What's New

October 2021

- 10/20: Released the Day View of the schedule. Click here to see the news post.
- 10/21: OIC Bulk Editors. Allows for larger changes to be made to the OICs.

August 2021

- 8/3: Displays the day of the week on the Supervision > Approvals > Open Shift screens.
- 8/3: Displays the OIC on the time off approval screen.
- 8/3: Added a new notification: when new board posts are added.
- 8/3: Added a new notification: when a time off request is canceled.
- 8/3: Added new reports: Daily Roster Grouped by Platoons Condensed and Daily Roster Grouped by Unit Condensed.
- 8/5: Option to send an alert when creating open shifts.
- 8/5: Added a drop down on the employee template screen to quickly switch between templates.

July 2021

- 7/6: Added the option to exclude certain Units and Jobs from Shift Differentials.
  - There are new settings available on the System > Settings > Payroll > Shift Differentials screen. The options are "Unit Eligibility" and "Job Eligibility".
- 7/6: Added the option to exclude certain codes from payroll exports.
- 7/7: Added a setting to sort the Timesheet PDF alphabetically or by payroll number.
  - This setting can be found on the Systems > Settings > Payroll screen, option "Timesheet - PDF Sorting".
- 7/14: Mobile to Mobile SMS
  - Agencies may sign up for an add-on text message feature under System > Settings > Mobile to Mobile SMS.
  - Read more about this new feature under the PlanIt News quicklink on the dashboard.
  - View our news article.
- 7/28: Added updates to the Loaned Equipment Feature:
  - We now offer the ability to track Inventory through the Loaned Equipment feature.
  - We now offer the ability to track individual items through Loaned Equipment with our Unique Item Tracking feature.
- 7/28: Added an option to integrate filling open shifts with lists.
  - You can now fill an open shift while viewing and affecting a List.

June 2021

- 6/15: New Time Off Setting - Confirmation Text and Checkbox
  - There is a new time off setting on the System > Settings > Time Off page.
  - This setting allows departments to enter customized text that employees must read and agree to before submitting time off requests.

May 2021
• 5/6: Multiple Shift Differentials
  • Departments may now have up to three shift differential rules instead of one

• 5/14: New Permissions
  • Standalone Shift Change Tool - Administrators can now grant access to the Shift Change Tool without granting access to the Employee Templates
  • Shift Change Tool Subordinates Only - Administrators can now grant access to the Shift Change Tool so that users have access to only change their subordinates’ templates.
  • Trade Board: Delete Posts - This permissions grants non-admins the ability to delete trade board posts.

April 2021

• 4/14: Added Autobreaks in more places.
  • Previously, autobreaks weren’t recognized in several places, such as the call off screens. PlanIt now accounts for autobreaks when marking a call off, marking time off (from any screen), and any other place an autobreak may apply.

• 4/20: Award custom number of hours for holidays
  • A minor upgrade to the holiday feature where departments can now award a custom number of automatic hours.

• 4/21: Company documents upgrade
  • There is now a "Bulk Action" option to quickly add folders for individual employees or for groups of employees.

March 2021

• 3/24: Added Self Notes
  • The Self Notes feature allows Regular Users to add notes to their own shifts through the My Schedule screen.
  • Enable the option to allow Self Note Editing under System > Settings > Schedule Settings > Self Note Editing

February 2021

• 02/04: On the Payroll > Export Hours screen, if a pay period is locked, PlanIt now shows the date and time the pay period was locked and who locked it.

• 02/23: Added Significant Dates
  • Significant Dates allows you to label and color code individual dates on your schedule.

  Previously the only option to highlight individual dates on the schedule came from holidays, and daily labels let you highlight dates in a rotating pattern.

  With significant dates, you can now choose the color in which the day is highlighted and customize the text for that significant date.

  **Adding a Significant Date**

  You can add the significant date under Scheduling > Editors > Significant Dates.

  You can also add significant dates when creating a holiday. When you create a new holiday, you will now see a box that allows you to automatically create a significant date based on the holiday date.

  **Customizing your text and colors**

  You can customize the text that displays on a Significant Date.

  You may also customize how your date is highlighted. On the System > Settings > Scheduling > Universal Setting screen, there is an option for the color coding to affect just the heading or both the heading and the entire date.

  If your department has daily labels set up, the color coding on significant dates overrides the daily label, but the text will appear above the daily label; both the daily label and significant date text are displayed.

  View our Knowledge Base article for more information on Significant Dates.

