

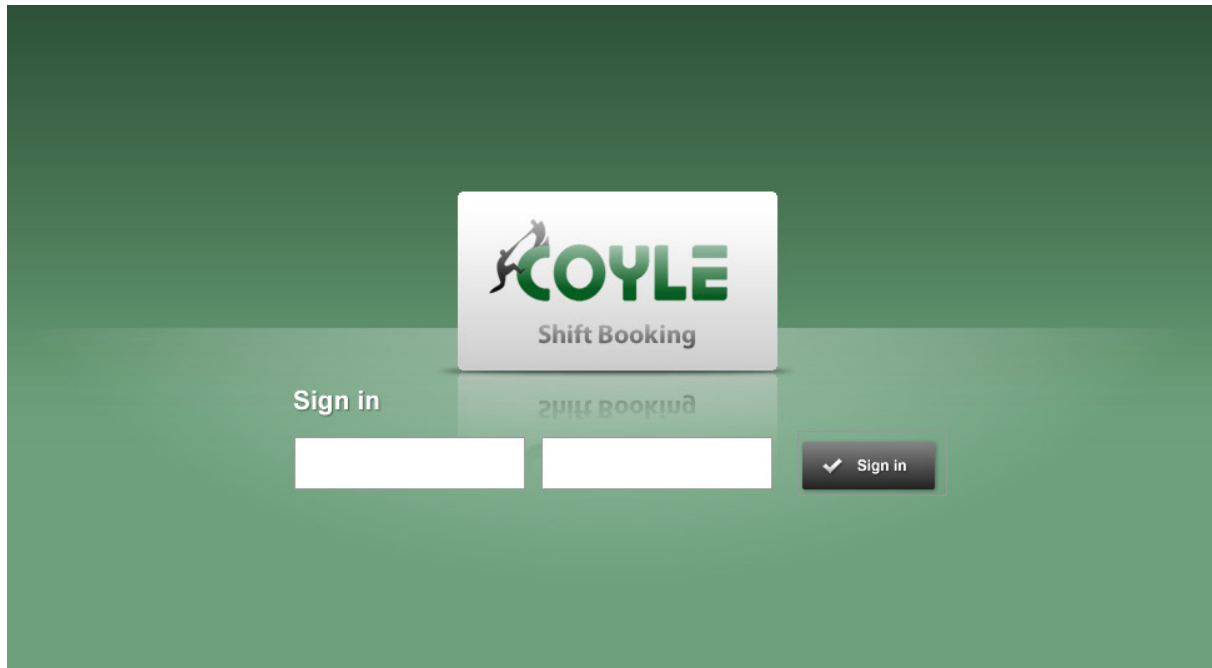


SHIFT BOOKING SYSTEM

— **GUIDE** —

LOGIN

Visit: **SHIFT.COYLES.CO.UK**, enter your username and password and click 'Sign In' (or hit enter).



FORGOTTEN PASSWORD?

Click the 'Forgotten Password?' link at the bottom left of the page and enter your email address for a reminder.

THE INTERFACE

HERE'S A QUICK EXPLANATION OF WHAT EACH PART OF THE SYSTEM DOES.

The Shift Booking System works like a spreadsheet but is designed to save you time by calculating insightful information like Working Time Regulations, Travel Time, Shift Clashes and more ...



TIP

The Shift Booking System always displays your shifts Weekly. Always make sure you're looking at the week that you'd like to work on here.

