

Tachomaster Shift Management - User Guide

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Introduction

The Tachomaster Shift Management system provides a comprehensive set of tools for managing shift patterns, worker assignments, and coverage requirements. This guide will help you navigate the system and make the most of its features.

System Overview

The Shift Management system consists of several integrated components:

- **Shift Patterns:** Define when workers are scheduled to work
- **Rotation Cycles:** Create complex rotating patterns like 4-on-4-off and continental shifts
- **Worker Assignments:** Assign patterns to workers with effective dates
- **Coverage Templates:** Define staffing requirements for different shifts
- **Calendar Views:** Monitor assignments and identify coverage gaps
- **Holiday Overrides:** Modify patterns for bank holidays and special events
- **Reports:** Generate agendas and summaries for daily and weekly operations

Getting Started

When you first access the Shift Management system, you'll be presented with the Getting Started page. This page provides an overview of key features and guidance for new users.

The standard workflow for setting up your shift management system is:

1. Create shift patterns
2. Assign patterns to workers
3. Set coverage requirements
4. Use the calendar to monitor and manage schedules

Shift Patterns

Shift patterns are the foundation of the system, defining which days of the week workers are scheduled and what times they work.

Creating Patterns

To create a new shift pattern manually:

1. Navigate to the **Shift Patterns** tab
2. Click the **Add New** button
3. Complete the pattern form:
 - **Pattern Name:** A descriptive name for the pattern
 - **Description:** Optional details about the pattern
 - **Start Time:** When the shift begins
 - **Shift Length (minutes):** Duration of the shift in minutes (e.g., 480 for 8 hours)
 - **Select Days:** Choose which days of the week this pattern applies to
 - **Rotation Cycle:** Optional cycle for complex patterns
4. Click **Save Pattern**

Quick Create Patterns

For common patterns, use the Quick Create feature:

1. Click the **Quick Create** button on the Patterns tab
2. Select from the available templates:
 - **Weekdays (Mon-Fri):** Standard Monday to Friday pattern
 - **Weekends (Sat-Sun):** Weekend only pattern

- **4 On 4 Off:** Four days working followed by four days off
- **Continental Rotation:** Five-week continental shift pattern
- **Day/Afternoon/Night Shifts:** Standard time-block patterns

After creating from the Quick Create you can customise the new pattern to your requirements.

Pattern Name	Description	Start Time	Length	Days	Rotation Cycle	Offset
4 on 3 off	-	09:00:00	8 hrs	(Multi-week)	4-3 Rotation	-
4 on 4 off	-	08:00:00	8 hrs	Mon, Tue, Wed, Thu, Fri, Sat, Sun	4-4 Rotation	-
Rotating Day	-	06:00:00	12 hrs	Mon, Tue, Wed, Thu, Fri, Sat, Sun	2 week day/night rotation	-
Rotating Night	-	18:00:00	12 hrs	Mon, Tue, Wed, Thu, Fri, Sat, Sun	2 week day/night rotation	+7
Weekdays 8am	-	08:00:00	8 hrs	Mon, Tue, Wed, Thu, Fri	-	-
Weekends	-	09:00:00	8 hrs	Sat, Sun	-	-

Managing Patterns

To edit or delete an existing pattern:

1. Find the pattern in the list on the Patterns tab
2. Click **Edit** to modify the pattern's details
3. Click **Delete** to remove the pattern (this will affect worker assignments)

Edit Shift Pattern



Pattern Name:

Description:

Start Time:

Shift Length (minutes):

Select Days:

 Mon
 Tue
 Wed
 Thu
 Fri
 Sat
 Sun

Rotation Cycle:

Cycle Day Offset:

Save Pattern

Cancel

Rotation Cycles

Rotation cycles allow you to create more complex patterns that repeat over longer periods.