  Configuring Significant Dates

December 2020

• 12/08: Fixed an issue where disabling open shifts on the schedule option screen did not disable Special Event open shifts.
• 12/09: Added a warning to the time off submission and approval screen that indicates if the times on the request itself overlaps.

• 12/10: Added a BS&A specific payroll export. Added the corresponding BS&A Export Settings screen.

• 12/10: Added a SafeChoice specific payroll export. Added the corresponding SafeChoice Setting screen.

• 12/11: Added an iSolved specific payroll export. Added the corresponding iSolved Setting screen.

• 12/14: Added support to payroll export files to choose a separate code for Time Off Subbanks.

• 12/15: Added support to payroll export files to allow for different Shift Differential and OT Shift Differential codes to be applied to different employees.

• 12/15: Added a New England Municipal Resource Center specific payroll export. Added the corresponding NEMRC Setting screen.

• 12/16: Released several new Trade Board settings that allow administrators to disable certain types of Trade Board posts.

• 12/16: Added several small improvements to make user experience more consistent:
  • Changed action buttons to be a Modify drop down on several screens.
  • Dynamic columns on several screens - Our goal is to make these pages cleaner when the option for a setting is the same across all entries
  • Changed Icons to give users a more consistent experience.
  • The changes where applied to the following screens:
    • System > General > Labor Departments
    • System > General > Jobs
    • System > General > Units
    • System > General > User Roles
    • System > General > Stations

• 12/18: Added a notification when custom forms are passed to a second approver.

November 2020

• 11/01: Added a Naviline specific payroll export. Added the corresponding Naviline setting screen.

• 11/01: Added the ability to add descriptions to IP addresses on the Time Clock setting screen.

• 11/03: Added a Paychex specific payroll export. Added the corresponding Paychex setting screen.

• 11/11: Removed intermediary screens to add images. You will no longer be brought to a separate page for images. Add images through a pop up.

• 11/11: Fixed an issue where users could approve their own time off when the department's security settings indicated that self-approvals were restricted, but the user was marked as a final approver.

• 11/11: Added an Edmunds Govtech specific payroll export. Added the corresponding Edmunds setting screen.

• 11/12: Added several small improvements:
  • Filter on the Court Appearance screen - When adding Court Appearances (Scheduling > Editors > Court Appearances), users may now filter the list of employees to more quickly find an employee on the list.
  • Add another time off bank checkbox - On the Add New Time Off Banks screen (Time Off > Setup > Banks), when adding new banks, there is now an "Add another time off bank" checkbox that allows you to create several banks without being brought to the setting screen after creating each one.
  • Shift Change Tool / Schedule Revisor Wizard - When employees' templates are adjusted on the Scheduling > Templates > Employee Templates > Shift Change Tool screen, users now have the option to proceed directly to the Schedule Revisor screen with the employees' names populated.
  • Dynamic columns on several screens - Our goal is to make these pages cleaner when the option for a setting is the same across all entries
    • Time Off Banks
    • Overtime Codes
    • Overtime Categories
    • Certification Types

• 11/17: On the Open Shift Review screen (Supervision > Approvals > Open Shifts > Review), added requested hours to reduce confusion if someone requests a partial shift.

October 2020

• 10/12: Added ADP settings screen that gives ADP users more options for payroll export configuration.

• 10/15: Provided a user facing Shift Differential setting screen. Users can now set up simple shift differentials for their department without contacting PlanIt Support.
• 10/21: Added a Munis specific payroll export. Added the corresponding Munis setting screen.
• 10/23: Added a Caselle specific payroll export. Added the corresponding Caselle setting screen.
• 10/26: Added payroll setting on Payroll Settings screen called Combine Consecutive Entries.
• 10/27: Added a Paycom specific payroll export. Added the corresponding Paycom setting screen.

September 2020
• 9/4: Added settings for both Overtime and Time Off that takes away the option to Delete entries.
• 9/24: Updated Payroll Holidays
  ▪ Read our Knowledge Base article on Configuring Holidays
  ▪ Watch our Video on Creating Holidays

August 2020
• 8/20: Fixed an issue that caused open shift requests made through clicking on push notifications to show incorrectly in several places.
• 8/20: Added a setting to make the time off description mandatory. Added a setting to make the call off notes mandatory.
• 8/20: Removed the OT setting that prevented normal users from choosing an OT code. It was not connected to anything.

July 2020
• 7/6: Default labor departments - If there are multiple labor departments, you now must choose the default labor department.
• 7/9: Custom Form Signatures - Users can now request that other users sign their custom forms.

