

# Introduction

This document is an introduction to the Scheduling Workbench window and the material presented aims to familiarise you with the available operations on the Scheduling Workbench.

Rostering involves placing suitably experienced employees in locations to work specific shifts across a period whether it is a day, week, fortnight or month.

The core component of PowerForce is the Rostering application, and in this section we make an introduction to the main screen through which the day to day roosting functions are carried out.

The terms roosting and scheduling are used interchangeably, and mean the same thing.

The terms roosting locations, clients and outlets are used interchangeably, and mean the same thing.

Your system will have been set up, so that upon logon your default screen will look similar to Figure 1.

**Please Note:** This is one possible menu layout. The manner in which menus are laid out is a function on the implementation of your PowerForce system.



Figure 1 - A typical menu layout

What the screen (Figure 1) shows is the options that have been made available to your specific logon.

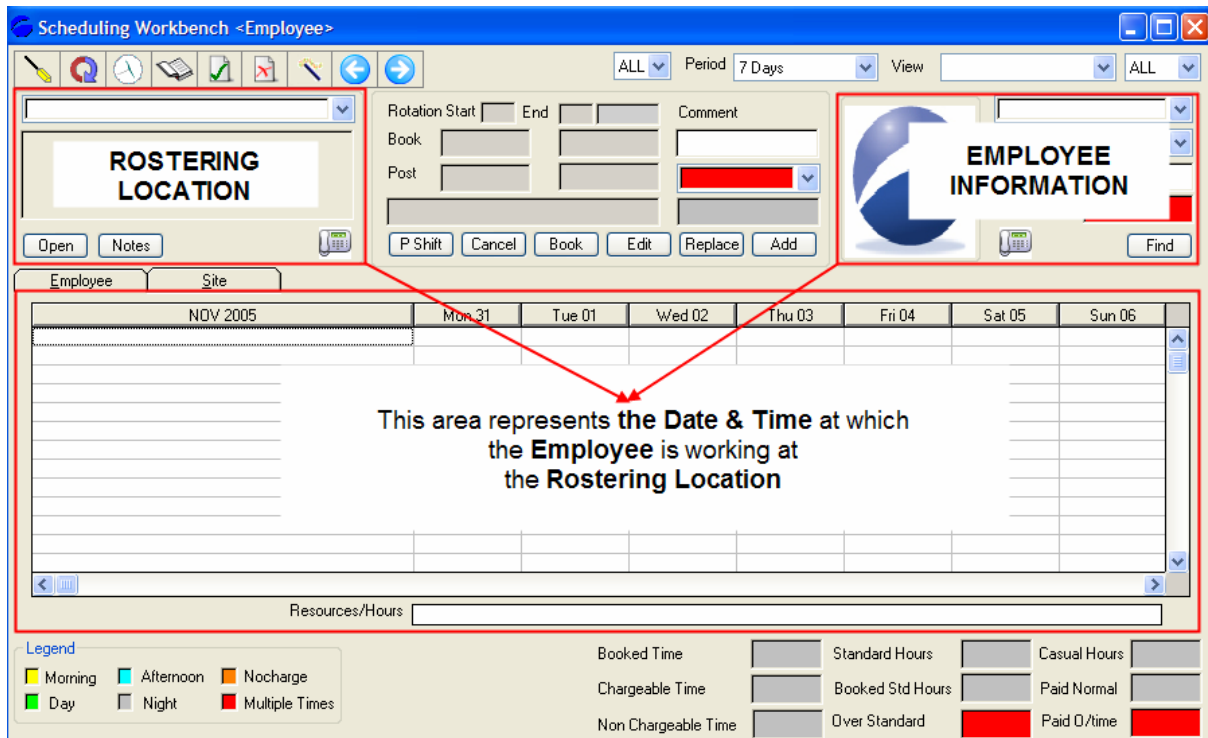


Figure 2 - The main rostering screen

As shown in Figure 2, there are 3 main sections to the rostering screen.

**Rostering Location** – you can only process (manage) one rostering location at a time, therefore you would select it from your available rostering locations.

