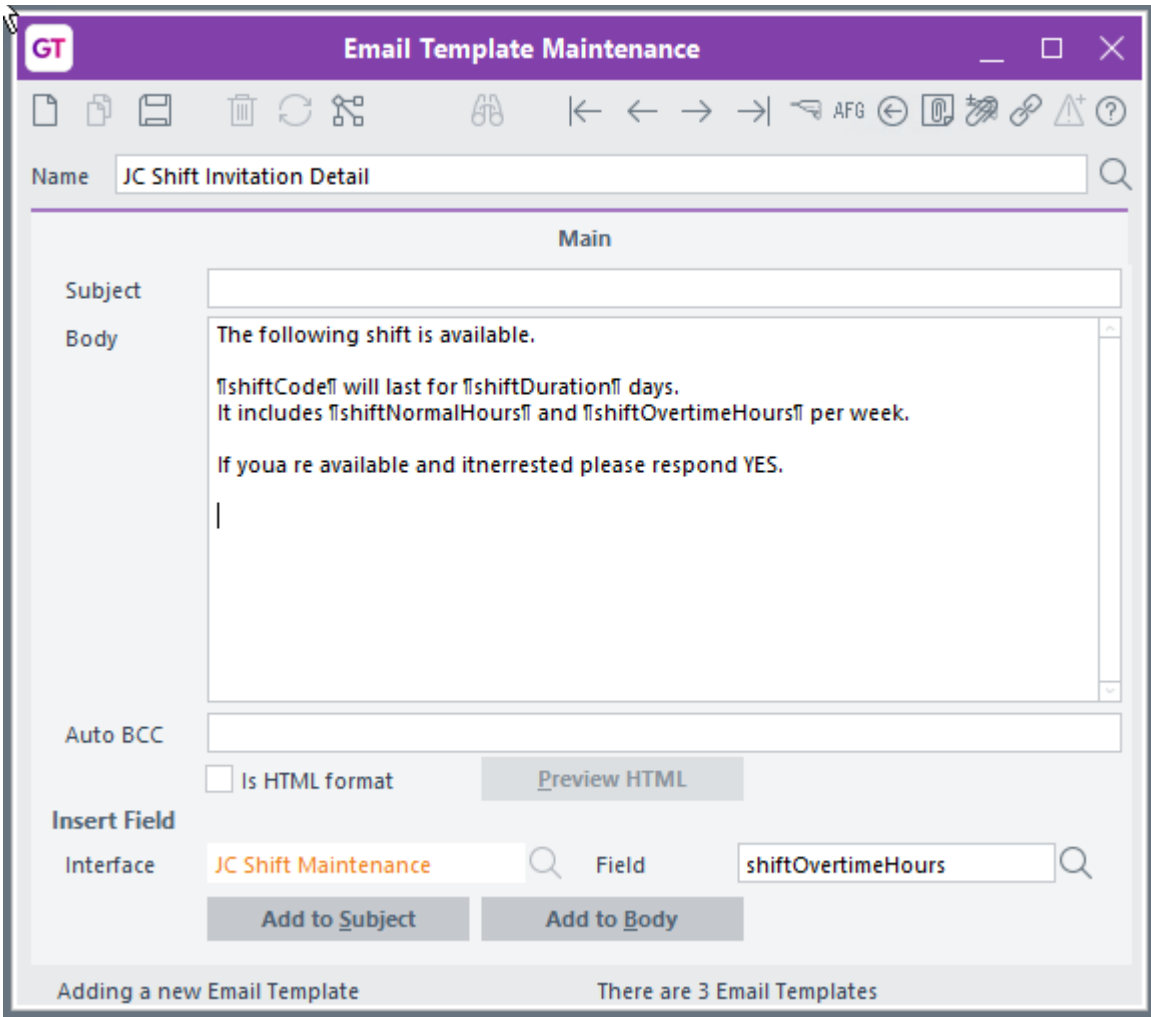
APP CONFIGURATION

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.

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.