June 2020
• 6/1: Posted a warning on IE letting clients know that we are no longer continuing support for this browser. If something does not work in IE, we will not fix. This is because Microsoft has stopped updating and support IE. We recommend that users use one of the other major browsers such as Google Chrome, Firefox, Safari, or Edge.
• 6/19: Fluid Start Date - Employees can now choose the start day of the week on The Schedule and the My Schedule pages
• General: Enforced more security on passwords. Force users to change passwords when they first sign in. Prevent most commonly used passwords.
• General: Added several reports
  ▪ Medical Information
  ▪ Employee Login History
  ▪ Email Outbox Report
  ▪ OT Totals Reports
  ▪ Time Off Used Totals By Employee
  ▪ Time Off Request Log with Notes
  ▪ Time Off Cash Out By Employee

May 2020
• 5/14: New Report: OT: Totals By Code Grouped By Employee (Hours Only + Paid Compensation Only)
April 2020

- 4/1: Timesheet Signatures
- 4/1: Custom Forms
- 4/1: Web-based Time Clock

Reports:
- Emergency Contacts

Below is the full news post for April 2020:

**Web-Based Time Clock**

In an effort to give PlanIt users more flexibility in recording punches, we released an update to our Time Clock feature that makes it accessible through web browsers and the mobile app.

**New Web Based Settings**

Your department can choose whether or not to enable this update. You can find the option to enable the setting under System > Settings > Timeclock.

Once you enable the web based timeclock, you can configure additional options.

**Authorizing Employees**

Limit which employees can record punches from the web browser timeclock. If an employee is not included on the list, they will still be able to record punches from your department's designated timeclock desktop. They will not be able to record punches from their own desktop or mobile device.

**Authorizing IP Addresses**

By authorizing certain IP addresses, you can allow employees to record punches on their personal devices, but also restrict the locations from which they can record punches. For example, you can set the IP address to your department's IP address, so employees must be physically at your department and connected to the network in order to record a punch from their device.

Authorizing IP addresses dictates that employees must be connected to a certain network before recording a punch. If they are outside of the network, they will receive a message letting them know they are not connected to the correct network.

**Custom Forms**

PlanIt has released a feature that allows departments to create customized forms, set up workflows for individual form types, and run reports on the data.

**Creating Forms**

Departments can create as many custom forms as needed.

Add an icon to a form to make it stand out as unique to your employees.

For each form, permissions can be set to give different levels of access to users. Set who can submit forms, who can view the content of submissions for all employees, if employees can digitally sign forms, and who can approve forms.

Submitting Forms will be accessible through the My Information menu, or from the dashboard if this option is enabled.

**Workflows**

Get notified when users submit a form, or set up an approval process for each form.

If you choose to get notified for a form, you can set who will be notified. You can also set up a conditional notification. For example, users can only get notified when a field has a particular value.
You can require forms to be approved before it is accepted. If you choose this option, you can designate who can approve a form, and you can set up a tiered approval process.

**Run Reports**

If you are marked as having View permissions on a form, you are able to run reports on submitted information. Under Supervision > Forms, choose the form you want to export. There is an export tab at the top of the screen. Choose the date range for which you want to export information.

The reports open up in excel. Use Excel's tools to filter or sort the information on this report if needed.

**Digital Timesheet Signatures**

Departments can now enable employees to digitally sign their timesheets. Employees can sign by using a mouse or a finger if they have a touch screen device.

To enable this setting, administrators can go to System > Settings > Payroll Settings and scroll to the option "Timesheet - Employee Verification". Choose the option "Prompt employees for verification with a digital signature" and save your changes.

Upon their next login, users will have the option to digitally sign their timesheets on their My Information > Schedules > Timesheets screen. They can Verify their timesheets as usual, but there will be an additional option to sign.

When printing out the timesheets, if an employee line was included (set in Payroll Setting "Timesheet - Printing Signature Lines"), the employee's digital signature shows on the timesheet along with the date. If a supervisor's signature line is included, it will remain blank so that a supervisor may physically sign the form.

**February 2020**

**Day Editor**

**Day Editor Views**

The Employee view allows you to view one employee at a time. You may drag and drop their shift to edit their hours, or to move them to Time Off or Called Off. You can view Overtime and Court Appearances for the employee, but you can not drag and drop the bars to these sections.