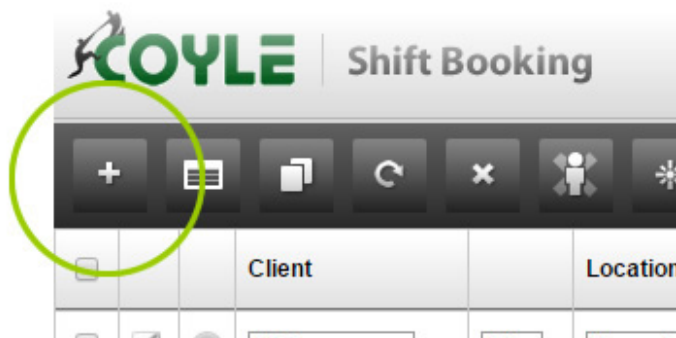
The interface is a web-based shift booking system. It features a top navigation bar with icons for adding shifts, refreshing, reactivating, copying, deleting, reassigning, sending emails, viewing others' shifts, and searching. Below this is a toolbar with a 'Sheet' dropdown set to 'Chris Curd (13)' and a 'Week 9 (2016/2017)' selector. The main area is a spreadsheet table with columns for Client, Location, Duty, Name, Pay Rate, Number, and shift times for each day of the week. Annotations point to various features: 'Add new shifts', 'Refresh screen', 'Reactivate shifts', 'Add new shifts (calendar)', 'Copy existing shifts', 'Delete shifts', 'Reassign shifts to someone else', 'Send shifts by email', 'View someone else's shifts', 'View a different week', 'Smart search', 'Select all', 'Colour code rows', 'Auto suggest dropdown when adding data Key * to see all employees available for the assigned duty / job title', 'Working regulations alert', and 'Accept shifts from another member of staff'.

	Client	Location	Duty	Name	Pay Rate	Number	Sat Start	26th Finish	Sun Start	27th Finish	Mon Start	28th Finish	Tue Start
☐	Amey	CC	Exeter	PTS	0.00		0800	1400	0800	1400	0800	1400	0800
☐	Amey	CC	Exeter	PTS	0.00		0800	1400	0800	1400	0800	1400	0800
☐	Amey	CC	Exeter	PTS	0.00		0800	1400	0800	1400	0800	1400	0800
☐	Baileys	CC	Kings Cross	PTS	0.00		0800	1400	0800	1400	0800	1400	0800
☐	Baileys	CC	Kings Cross	PTS	0.00		0800	1400	0800	1400	0800	1400	0800
☐	Baileys	CC	Kings Cross	Overhea	0.00	07879880610	0800	1400	0800	1400	0800	1400	0800
☐	Baileys	CC	Kings Cross	PTS	0.00	07595601284	0800	1400	0800	1400	0800	1400	0800
☐	Baileys	CC	Kings Cross	PTS	0.00	07767894577	0800	1400	0800	1400	0800	1400	0800
☐	Baileys	CC	Kings Cross	COSS	0.00		0800	1400	0800	1400	0800	1400	0800
☐	May Gurney	PC	Preston Stat	PTS Trac	Accept	Lee Murphy	0.00	2300	0900	2300	0900	2300	0900
☐	May Gurney	PC	Preston Stat	PTS Trac	Accept	Earl Ellis	0.00	2300	0900	2300	0900	2300	0900

ADDING SHIFTS

SIMPLE

Click the following button to add single or multiple shifts a simple form.



Then complete the following form and then click 'Save' to add the shifts to your sheet.

New Row(s) - Simple ✕

Client	Balfour Beatty		
Location			
Initials	CI		
Duty 1	PTs	No.	1
Duty 2		No.	1
Duty 3		No.	1
Duty 4		No.	1
Duty 5		No.	1
From	Saturday	To	Friday
Start	0800	Finish	1600
Save			



TIP

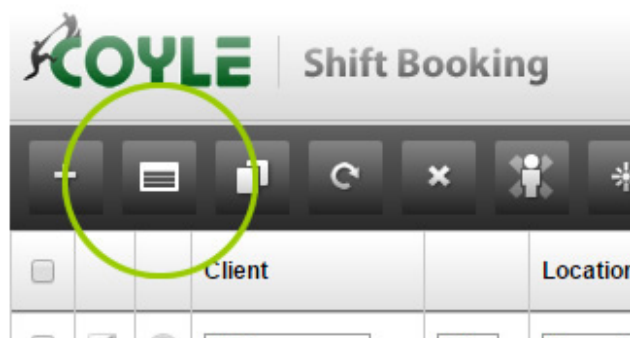
Just start typing the first few letters of the client name and the list will provide suggestions. To see the entire client list, just type * (the star symbol). The same applies to all fields like Location and Duty.