Rotation Cycles + Add New				
Cycle Name	Description	Days in Cycle	Working Days	Actions
4-3 Rotation	4 days on, 3 days off	7	4	Edit Delete
4-4 Rotation	4 on, 4 off	8	4	Edit Delete
Two Weekly	-	14	7	Edit Delete
2 week day/night rotation	-	14	5	Edit Delete

Creating Cycles

To create a new rotation cycle:

1. Navigate to the **Rotation Cycles** tab
2. Click **Add New**
3. Complete the cycle form:
 - **Cycle Name:** A descriptive name for the cycle
 - **Description:** Optional details about the cycle
 - **Days in Cycle:** Total number of days in the rotation
 - **Working Days:** Number of working days in the cycle
 - **Use week pattern:** Enable for multi-week patterns with varying days
4. Click **Save Cycle**

Using Cycles with Patterns

To use a rotation cycle with a pattern:

1. Create or edit a shift pattern
2. Select your rotation cycle from the dropdown
3. If using a week-based pattern, you'll need to define each week's working days
4. For day-based cycles, set a **Cycle Day Offset** if needed. This will begin the working days from the offset

Worker Assignments

Once you've created patterns, you can assign them to workers.

Assigning Patterns to Workers

To assign a pattern to a worker:

1. Navigate to the **Worker Assignments** tab
2. Find the worker in the list
3. Click the **+** button in the Actions column
4. Complete the assignment form:

- o **Select Pattern:** Choose the pattern to assign
 - o **Effective From:** Start date for this pattern
 - o **Effective To:** Optional end date (leave blank for ongoing)
 - o **Cycle Start Date:** For rotation cycles, when the cycle begins
5. Click **Assign Pattern to Worker**

You can view a worker's scheduled shifts by clicking the calendar icon next to their assignment.

Worker Assignments											
Search workers...									10 per page ▾		
<input type="checkbox"/>	Worker Name	Site	Assigned Pattern	Rotation Cycle	Days in Cycle	Effective From	Effective To				
<input type="checkbox"/>	Alvarez, Mary	Leeds	Rotating Day	2 week day/night rotation 07-04-2025	14	07-04-2025	-				
<input type="checkbox"/>	""	""	Rotating Night	2 week day/night rotation 07-04-2025	14 Offset +7	07-04-2025	-				
<input type="checkbox"/>	Bell, Matthew	Leeds	4 on 4 off	4-4 Rotation 07-04-2025	8	07-04-2025	-				