The Unit view allows you to view one Unit at a time. Under each Unit, you can see shifts separated by Job type. On the top bars, you are able to see the staffing requirements per hour per Job type. You can drag and drop shifts between Job types.

The Job view allows you to view one Job at a time. Under each Job, you can see shifts separated by Unit type. On the top bars, you are able to see the staffing requirements per hour per Unit. You can drag and drop shifts between Units types.

**Editing Shifts**

Manipulate your schedule by dragging and dropping existing shifts to different hours or categories, or by double clicking or right clicking on shifts to make additional edits.

On most views, you are able to convert a shift to Time Off, mark a shift as Call Off, Split Up a Shift, or Delete it.

You can fill or edit Open Shifts on the Day Editor. You may fill Open Shifts manually, by using an integrated list, by seeing who is available, or randomly.

**Viewing Staffing Requirements**

This editor gives a quick overview of requirements of a specific job type on a specific unit.

For Staffing Level units, the bar with the job type displays the current number of employees on the schedule as well as the required number of employees. The first number indicates the number of people on the schedule, and the second number indicates the number of employees needed. The bar is color coded: red means understaffed, green means you meet your requirements, yellow means you exceed requirements.

When you add an open shift onto the schedule, the second number increases because you require more people on the schedule.

For Special Event units, the openings are displayed as bars that say “Unfilled”.

**Warnings**

The warnings system can be configured to run the following checks:

Overstaffed, Understaffed, Overlap Detection, Qualified for Shift, Certified for Shift, Availability Violations, Mandatory Rest, Over Weekly Hours, and Under Weekly Hours.
Warnings can be accessed currently in two ways.

- The Day Editor will automatically check the schedule as you work and warn you of any possible issues.
- You can search for potential issues using the Warnings page found in the Scheduling menu, Tools and then Warnings.

In the future, we plan to add the warnings checks to more schedule editors like the Calendar Editor.

You may configure which warnings you want your agency to check for when scheduling by configuring the settings under System > Settings > Warnings.

When directly searching for warnings using the Scheduling -> Warnings page you will be presented each time with your agency’s default warnings configuration. You may override it while searching for issues and this will not impact other users of PlanIt.

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**January 2020**

- Half of all Settings pages updated to provide better and more consistent user experience.
- Inconsistencies in holidays shown on the schedule and platoon scheduled were resolved.
- The Open Shift Command Center now displays seconds to determine which request came first.
- Company courses now warns employees if the survey is skipped.
- Resolved differences in sorting in some views between the schedule and calendar editor.
- Added an accrual review system for new accrual setups.
- The report Open Shift List now includes historical open shifts.
- **New Reports:**
  - Employee Field Excel File
  - Calendar - Approved & Pending Time Off
  - Calendar - Pending Time Off

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**December 2019**

**Availability Reporter Improvement**

- Added hour, half hour, and quarter hour reporting options
- Selectable hour ranges
- Improved interface

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**November 2019**

Added an option to sort Platoons when creating future moves.

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**October 2019**

- Employee verification of timesheets can now be shown on the timesheet export file.
- Payroll Employee Batches are now available for all agencies.
- Trade History page will now show trade board posts.
- **New Settings for Payroll Export File Hourbreakdown 3**
  - Option to include fixed columns rather than dynamic columns.
  - Option to set the order of each column in the export file.
- **New Setting for Daily Label Background Coloring**
  - Can pick full day coloring or just background of header.
• Shift Diff Report Exclude Units / OT Codes
  • Can set option per unit to exclude from shift diff report.
  • Can set option per ot code to exclude from shift diff report.

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**September 2019**

We added some settings that will make manipulating payroll much easier!

- **New Settings for Payroll Export File Shift Detail**
  - Option to add any of the 10 custom employee fields into the export file.
  - Option to use the Special Export Code for Time Off Banks
  - Option to use the Special Export Code for OT Codes
  - If we detect any time off code, bank, or shift code with a comma in it, an extra column is added to fix columns lining up.

- Payroll start screen will remember the last pay period you visited while logged in.

- **New Payroll Setting:** For agencies that pay two weeks and calculate OT as anything scheduled over 80 hours instead of 40 each week.

**New Report Added**

- Court Appearances By Acknowledge Date - This report allows you to run a search on court appearances acknowledged within a certain date range.

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**June 2019**

We are pleased to announce an update to the Vehicle Checklist Designer feature. This update will increase the functionality and ease of access in regard to checklists.