You can add up to 9 shifts for a single duty type here which is useful if you have lots of shifts in the same time pattern.

ADDING SHIFTS

ADVANCED / CALENDAR

Click the following button to add single or multiple shifts through a more detailed Calendar view. It's a good way of adding lots of different shift times and duties at once.



Then complete the following form and then click 'Save' to add the shifts to your sheet.

New Row(s) - Advanced

✕

Client

Location

				Sat Start	7th Finish	Sun Start	8th Finish	Mon Start	9th Finish	Tue Start	10th Finish	Wed Start	11th Finish	Thu Start	12th Finish	Fri Start	13th Finish
Initials	CC	Duty	No. 1														
Initials		Duty	No. 1														
Initials		Duty	No. 1														
Initials		Duty	No. 1														
Initials		Duty	No. 1														

Save

BOOKING EMPLOYEES

ADD AN EMPLOYEE TO A SHIFT

After your Shifts have been added, you'll need to book Employees into the column called 'Name'.

If you know the name of the Employee you wish to book, just start typing their name and the field will provide suggestions. Click on the Employee's name to add them to the shift. The system will tell you if the Employee is available for the shift times that you've entered automatically.

Shift Booking

Update Clients & Local Availability

Sheet

Chris Curd (9)

Week 42 (2016/17)

Search

	Client	Location	Duty	Name	Pay Rate	Pay Period	Number	Sat Start	14th Finish	Sun Start	15th Finish	Mon Start	
☐	☒ Balfour Beatty	CC	Alexandra Pal	COSS	Barry	0.00	0.00		0900	1700	0900	1700	0900
☐	☒ Balfour Beatty	CC	Alexandra Pal	COSS	Barry Metcalfe - Primary [AVAILABLE]				0900	1700	0900	1700	0900
☐	☒ Balfour Beatty	CC	Alexandra Pal	COSS	Barry Tyrer - Secondary [AVAILABLE]				0900	1700	0900	1700	0900
☐	☒ Balfour Beatty	CC	Alexandra Pal	COSS		0.00	0.00		0900	1700	0900	1700	0900
☐	☒ Balfour Beatty	CC	Alexandra Pal	COSS		0.00	0.00		0900	1700	0900	1700	0900
☐	☒ Balfour Beatty	CC	Alexandra Pal	COSS		0.00	0.00		0900	1700	0900	1700	0900

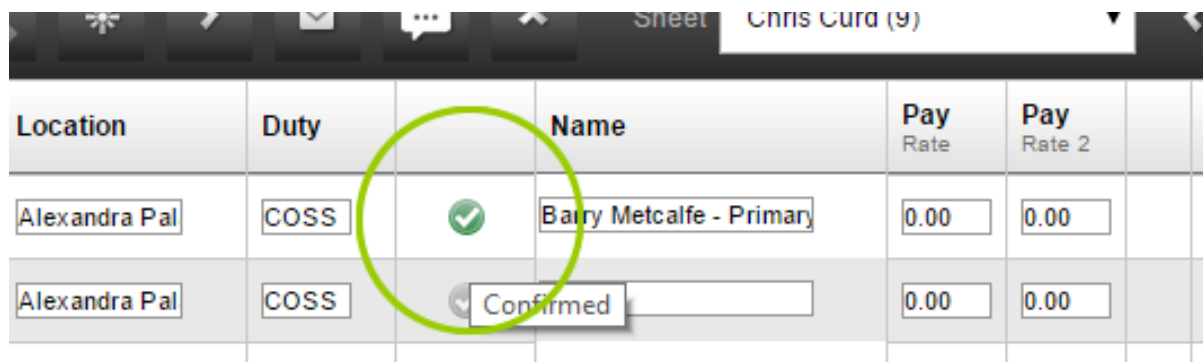


TIP

To see all of the employees, click in the Name field and type * (star symbol). This will show you all Primary Sponsor employees. To see all Secondary Sponsor employees, type - (minus symbol).

