



Web Update – Driver Rotas



WHAT ARE DRIVER ROTAS?

A rota is a timetable showing when certain things are going to be done during a given period, a good example would be the rotas used in staff shift work or for school lesson times which normally has a weekly cycle.

Masternaut have introduced the concept of driver 'Rotas' (or shifts). You can now set up one or more rotas which have 7 timeslots (one for each day of the week) with start and end times for each timeslot, these times indicate the working hours for the rota.

One purpose of building rotas is to allow you to create alerts which will be sent if your drivers are using their vehicles outside of their shift hours, a new alert type has been created named "Outside shift hours".

Once a rota has been created, drivers can be added to, or removed from the rota. A driver can only be assigned to one rota at any time.



Please note, the alerts attached to this feature cannot currently be used in conjunction with Driver ID keys (Please see page 4 for more details on how the alerts work)

ADMINISTRATION OF ROTAS

The first stage of managing rotas is to create a rota template, this can be done for each different rota period. To create a rota, first **'Log In'** to the Masternaut system and select **'Administrator'** function.



Once selected, you will be presented with a number of sub-tabs, you must select **'Drivers / MCU's'**

Then select **'Rotas'** from the available sub-tabs

Drivers / MCU's

Rotas



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You will be presented with two options:

1. Add / Edit Rota
2. Rota Drivers

ADD / EDIT ROTA

To add a new rota, simply enter the name of your rota into the field titled **'Add new rota'** and then select **'Add'**

Add new rota

Maintenance Team 1

Add

You will then be presented with the following screen:

	From		To	
Monday	07	30	16	30
Tuesday	07	30	16	30
Wednesday	07	30	16	30
Thursday	07	30	16	30
Friday	07	30	16	30
Saturday	09	00	13	00
Sunday	00	00	00	00

The name of your rota is displayed in the drop down field. Select **'Delete'** to permanently delete this rota, or **'Rename'** to change the naming convention.

As shown in this example, there is the facility to enter the shift times for each day of the week using the drop down fields.

For example, if your shift times are:

Monday – Friday 07:30 – 16:30

Saturday 09:00 – 13:00

Sunday Not required

You must use the drop down boxes to specify the times next to each day.

Save

Click **'Save'** to complete the set up of a rota.

In order to edit a current rota, simply use the drop down field titled **'Select Existing Rota'**, select the name of the rota you wish to edit, you will then see the relevant times populated, make any changes and select **'Save'**



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ROTA DRIVERS

Once you have created your rota, you will need to assign drivers to them. To do this select the **'Rota Drivers'** tab....

Using the drop down field, first select your rota, you will then be presented with a list of drivers.

If drivers are already assigned to a rota, they will not be visible in this list....

To assign a driver to a rota, click on the driver's name and select  this will then move the name of the driver into the **'Assigned Drivers'** list.

Once a driver has been assigned to a rota, they cannot be assigned to another rota.

To remove a driver from a rota, highlight their name and click 

Tip: Use the shift or control key to select more than one item.

If there are no assigned drivers then the rota will not be assigned to any drivers..
The driver list will be saved automatically when you click on another function on the website.



Please note, the alerts attached to this feature cannot currently be used in conjunction with Driver ID keys (Please see page 4 for more details on how the alerts work).



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CREATING THE ALERT

A key part of the Masternaut system is proactive alerting. This guide does not detail the full functionality of the alerting suite, if you are unsure how to use this feature, please contact your Masternaut Customer Services Representative who will be happy to assist you.

If you click on the **'Security'** tab, and then **'Alerts'**, followed by **'Add/Edit'**, you will see a new alert in the drop down field called **'Outside Shift Hours'**. You will then be presented with a drop down field titled **'Select Rota'**, select the relevant rota from the drop down box and you will be presented with the details previously specified.....

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Contacts Payroll Vehicles Security Locator Performance
Routes Messaging Schedule GreenerFleet VisuLive E-Report

London C. Charge Attendance Report Location Vicinity Alerts
Live Templates Templates Add / Edit History

Step 2 - Select one or many alerts << Previous Next >>

Alert type Outside Shift Hours ?

Select Rota: Maintenance Team Shift 1

Day	From	To
Monday	07 30	16 30
Tuesday	07 30	16 30
Wednesday	07 30	16 30
Thursday	07 30	16 30
Friday	07 30	16 30
Saturday	09 00	13 00
Sunday	00 00	00 00

Save



Please note – you are unable to edit the rota times here, if you need to edit the times of your rota please refer to the section titled **'Add / Edit Rota'**

Click **'Save'** to progress to Step 3.