**Accessibility and Format**

Previously, the Checklist Designer was only available from the desktop application version of PlanIt. With this update, the Designer is available when accessing PlanIt from a web browser or mobile application. You can still access it by going to System > Vehicle Setup.

As part of the initiative to make the Designer more easy to use, you will also notice that its interface more closely resembles other screens in PlanIt. In addition, the Designer no longer opens a secondary window as before, but takes you to a self-contained page within PlanIt.

**Multiple Checklists**

Before the update, the Vehicle Checklist feature was limited to one common checklist which was implemented for all vehicles. You can now create multiple Vehicle Checklists which can have vehicles assigned to them. Each vehicle can only be assigned to one checklist at a time, but each checklist can have as many vehicles assigned to it as necessary.

We are excited to roll out this new feature to you, and hope that it makes designing your checklists efficient and useful!


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**May 2019**

In an effort to offer a more consistent user experience and include all pages in our web version, PlanIt is pleased to announce web based Unit Template and Staffing Requirement pages.

**Unit Templates**

The new Unit Templates page offers 2 views where you can adjust the pattern of your minimum staffing requirements:

The Text Editor update offers easy-to-read descriptions of a Unit’s minimum requirements. The description includes the number and type of employees you require on a Unit on a day of the week, and the hours where you require them. This screen allows you to quickly add, edit, and copy requirements to different days of the week.
The Visual Editor shows a grid that depicts your staffing requirements for specific hours during a day of the week. This screen allows you to click on blocks of time where you need minimum staffing requirements to exist. You can drag your mouse across the grid to quickly add your requirements.

To find out more about using the new Unit Template screen, visit our Knowledge Base article or watch our video on Unit Templates.

Knowledge Base Article: http://help.planitschedule.com/display/KNOW/Unit+Templates+and+Adding+Minimum+Staffing+Requirements

Video: http://help.planitschedule.com/display/KNOW/Video++Unit+Templates

Staffing Requirements

The Staffing Requirements page also includes a Text Editor and Visual Editor. The Staffing Requirements page controls staffing levels on a day-to-day basis. Although you can add Open Shifts on the Calendar Editor, you can get a visual of your Staffing Requirements on this page and add more if needed. A calendar on this screen allows you to choose the dates you want to view or edit.

To learn more about the Staffing Requirements screen, visit our Knowledge Base article.

To use the Text Editor: http://help.planitschedule.com/display/KNOW/Staffing+Requirements++Using+the+Text+Editor
To use the Visual Editor: http://help.planitschedule.com/display/KNOW/Staffing+Requirements++Using+the+Visual+Editor

This update paves the way for us to discontinue the requirement of a desktop application. For many departments, installing or updating the application requires getting their IT team involved. With this change, new content and updates will be immediately available to all users through the web without any need for updates on your end.

March 2019

Lists (BETA)

PlanIt Schedule is pleased to announce the beta version of our new Lists feature.

Departments can set up Lists to define the order of employees in certain situations. This feature allows you to create customized lists and order employees.

Administrators have access to create, manipulate, and configure settings for lists under the Users drop down. Power Users and anyone who has permission can access lists and view changes from the Supervision drop down. Finally, all users can view list changes and information from the My Information dropdown under Overviews. There are permissions that you can set to limit the amount of information users can see on these screens.

Any change made to a list is tracked and recorded.

You can create 3 types of lists:

- A Fixed list, which gives you a list that remains in the same order from day to day. This list can only be changed from the administration screen, and is best used for seniority.
- A Position list, where employees can be moved up and down the list. The order can be changed in several places: by administrators on the Lists screen under the Users menu, from the Supervision screen by power users and anyone else with permission, or, if the settings are configured, when someone fills a shift.
- A Points list, where you can assign points to employees. The list ranks all employees according to points. Points can be manipulated by administrations under the Users menu, from the Supervision screen by adding or deducting points, or, if the settings are configured, when someone fills a shift. This list would be useful for offered hours.

For an overview of Lists, view our Getting Started with Lists video:

Visit our Knowledge Base for a more in depth explanation of Lists and their settings.

Open Shift Command Center

There are several new options on the Open Shift Command Center screen that help you fill open shifts:

- Manually fill the shift as you would on the calendar editor screen. You can manually choose an employee from the drop down, and after making sure all of the information is correct, you can click Fill Shift.
• Fill the shift based on a list. As long as you have the integration enabled for this particular list, you can select it from the drop down. Once you choose, you can see everyone on the list in their specific order. Select the employee who will fill the shift. As long as the settings are configured, the list will be reordered.
• Fill the shift based on those who have marked themselves as available on the availability screen. This is useful for part time employees. You can check this box at the top to filter the list down to employees who are qualified for this job type.
• Fill shifts randomly BETA. To enable the random option, go to system > settings > open Shifts > and enable the randomizer tool. Back on the Open Shift Command Center screen, you can filter by group and then fill the shift based off a random suggestion.
• Approve people who volunteered for this shift.