CONFIRM AN EMPLOYEE

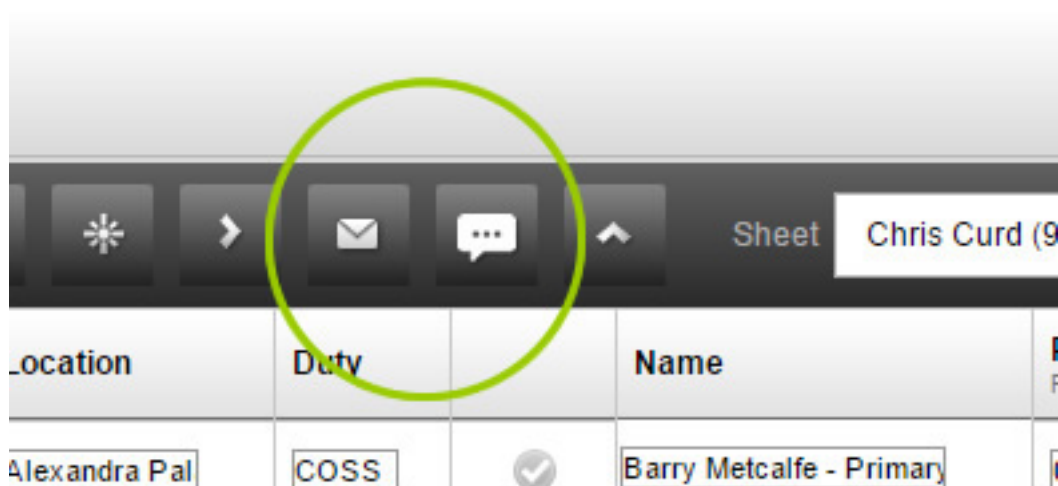
After the Employee has confirmed that they can work, hit the Confirm icon here to complete the booking.



Location	Duty		Name	Pay Rate	Pay Rate 2	
Alexandra Pal	COSS	✓	Barry Metcalfe - Primary	0.00	0.00	
Alexandra Pal	COSS	Confirmed		0.00	0.00	

COMMUNICATE WITH EMPLOYEES

You can email or txt message Employees directly from the Shift Booking System. Simply tick the row that you wish to notify the employee about, and then select either 'Email' or 'TXT' on the top menu.