**Employee Information** – in this area you work with your available employees. The selection of employees which is presented to you is representative of the employees that you have been allocated (generally configured by your system administrator) to manage.

All employees in the system have just the one default cost centre (which equates to rostering location), and so in the circumstance of where an employee is eligible to work at multiple locations, the employee record will have to be marked to indicate that this employee has the ability/ availability / skills to work at other locations.

**Main Grid** – this is where the Rostering location and the Employee come together. As you can see, the grid is date driven, and the details here (as we'll show in a moment) represent the shift details on a per employee per day basis.

It's in this grid that all the day to day rostering functions are carried out. Shifts are changed, approved, made, and deleted based on the details on the Scheduling Workbench.

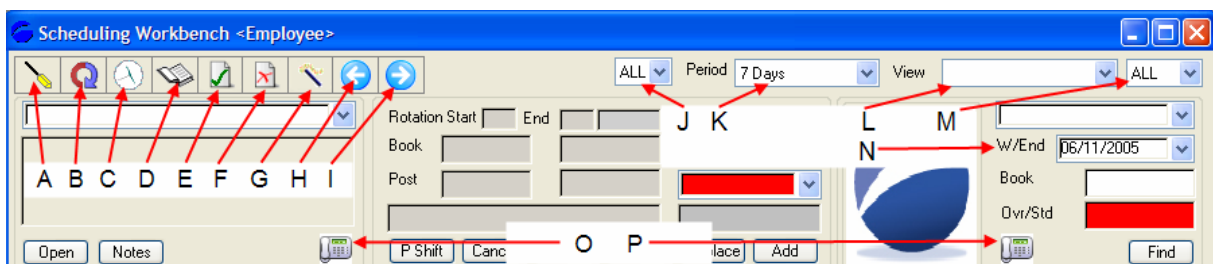
In very simple terms, rostering brings together an

- **Employee**, at a
- **Date and time**, to a
- **Rostering Location** (Outlet, Client, ...)

The rest of this document will introduce the various buttons and options available on the Scheduling Workbench. Please refer to the PowerForce rostering tutorials to learn how to apply the Scheduling Workbench in a practical manner.

The goal here is to introduce you to the “naming” conventions used throughout the PowerForce rostering tutorials when referencing this window.

We'll begin our introduction to the Scheduling Workbench, by covering the icons and buttons on the screen, all of which are designed to manage your staff and rosters.



**Figure 3 - Selecting a Rostering Operation**

Working from Left to Right, the icons represent:

**(A)** Brings up a menu selection to allow you to complete the following tasks, all of which are covered in their own tutorials.

- Maintain Standard Schedule
- Maintain Work Schedule
- Reset Permanent Shift Date

**(B)** Brings up the Schedule Generation screen, which we'll cover in a separate tutorial.

**(C)** Reflects an operation to confirm times.

**Note:** This is a feature which is not in general use, but remains to maintain backward compatibility. Its purpose is to acknowledge to the system that the employee has been notified of their shift details.

**(D)** Brings up the Scheduling Report Options. We have a whole section devoted to the various reports that you can run from this button.

**(E)** Brings up the Confirm Shifts button. Its principal use is for the manual confirmation of worked shifts.

**(F)** Allows you to Delete scheduled shifts, which is a fast key to delete a roster off the scheduling workbench.

**(G)** Allows you to create an “Ad-Hoc” shift. You’re prompted with a window which represents the minimum amount of information required to define a shift. This then places that ad-hoc shift onto the scheduling workbench for later assignment to an employee.

**(H) & (I)** The video “back” and “forward” buttons allow you to move through the rosters by 7 day increments. If your schedule display is 7 Days, the buttons allow you to move backwards / forwards in 7 day increments. The date revolves around the value in your “W/End” (week ending).

You may view your rosters in a 7, 14 or 30 days view. Be aware that if your video monitor does not support the required screen resolution to display the selected data that the screen will look congested. The recommended minimum screen size is 1024 x 768.