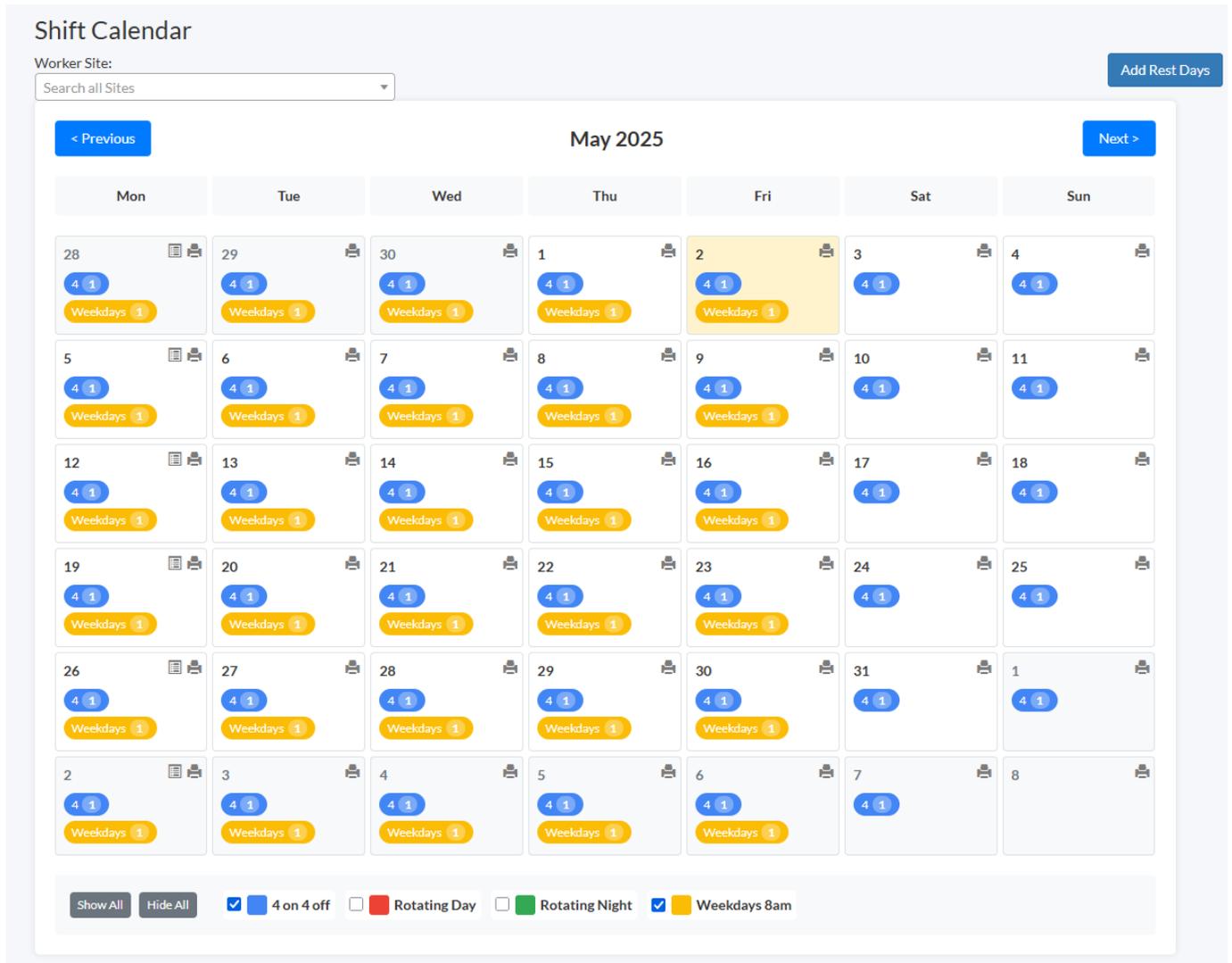
Bulk Assignments

To assign a pattern to multiple workers at once:

1. Use the checkboxes to select workers
2. Click the **Assign Pattern** button in the bulk action bar
3. Complete the bulk assignment form
4. Click **Assign Pattern**

Shift Pattern Calendar

The Shift Pattern Calendar provides a visual overview of all your assigned shifts, allowing you to easily monitor worker schedules.



Accessing the Calendar

1. Navigate to the **Calendar** tab in the main Shift Management interface
2. Select a site using the dropdown if you want to filter by location

Calendar Navigation

- Use the **Previous** and **Next** buttons to navigate between months
- The current month and year are displayed between the navigation buttons
- Each day cell shows the date and any assigned shifts for that day
- Today's date is highlighted with a yellow background

Pattern Legend

Below the calendar, you'll find the pattern legend which allows you:

- To see all shift patterns used in the current view

- To toggle the visibility of specific patterns by checking/unchecking them
- To quickly identify patterns by their assigned colours
- To use the **Show All** and **Hide All** buttons to control visibility

This is particularly useful for focusing on specific shift patterns when your calendar becomes crowded.

Viewing Shift Details

To view details for a specific day's shifts:

1. Click on any shift pattern badge within a day cell
2. A window will appear showing:
 - Date and pattern name
 - Start time and shift length
 - List of all workers assigned to this shift
3. Use the navigation buttons in the window to move between:
 - Previous/next day using the left/right arrows
 - Previous/next shift using the inner navigation buttons

Adding Rest Days

The system can automatically generate REST days for workers on their non-working days:

1. Click the **Add Rest Days** button at the top right of the calendar
2. Set the date range for generating rest days
3. Select which workers to generate rest days for (individually or using Select All)
4. Click **Add Rest Days** to process
5. The system will generate REST days for dates where workers have no assigned shifts

Rest days will appear in the worker's main Tachomaster calendar.

Coverage Templates

Coverage templates define how many workers you need for each shift pattern on each day.