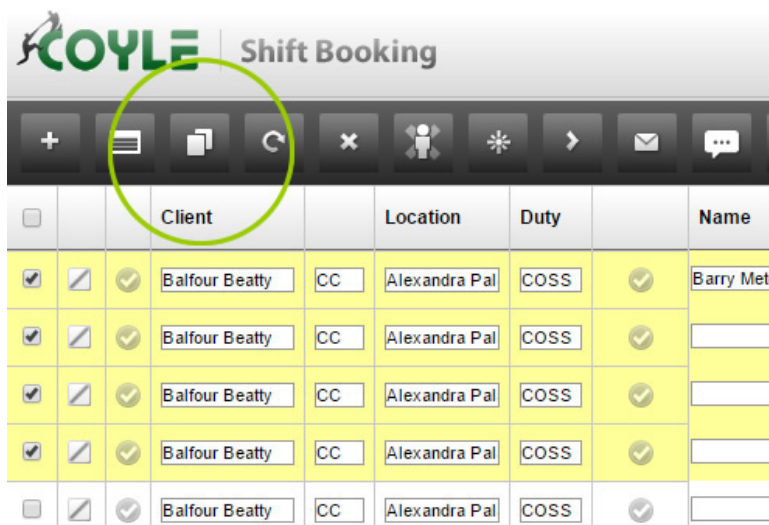


Location	Duty		Name
Alexandra Pal	COSS	✓	Barry Metcalfe - Primary

COPY SHIFTS

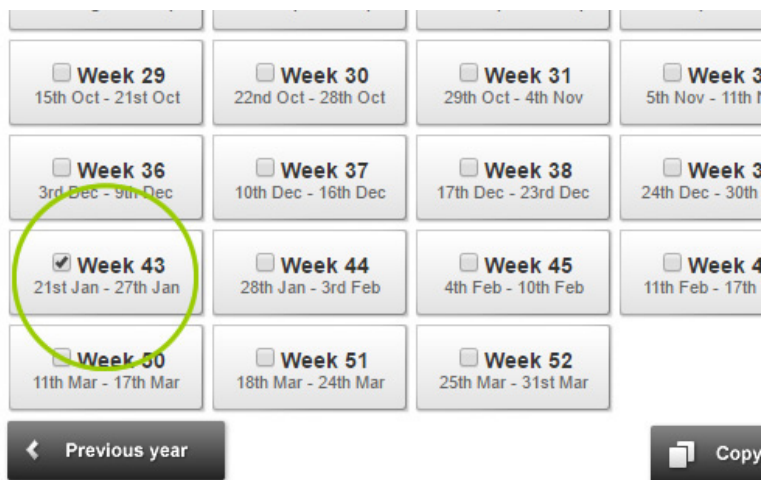
QUICKLY COPY INDIVIDUAL OR ENTIRE GROUPS OF SHIFTS TO ANOTHER WEEK

Select the rows you wish to copy and click 'Copy' on the top menu.



			Client		Location	Duty		Name
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	Barry Met
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	

Then, select the Weeks that you wish to copy the rows to from the Calendar and click 'Copy' to complete.



☐ Week 29 15th Oct - 21st Oct	☐ Week 30 22nd Oct - 28th Oct	☐ Week 31 29th Oct - 4th Nov	☐ Week 32 5th Nov - 11th Nov
☐ Week 36 3rd Dec - 9th Dec	☐ Week 37 10th Dec - 16th Dec	☐ Week 38 17th Dec - 23rd Dec	☐ Week 39 24th Dec - 30th Dec
☒ Week 43 21st Jan - 27th Jan	☐ Week 44 28th Jan - 3rd Feb	☐ Week 45 4th Feb - 10th Feb	☐ Week 46 11th Feb - 17th Feb
☐ Week 50 11th Mar - 17th Mar	☐ Week 51 18th Mar - 24th Mar	☐ Week 52 25th Mar - 31st Mar	