**J** gives you the ability to select the displaying of your clients or outlets.

If you have a large number of rostering locations the pop down is likely to become unwieldy and therefore you may select the display based on the first letter of the client or outlet. This then limits the display of outlets to those which start with the selected letter.

To revert to display all clients, select “ALL” from the pop down.

**K** is a pop down which represents the viewing “Period”, which reflects the number of days that you want shown on your screen.

**L** helps you manage how you see your workforce, and the “View” pop-down gives you the option to select various available views. The number of views that are shown is dependant on the configuration of your system, but the most general options are:

- Shift Spans (default)
- Standard Shifts
- Overtime
- Auto Allocated
- Class
- Role Type

So, as you can see, you have a great deal of flexibility in terms of the information display, and each of views helps you to quickly identify an

issue, such as you would see when selecting “Overtime” to show you all the overtime shifts in the period.

**M** is an alphabetical selection pop-down, which allows you to limit the employee names displayed.

You may select the first character of the employee’s surname to limit the number of employee names displayed, and select “ALL” to reset the display to display all your available employees.

The employees that you see in the pop down will be a function of your profile, and the default cost centre of the employee on their individual employee record.

**N** is the “Week Ending” entry, which sets the week ending date for the period that you are looking at. The pop down will present you with a one year’s calendar, from which you can make your selection. Similarly, you may key the week ending date in normal date format (dd/mm/yy).

**O** when selected will throw up an information screen representing the contact details for the rostering location.

**P** when selected will throw up contact information for the employee selected. With this button, you have immediate access to employee call details so that you can contact them as promptly as possible.

This completes the introduction to the icons and fields in the top section of the Scheduling Workbench. The operations that you will most often carry out are managed through the buttons as noted in Figure 4.



Figure 4 - Available Rostering Operations

- P Shift – Make a permanent shift
- Cancel – Cancel the select shift
- Book – Book a New Shift
- Edit – Edit the currently selected shift’s details
- Replace – Replace the employee on selected shift with another employee.
- Add – Add Employee to this week’s schedule, so that you can assign them a shift.

The functionality of these buttons will be covered in detail in the rostering tutorials.

The bottom section of the Scheduling Workbench serves as a display only area, and is represented by the following:

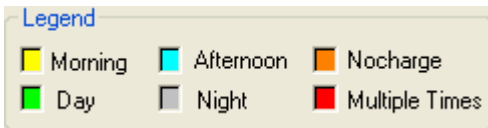


Figure 5 - Meaning of shifts when reflected by colour

The Scheduling Workbench uses the above colours to indicate the type of shift on display. This gives you a very quick indicator of the nature of the data on your screen.



Figure 6 - Shift Costing

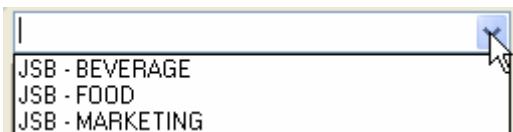
One of the strengths of the PowerForce rostering application is that it gives you immediate feedback on the actions that you take in rostering staff. The Shift Costing section allows you to monitor your labour resources in a summarised view. The tutorials will have further information on how to interpret the values in each of these fields.

The details for Figure 5 & 6 will come into their own when we start to manipulate rostered shifts. For the moment this introduction is meant to familiarise you with the dialogue which will be used throughout the tutorials.

# Starting Rostering

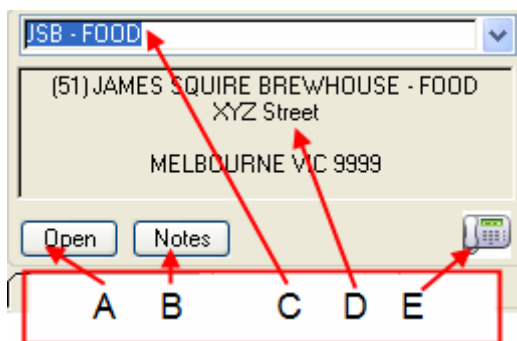
To complete your familiarisation with the scheduling workbench, in this section we bring up live data onto the screen and then explain the meaning of the various pieces of data.

When you click on the down arrow as shown in Figure 7, and select the location that you wish to manage, you will get a display screen similar to image below.