Creating Templates

To create a coverage template:

1. Navigate to **Coverage > Templates**
2. Complete the template form:
 - **Template Name**: A descriptive name
 - **Description**: Optional details
 - **Site**: Which site this template applies to
 - **Effective From/To**: The date range for this template
3. Click **Create Template**

Setting Requirements

To set coverage requirements:

1. Navigate to **Coverage > Daily Requirements**
2. Select your template from the dropdown
3. Complete the requirements form:
 - **Select Pattern:** Choose the pattern to set requirements for
 - **Workers Needed:** Number of workers required
 - **Select Days:** Choose which days this requirement applies to
4. Click **Save Requirements**

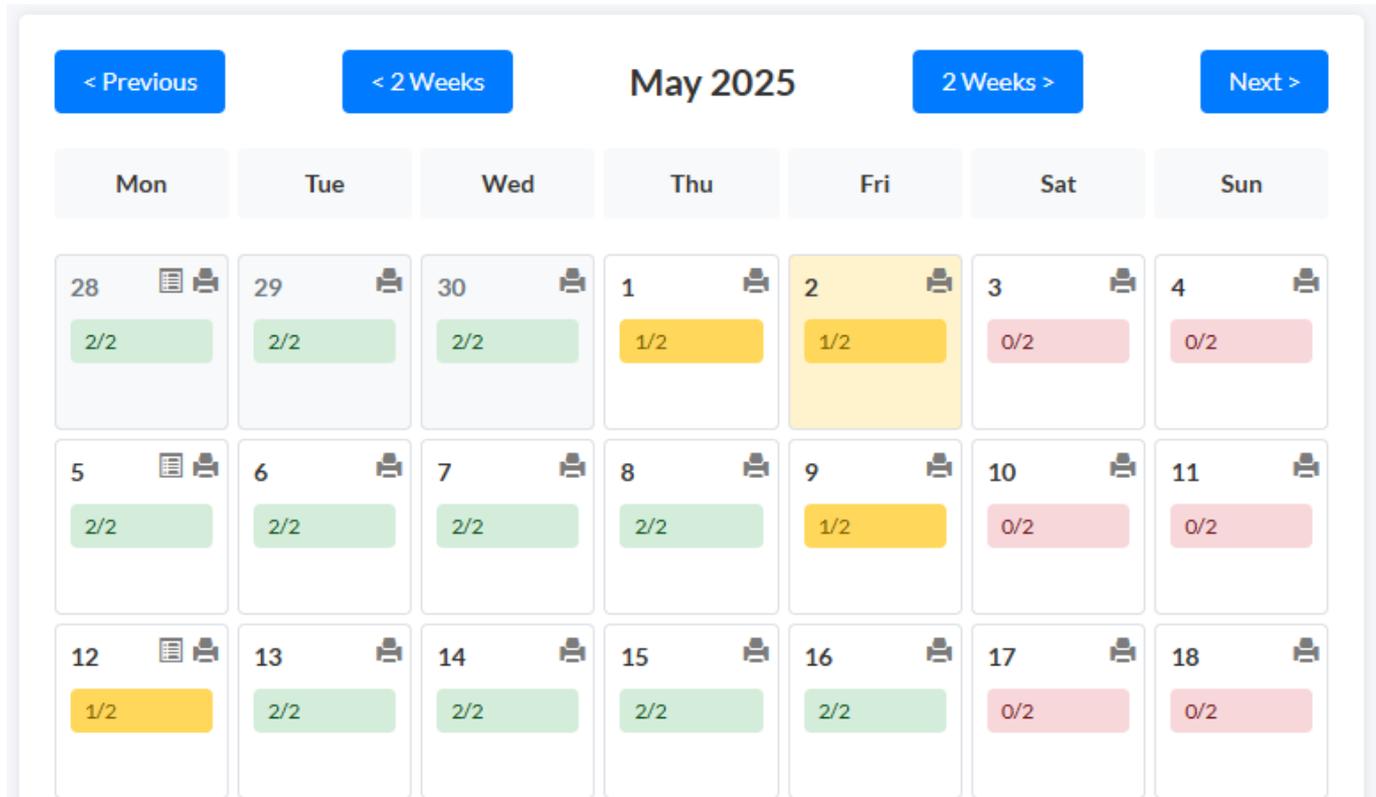
The requirements grid shows your current requirements for each day of the week.