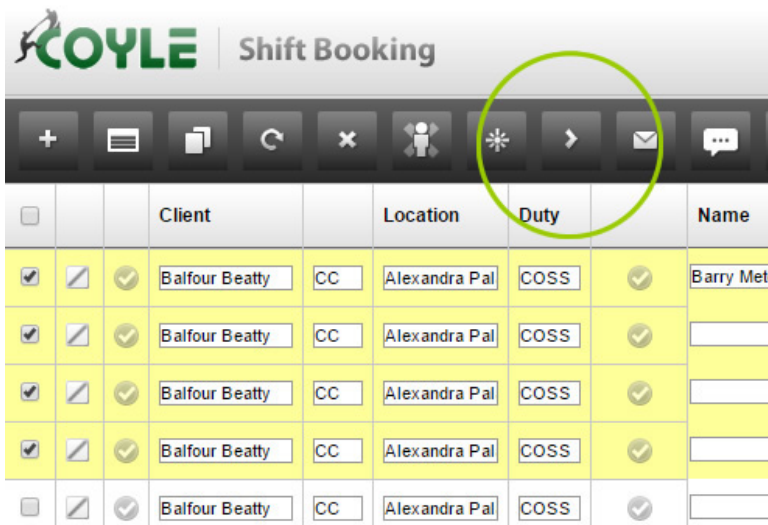
← Previous year

 Copy

REASSIGN SHIFTS

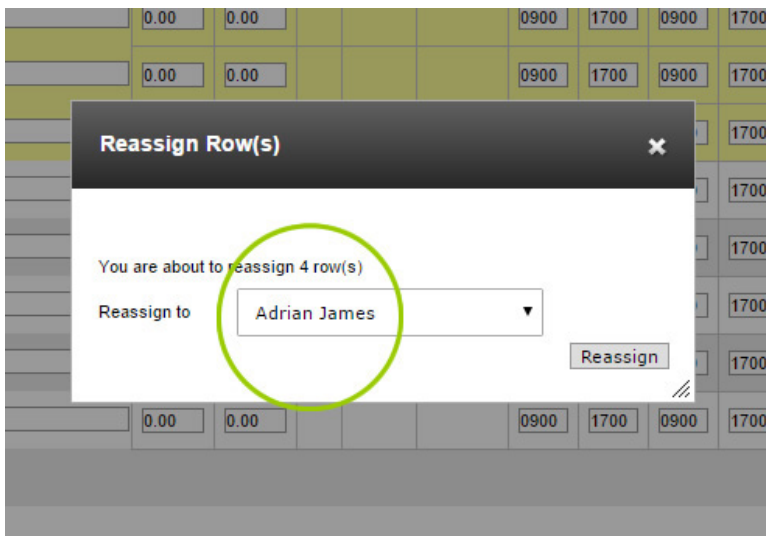
REASSIGN SHIFTS IF YOU CAN NO LONGER FILL THEM OR ARE GOING ON HOLIDAY

You can reassign shifts to another resourcer so that they can continue to fulfill them. Select the rows you wish to copy and click 'Reassign' on the top menu.



			Client		Location	Duty		Name
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	Barry Met
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☒	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	

Then, select the Resourcer you wish to assign the shifts to and click 'Reassign'. You'll need to wait for them to accept the shifts before the process is complete.



Reassign Row(s) [X]

You are about to reassign 4 row(s)