Watch this video for an explanation of our Open Shift Command Center:

About BETA Versions:

Sometimes we will release new features as beta as we continue to enhance and further integrate the feature within PlanIt. Beta versions may include bugs during the initial release. We invite you to try and use beta versions as you see fit. Please report any issues or suggestions you may have when using the beta version via a support ticket. The best way to send a support ticket is through the Help menu in your PlanIt program. We will make an announcement when the feature is no longer in beta.

Cancel Option for Court Appearances

We have added an additional status for Court Appearances. You can now cancel them in addition to deleting.

View our Knowledge Base article for more information on how to do this:

Cancelling or Deleting Court Appearances

Overtime Approval Checks

The Overtime Approval screen now provides you with additional checks to ensure that your payroll will be processed correctly.

These checks include Scheduled Shifts, Mismatched Hours, and Previously Decline Review.

January 2019

For the new year we’ve added nine new tools to make big changes more efficient. Here’s a quick breakdown of those new tools:

Shift Creator

(Found in the Scheduling Menu, under Editors, then Bulk Editors)

The new shift creator tool is perfect for adding multiple shifts for a single employee, a single shift for multiple employees, or even multiple shifts for multiple employees. You’ll select from a list of employees or groups, enter basic shift details, and then enter the dates of the new shift. All the resulting new shifts will be created instantly and in a single action.

For More Information: http://help.planitschedule.com/display/KNOW/Shift+Creator+Bulk+Scheduling+Tool

Shift Editor

(Found in the Scheduling Menu, under Editors, then Bulk Editors)

With the Shift Editor tool, the focus is making fast and easy changes to existing shifts over large periods of time. You’ll start with a filter screen to identify what types of shifts you wish to modify. Then you check the shifts you wish to update. On the final screen you’ll be able to select how you wish to modify the shifts from at least one of the following fields: Date, Start Time, End Time, Employee, Job, Unit, Label, Payroll Exclusion, and Note. Once configured, all of the shifts will be updated at once.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Shift+Editor

Shift Remover

(Found in the Scheduling Menu, under Editors, then Bulk Editors)

The purpose of the shift remover is simply to remove a large number of shifts at once. You’ll start with the same filter screens as Shift Editor to identify which shifts you wish to remove. Once you have them selected you only need to confirm the action. All selected shifts will be removed from the schedule.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Shift+Remover
Mirror Shifts
(Found in the Scheduling Menu, under Editors, then Bulk Editors)

The mirror shifts tool is perfect for situations where one or many employees need to follow the schedules of other employees, particularly in training situations. First, you’ll set up your “Destination Employees”. These are the employees whose schedule will be updated. Next, you’ll be able to define how the new shifts will differ (if at all) from the shifts of the co-workers they are mirroring. For example, you may want to put a note on all of the new shifts indicating they are in field training. Finally, you’ll select the “Source Employees” from whom the schedules will be copied. You’ll get to pick multiple sources if necessary, along with date ranges. Once completed, the new shifts will be automatically added for the chosen Destination Employees.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Mirror+Shifts

Shift / Time Off Converter
(Found in the Scheduling Menu, under Editors, then Bulk Editors)

The purpose of this tool is to change existing shifts to time off, or existing time off back to shifts. You’ll start with a filter screen to identify what types of shifts you wish to modify, as well as what type of conversion you wish to make. Then you’ll check which shifts or time off will be converted. On the final screen, you’ll be able to select how the new shift or time off will be configured. After that, all the selected shifts will be converted to time off, or the selected time off will be converted to shifts.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Shift+to+Time+Off+Editor

Time Off Creator
(Found in the Scheduling Menu, under Editors, then Bulk Editors)

The time off creator is similar to the shift creator tool but is for adding multiple time off entries for a single employee, a single time off entry for multiple employees, or multiple time off entries for multiple employees. You’ll select from a list of employees or groups, enter basic time off details, and then enter the dates of the new time off. All the resulting new time off entries will be created instantly and in a single action. This tool could be perfect for giving employees off for administrative holidays all at once.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Time+Off+Creator