Current Requirements

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<p>4 on 4 off 1 worker Remove</p>	<p>4 on 4 off 1 worker Remove</p>	<p>4 on 4 off 1 worker Remove</p>				
<p>Weekdays 8am 1 worker Remove</p>	<p>Weekends 1 worker Remove</p>	<p>Weekends 1 worker Remove</p>				

Coverage Calendar

The coverage calendar provides a visual overview of shift coverage.



Navigation

1. Navigate to **Coverage > Calendar**
2. Select a template from the dropdown
3. Use the navigation buttons to move between months or two-week periods

Understanding Coverage Views

The calendar displays:

- **Coverage ratio:** Shows workers assigned vs. needed for each day
- **Colour indicators:** Green (full coverage), Yellow (partial), Red (no coverage)
- **Holiday impacts:** Special icons for days affected by holidays
- **Worker absences:** Indicators for days with absent workers

Click on any day to see detailed information about shifts and coverage.

Total Coverage Required	84 worker shifts
Currently Assigned	49 worker shifts (58%)
Days with Full Coverage	17/42
Most Understaffed Pattern	4 on 4 off

Managing Coverage Overrides

To override the normal coverage requirement for a specific date:

1. Click on the day in the calendar
2. Find the shift pattern to override
3. Click **Set Override** (or **Update Override**)
4. Set the number of workers needed
5. Provide a reason for the override
6. Click **Save Override**

Finding Cover

When workers are absent or additional coverage is needed:

1. Click on the day in the calendar
2. Find the shift pattern needing cover
3. Click **Find Cover**
4. Use the search to filter available workers
5. Click **Assign Cover** next to an available worker

← Previous Day
Next Day →

Friday, 9 May 2025 ×

Daily Coverage Summary

Total Workers Needed: 2
 Total Workers Assigned: 1
 Coverage: 50%

4 on 4 off

08:00 0/1 workers Find Cover

▼

Assigned Workers (0/1)

Set Override

Weekdays 8am

08:00 1/1 workers

▼

Assigned Workers (1/1)

Lisa Johnston

Set Override

Holiday Overrides

Holiday overrides allow you to modify shift patterns for holidays and special events.

To create a holiday override:

1. Navigate to the **Holiday Overrides** tab
2. Complete the override form:

- **Pattern:** Select the pattern to override
 - **Holiday Date:** Choose the date
 - **Modified Start Time:** Optional new start time
 - **Modified Shift Length:** Optional new shift length
 - **Cancelled:** Check to cancel the shift entirely
 - **Description:** Reason for the override (e.g., "Bank Holiday")
3. Click **Save Override**

Reporting

Daily Agenda

To view or print a daily agenda:

1. Navigate to the Calendar tab
2. Click the print icon on any day
3. A PDF will open showing all shifts for that day

You can also access daily agendas from Reports > Print Day Agenda.

Weekly Agenda

To view or print a weekly agenda:

1. Navigate to the Calendar tab
2. Click the list icon on any Monday
3. A PDF will open showing all shifts for that week

You can also access weekly agendas from Reports > Print Week Agenda.

Troubleshooting

Pattern Not Appearing in Calendar

- Check the effective dates for the worker assignment
- Verify the pattern includes the day of the week you're checking
- Check for holiday overrides that might cancel the shift

Missing Workers in Assignment List

- Verify the worker is current in Tachomaster - correct start and finish dates
- Check that the worker is not marked as deleted
- Check that you have access to the worker Site and Department

Coverage Requirements Not Showing

- Confirm you've selected the correct template
- Check the template's effective dates
- Verify requirements have been set for the pattern and day

FAQ

Q: Can I have multiple patterns assigned to one worker?

A: Yes, but ensure that they don't have overlapping characteristics.

Q: How do I handle bank holidays?

A: Use the Holiday Overrides feature to modify or cancel shifts on holidays.

Q: Can I generate REST days automatically?

A: Yes, use the "Add Rest Days" button on the Calendar tab to generate rest days for non-working days.

Q: How do temporary covers work?

A: When a worker is absent, you can assign a temporary cover worker through the Coverage Calendar.

Q: What's the difference between a pattern and a cycle?

A: A pattern defines specific working days and times, while a cycle defines how patterns repeat over longer periods.