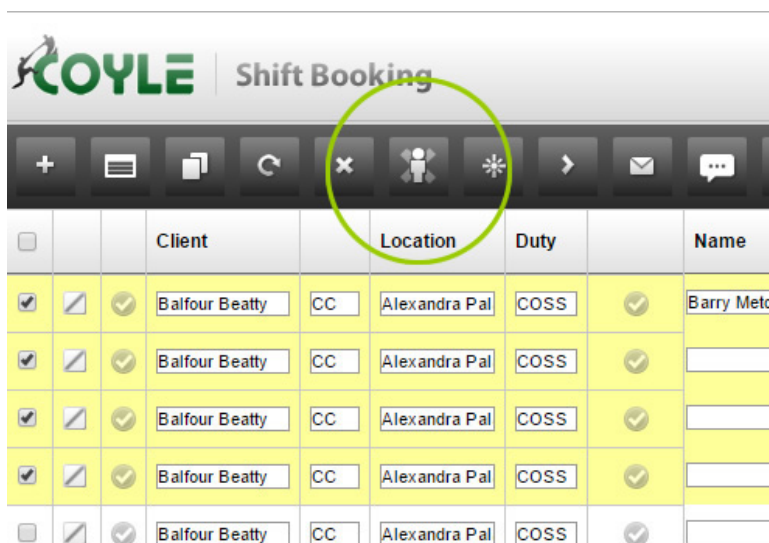
Reassign to: Adrian James ▼

Reassign

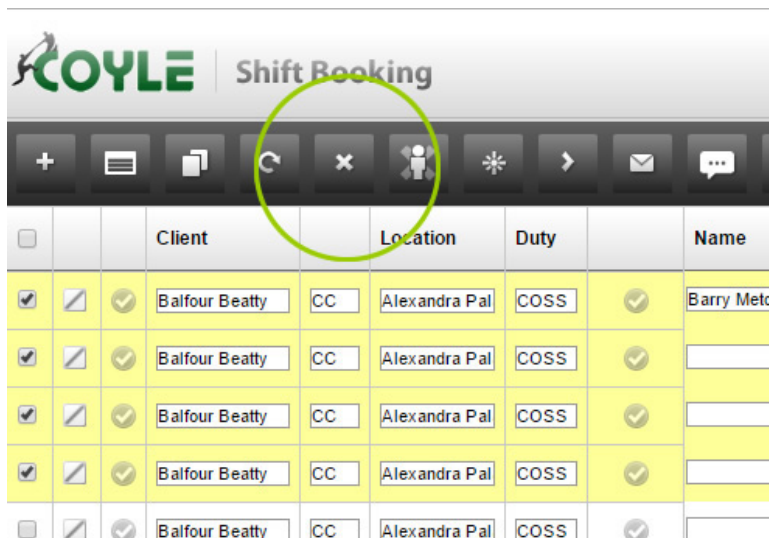
CANCEL A SHIFT

IF THE CLIENT CANCELS A SHIFT, PLEASE DO THE FOLLOWING...

Select the rows you wish to cancel and click 'Cancel' on the top menu.



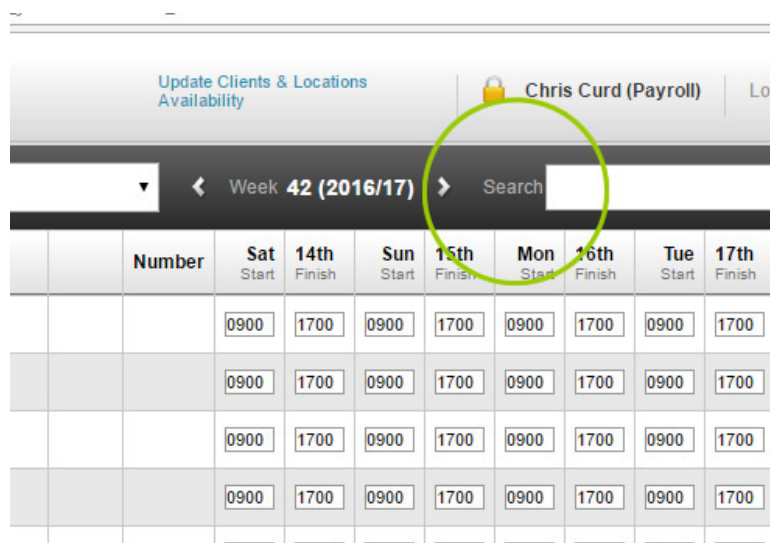
If you created the shift in error you can delete it by selecting it and clicking 'Delete' on the top menu.



SEARCH

A QUICK WAY TO FIND EMPLOYEES, LOCATIONS, DUTY TYPES AND CLIENTS

Type your search term into the search field and hit enter. Please note, the search will only look in the selected week.