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Step 3 will ask you if you want to **'Apply now'** or **'Save settings to apply later'**. If you select **'Apply now'** and click **'Next'** you will be presented with the following screen:

Step 3 - What do you want to do now?

- Apply to one or many vehicles now
 Save settings to apply later

<< Previous

Next >>

Step 4 - Please select the driver(s) concerned by the alert(s)

Available Drivers		Assigned Drivers
Alex Walker		Geoff Skolnick
Amanda Port		Andrew Scully
Amina		Jonty Fish
Darren		
Dominique		
Franc 2		
fridge van		
Gary Wellsted		
Ian Moloney		
Jennifer Winn		
Jim Sutton		

In the column labelled **'Available Drivers'** are all the drivers you have assigned into this rota. To ensure the alert is live for each driver you must first place them into the **'Assigned Drivers'** column, you can do this by selecting the driver name and clicking on 

To remove them, again click on the name and select 

Tip: Use the shift or control key to select more than one item.

As with all other alerts, you can then assign a time and date in which your alerts will be live (remember, leave this blank to ensure this is always live).

Complete **Step 5** prior to the alert being live.



Please note, there is a 90 minutes tolerance around the alerts. For example if you set the shift to 07:30-16:30 the alert won't fire unless the vehicle is used before 06:00 and after 18:00. If you require the alert to be triggered immediately, you may wish to build in the 90 minute tolerance into your shift.

ALERT HISTORY

If you wish to view the alert audit trail, you must search for **'Out of authorised Hours'** in the Alert History sub tab, use the drop down field to select who the alert has been sent to, or which vehicles it relates to then select **'Search'**. This will provide a full history of alerts.

London C. Charge	Attendance Report	Location Vicinity	Alerts
Live Templates	Templates	Add / Edit	History
Type of Alert	Out of authorised hours	Sent To	-- Anybody --
Vehicles	-- All --	Alert Sent ?	Last week
			Search



If you delete a rota, all alerts templates that correspond to that rota will also be deleted, allowing you to assign a new rota to a previously assigned driver.



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SEARCHING FOR A DRIVER'S ROTA DETAILS

If you wish to establish which rota a driver belongs to, please follow these instructions:

Select '**Administrator**'



Once selected, you will be presented with a number of sub-tabs, you must select '**Drivers / MCU's**'

Drivers / MCUs

You will be presented with further sub-tabs, you must then select '**Add / Edit Driver**', this is the default view when you select the '**Drivers / MCU**' tab

Add/Edit Driver

When you select '**Add / Edit Driver**' you will be able to view a list displaying the following information:

- Driver Name
- MCU / Key
- Driver Group
- Rota Name

Driver Name ▾	MCU/Key ▾	Driver Group ▾	Rota Name	
A36F	A36F (key)	2. Operations	Maintenance Team Shift 1	
Adam Goldwater	0188 (key)	1. Sales	Maintenance Team Shift 2	
Alex Epstein - Business	2CEE (key)	6. Marketing	Maintenance Team Shift 3	
Alex Walker	AE52 MYB	1. Sales	Maintenance Team Shift 1	
Amanda Port	YG05 MFK	1. Sales	Maintenance Team Shift 1	
Amina	AMINA PDA	1. Sales	Maintenance Team Shift 1	
Andrew Scully	YG57 USB	1. Sales	Maintenance Team Shift 1	
Andrew Tillman	20 WXX	1. Sales	Maintenance Team Shift 4	
Angus Murray	F538 (key)	1. Sales	Maintenance Team Shift 1	
Angus Murray - Business	DBFF (key)	1. Sales	Maintenance Team Shift 1	
Anthony - Business	115D (key)	1. Sales	Maintenance Team Shift 1	

These details can be edited by selecting next to any name.



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Driver Name

Group

Driver has a key Driver always drives the same vehicle

Vehicle

Rota

As displayed here, the driver name can be edited as well as the group and the vehicle assigned. Masternaut recommends that changes are not made to these areas without consulting with your Masternaut Customer Services Representative.

Also shown is the name of the rota that the driver is assigned to. This can be changed by simply using the drop down menu to select a different rota.

Click 'Save' to continue, or 'Cancel' to progress without saving.

USING DRIVER ROTAS WITH HIERARCHY

As with many other areas of the Masternaut solution, this feature has been designed so it can be used with the hierarchy features. Masternaut's hierarchy has been created to ensure users can configure the system based on their organisational requirements.

If you are a hierarchy user, you will be asked to enter your rota into a hierarchy group.

Unlike many of the other hierarchy settings, users are able to view all rotas, regardless of the hierarchy they are in, as this has been designed to assist in organisation rather than security.