Day Note Editor
(Found in the Scheduling Menu, under Editors, then Bulk Editors)

The day note editor is the fast way to update the note that can appear at the top of the schedule for each date. Provide it with a date range, and you’ll have a text box for every date within that range. If the same note is repeated across multiple dates, you can use the copy note field to enter it once and copy it to multiple dates. You may also use this to clear existing notes added to the schedule.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Day+Note+Editor

Bulk Punch Creator
(Found in the Supervision Menu, under Time Clock, then Bulk Punch Creator)

If your agency uses the time clock and you find yourself in a situation where you need to add paid time to multiple employees’ punch records, this is your tool. It’s even useful for updating a single employee’s punch records if multiple days were missed. You’ll select which employees, the punch details, and finally, the dates on which the punches occurred. The punches will be entered into their punch records just as if you had used the time clock editor to add each punch one at a time.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Punch+Creator

Bulk Employee Editor
(Found in the Users Menu, under Employee Management, then Bulk Editor)

The Bulk Employee Editor tool is the fast way to update employee accounts. To start, you’ll narrow down which employees you would like to modify, and up to 5 of 40+ fields to modify at once. The tool will then present those employees with each of the five fields so that you may quickly modify the fields in a list view. Each change is saved automatically without needing to leave the page. If you need to update multiple employees with the same change, a mass update tool is available to update any employee you check at once.

For More Information: http://help.planitschedule.com/display/KNOW/Bulk+Employee+Editor

On a final note, if you use the “Shift Note Editor” tool to update shift notes on a single page, that tool has been moved with the other Bulk Editors under Scheduling menu, then Bulk Editors.
December 2018

Major Kiosk Update:

New Slide Types

Previously, you were limited to two slide choices: an employee list or an external web page. We've added 8 new slide types to give you more options:

- Platoon
- Employee Group
- Court Appearances
- OIC
- Time Off
- Units
- Job Types
- Custom Text

Platoon Slides and Employee Group Slides

These two slide types will automatically populate from the list of employees who belong to the employee group or platoon. You will no longer need to manage the list separately within your kiosk. It will update itself as you update the group or platoon. These slides work like the employee list and will display employee shifts, time off, and court appearances.

Court Appearances, OIC, and Time Off Slides

These slide types will show just these special types of entries from your schedule. If you would like a slide that only shows who is off for a certain day, or who has a court appearance, or your OIC schedule, these slide types will provide that by focusing solely on those types of entries.

Units and Job Types Slides

These slides focus on particular units or job types rather than the employees working them. For example, if you had an Extra Duty unit and wanted to show all shifts scheduled to that unit for a week, you would create an Extra Duty Unit slide. This will only display shifts for that unit and will not display any time off or court appearances.

Custom Text Slides

The final new type of slide is a custom text slide. Much like the announcements, you can enter and post it directly to the kiosk.

Style Update

We've updated the kiosk to match the scheduling screens in terms of how shifts are displayed. We've also made sure that all information available on the scheduling screen is also optionally available on the kiosk. This includes shift notes, daily notes, paid/unpaid indicators, overtime forms, shift labels, daily labels, and more court appearance information. Additionally, we've added:

Color Coding

You have complete control over how color coding works on your kiosk. We have provided a list of all the different types of color coding available, and you can enable them individually and sort by priority to determine your preferred color coding.

Font Size Options

You can now control how large or small the font is for the kiosk or individual slides. We've provided 7 font size choices from extra-extra-small to extra-extra-large. If you have one particularly large slide you can modify just the font size for that individual slide so more content fits on the screen.

Date Range

Previously, the kiosk displayed the next 7 days by default. You can now control how many days are shown (up to 7), or if you would prefer, a fixed week view where the kiosk always shows the first day of your work week.

Interactions
You can still interact with the kiosk by viewing future schedules but you can use it to submit forms.

**Time Off Requests**

We still provide the ability to enter time off requests directly on the schedule. We have updated the request form to ensure it matches exactly with the most recent version of the form. We have dropped a rarely used feature where the username and password was not required to enter a time off form. We could not provide access unauthenticated to the newest version.

**Overtime Forms**

Employees may now enter overtime forms directly from the digital staffing board just like time off requests. They will need to enter their username and password and then will be shown the latest overtime form with all of your configurations.

**Your Next Steps**

If you already have a kiosk up and running there is nothing you need to do immediately. We've transferred all of your settings over to the new kiosk system. Your existing kiosks are already showing the new styles. We've matched all of your settings so that they are nearly identical to what you were previously displaying.