Update Clients & Locations Availability

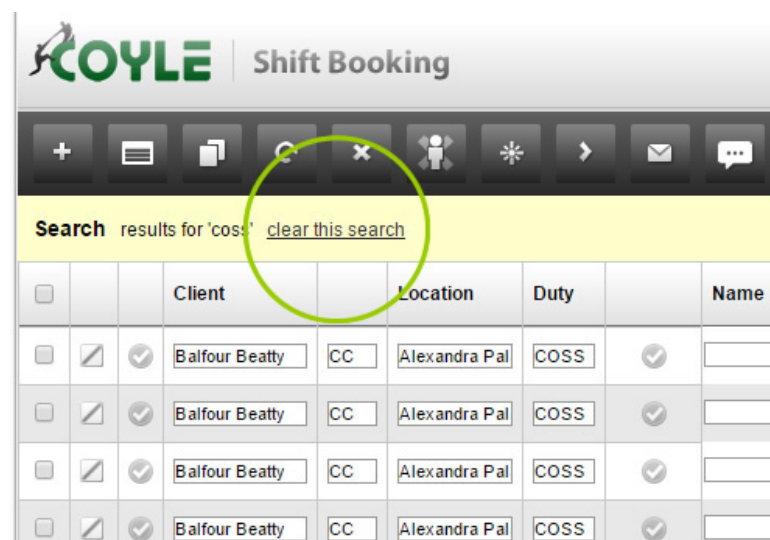
Chris Curd (Payroll)

Week 42 (2016/17)

Search

	Number	Sat Start	14th Finish	Sun Start	15th Finish	Mon Start	16th Finish	Tue Start	17th Finish
		0900	1700	0900	1700	0900	1700	0900	1700
		0900	1700	0900	1700	0900	1700	0900	1700
		0900	1700	0900	1700	0900	1700	0900	1700
		0900	1700	0900	1700	0900	1700	0900	1700

To clear the search once you've finished, click 'Clear this search' in the yellow bar.



COYLE Shift Booking

Search results for 'COSS' [clear this search](#)

	Client	Location	Duty	Name
☐	Balfour Beatty	CC	Alexandra Pal	COSS
☐	Balfour Beatty	CC	Alexandra Pal	COSS
☐	Balfour Beatty	CC	Alexandra Pal	COSS
☐	Balfour Beatty	CC	Alexandra Pal	COSS

COLOUR CODING

YOU CAN HIGHLIGHT YOUR SHIFTS IN VARIOUS COLOURS TO HELP ORGANISE THEM

Simply click on the colour button next to each row to change its colour. Keep clicking to cycling through the various colour options.

			Client		Location	Duty		Name
☐	☐	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	
☐	☒	☒	Balfour Beatty	CC	Alexandra Pal	COSS	☒	

You can then filter your sheet by these colours in the top right menu. For example, you can filter the sheet by everything you've coloured blue.

> Search × OFF										
15th Finish	Mon Start	16th Finish	Tue Start	17th Finish	Wed Start	18th Finish	Thu Start	19th Finish	Fri Start	20th Finish
1700	0900	1700	0900	1700	0900	1700	0900	1700	0900	1700
1700	0900	1700	0900	1700	0900	1700	0900	1700	0900	1700
1700	0900	1700	0900	1700	0900	1700	0900	1700	0900	1700

ALERTS

ALERTS AUTOMATICALLY IDENTIFY PROBLEMS WITH WORKING REGULATIONS, TRAVEL TIME AND SHIFT CLASHES.

If an alert displays as shown below, hover over the alert icon or click on it to show description of the problem.

✓	Keith Pinder	0.00	0.00		F R	07979142055	
✓	Paulene Kruiz	0.00	0.00		F R	07751442079	
✓	Alan Farndon	0.00	0.00		F R	07906581034	1800
✓	Elliott Shiell	0.00	0.00	!	F R	07940701773	
✓	Ravinder Sahota	0.00	0.00		F R	07936326956	
Name		Pay Rate	Pay Rate 2			Number	S
✓	William Freer	0.00	0.00		F R	07761869337	0600
✓	Paulene Kruiz	0.00	0.00		F R	07751442079	
✓	Glen Mark Joyce	0.00	0.00		F R	07903627084	1800

ALERTS CAN BE ANY OF THE FOLLOWING ...

Booking clash
Excessive Hours in Week
Excessive Hours in Shift
Minimum Shift Break
Travel Time / Door to Door Time
Fatigue

THANK YOU