CREATING A ROTA

Add new rota

Select Existing Rota

Rota Hierarchy

- Head Office Test
 - Sales
 - Opps
 - Combi
- Sales Office
 - Director
 - Engineers
 - Northern
 - Southern
 - Midlands
 - Sales
 - Operations
 - Others
 - Combination
 - Marketing
 - IT

	From		To	
Monday	08	00	17	00
Tuesday	08	30	18	00
Wednesday	09	00	18	00
Thursday	08	30	17	30
Friday	08	45	15	00
Saturday	09	00	12	00
Sunday	00	00	00	00

The rota set up is essentially the same as previously detailed, however with the hierarchy enabled you can specify which area you require the rota to be assigned to – this will assist with assigning your rotas.

To assign a rota to a hierarchy, simply click the relevant hierarchy.



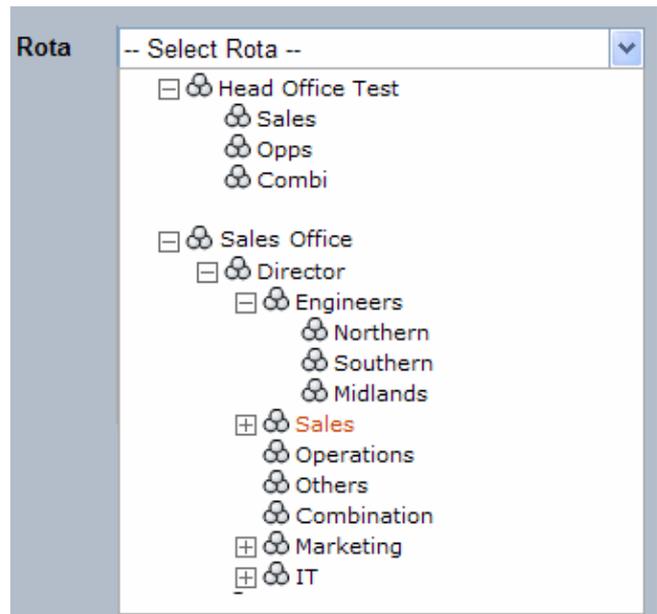
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ASSIGNING A ROTA TO A DRIVER

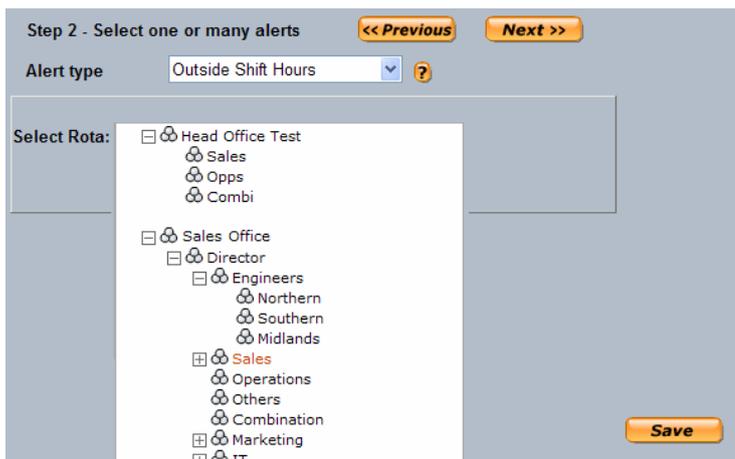
Rota Drivers

When you select '**Rota Drivers**', if you have hierarchy set up, you should select the name of the hierarchy filter the relevant alert has been filled into. In the example shown, this is in the '**Sales**' hierarchy.

Simply click on the name of the hierarchy to reveal the rotas. A list of rotas is then shown, you can then click on a rota to view (or edit) the drivers assigned to that rota.



SELECTING A ROTA FOR AN ALERT



Please follow all the steps detailed earlier in this document explaining how to create and set up a rota alert.

If you have hierarchy set up, you should select the name of the hierarchy filter the relevant alert has been filled into. In the example shown, this is in the '**Sales**' hierarchy.

Simply click on the name of the hierarchy to reveal the rotas. A list of rotas is then shown, you can then click on a rota to view (or edit) the drivers assigned to that rota. Click '**Save**' to continue.

For any assistance with these new features or any existing features please contact your Customer Service Representative on 08444 150 150.



Priory Park, Great North Road, Aberford, Leeds, LS25 3DF
Telephone: +44 (0) 8444 150 150 Fax: +44 (0) 113 281 4009 Email: info@masternaut.co.uk

www.masternaut.co.uk