When you are ready to begin using any of these new features or to create your first kiosk, simply go to the System menu, Computer Setup, and then Kiosks. The old kiosk configuration screens have been replaced with the new settings. You can modify your existing kiosk to add new features or create a new kiosk if you've never done it before.

You do not need to do anything to your existing kiosk computers themselves. The kiosk computers have already upgraded and moved to the new system several weeks ago without any of the new features. The new features were officially added this week and are now available if you choose to use them.

Finally, we would like to wish everyone a safe and happy holidays from the PlanIt Scheduling team! We really appreciate your continued business and would like to thank all of you for your diligent efforts in keeping everyone safe, healthy and secure, especially during the holiday season.

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**October 2018**

- Mobile Application officially released!
- Release of an F-Score Accounting Page
- Label changes are noted in Shift Change notification emails or text messages.

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**September 2018**

*We released a ton of small feature requests in September! Take a look at "What's New" and read our Knowledge Base articles to find out more!*

- Added Day Labels
- Released a Text-to-Speech feature in Voice Blasts
- Allows signatures when printing out time sheets.
- On reports, we now display the Time Off bank name rather than "PTO". We display the bank name unless the bank name is hidden.
- Added several new Vehicle Checklist Reports.
- When approving Overtime, PlanIt will warn you if there is already another Overtime form approved for the same date and time.
- New Settings for Vehicle Checklists.
- View Court Appearances on Overtime Approval screen.
**August 2018**

View the articles below to learn more about the new features!

**Self Scheduling**

- If you need to give normal level users access to enter themselves on the schedule, use this feature to give them access to schedule certain shifts.

*View our Knowledge Base articles here:*

- Configuring Self-Scheduling Settings
- Using the Self-Scheduling Screen

**Signature Lines on Time Sheets**

- On the PDF Report that lists your employees timesheets, you can add a signature line for your employees and/or supervisors to physically sign the timesheets.

*View our Knowledge Base article here:*

- Adding Signature Lines to Time Sheets

**Text To Speech Options with Voice Blasts**

- Type out a Voice Blast message rather than recording one! We now support a Voice Blast Text-To-Speech feature.

*View our Knowledge Base article here:*

- Use Text-To-Speech in Voice Blast

**Sorting the Schedule by Job Types**

- Use this setting to designate the order of Job Types listed on your schedule.

*View our Knowledge Base article here:*

- Schedule Settings - Sorting by Job Type

**Adding Day Labels and Color Codes to Days**

- You can now label days and set color coding that follows a particular pattern. This feature is commonly used by agencies that implement a 24 or 12 hour schedule. If there is a pattern followed every few days, departments may want to color code and label the day so employees can more easily see when they are working.

*View our Knowledge Base articles here:*

- Adding Day Labels and Color Codes to Days

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**May 2018**

We are pleased to announce the release of the new PlanIt interface!

We have compiled a list of what's changed.

Here is what you need to know!

**Interface**
• Mobile-friendly and Responsive Interface
  • We've updated our interface to look nicer when you're working from your mobile devices. Navigation should be easier and allow you to smoothly perform functions.

• Menus are now organized in alphabetical order

Adjusted Features

• Boards replace Walls - We have renamed this feature
• Employee Journals replace Employee Walls - We have renamed this feature and have moved it under the Supervision drop down
• Documents replaces Company Documents and Company Documents Management - We have combined these two screens and renamed this feature.

Enhancements

• Hide, Delete, and Restore Users
  • Inactive has changed to Delete
  • When you Delete a User, you can choose to Permanently Hide Users or Restore them

• Email Blast Attachments
  • You may now attach files to your Email Blasts

• Customizable Boards
  • Previously, all departments had pre-set boards with standard permissions. You may now customize your boards, add more boards, and select permissions on your boards.

• Shift Trades
  • Administrators may now perform trades on behalf of two employees
  • You may now set up a multi-tiered review process.
  • Employees may now send shift trade requests to specific supervisors

• Calendar Editor Split Up Shifts
  • On the Calendar Editor, you may now click on a person's shift to "Split Up" a shift. This might be useful if you need to send an employee to a training or meeting in the middle of their shift.

• Shift Labels
  • Under System > Settings, you may now create Labels for shifts. Use Labels if there is a note or identifier for a shift that happens frequently.

• Company Documents Access Logs
  • Administrators may now view access logs for all documents. This will tell you who viewed the documents and when.