**Figure 7 - Select a Rostering Location**

**Note:** The number of locations that will display is governed by the system access that has been defined by your system administrator.



**Figure 8 - Rostering Location is selected**

- (A)**
- (B)**
- (C)** Shows the roosting location being managed.
- (D)** Shows the details of the roosting location being managed.
- (E)** Allows you to bring up the contact details for this roosting location.

# Managing the Employee

This section explains the various fields relating to an employee.

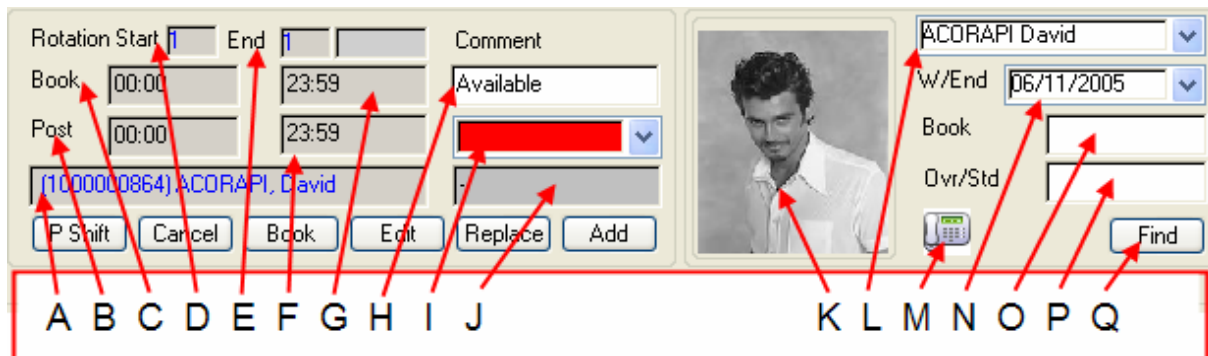


Figure 9 - Working with the Employee

- (A)** Shows the employee's payroll Id, and their full name
- (B)** Shows the Post Time for the selected shift. Post time refers to the actual time that the shift was worked. This entry is the time of the actual Start of the shift. In most instances this will be the same as the Book Time (see C).
- When any shift is first created, the system automatically sets the Post time to the same values as the Book Time.
- (C)** shows the Book Start Time, which refers to the scheduled start time of the shift.
- (D)** Shows the Shift Rotation
- (E)** Shows the Last Shift Rotation
- (F)** Shows the Actual Shift finish time.
- (G)** shows the Book Finish Time, which refers to the scheduled completion time of the shift.
- (H)** Shows the
- (I)** shows the
- (J)** Shows the
- (K)** Will show the image of the selected employee, if you've captured their images, otherwise a default image (as set up by your system administrator) will be shown.
- (L)** Shows the employee name
- (M)** When pressed with show you the contact details for the selected employee.
- (N)** Shows the Week Ending date for the rosters shown on this display.
- (O)** Shows the

**(P)** Shows the

**(Q)** Is the “FIND” button, which you will use to find a suitable employee for a shift, or shift replacement.

## Title

AUG 2005	Mon 08	Tue 09	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14
BAKER Leighton-22086	Available	Available	Available	Available	<i>17:00-02:30</i>	<i>16:00-21:45</i>	Available
BAUMER Scott-22091	Available	<i>11:30-17:00</i>	<i>11:30-17:00</i>	<i>11:30-17:00</i>	<i>10:30-17:30</i>	Available	Available
CATTANACH Brigitta-22092	Available	Available	Available	Available	<i>17:00-02:00</i>	<i>16:00-03:00</i>	Available
COLE Robert-22065	Available	Available	Available	<i>11:00-17:00</i>	<i>11:30-21:45</i>	<i>16:00-22:30</i>	Available
LUCAS Daniel-10387	<i>11:30-17:00</i>	Available	Available	<i>18:00-01:45</i>	<i>17:00-02:15</i>	<i>20:00-03:45</i>	<i>12:00-21:15</i>
MCPHILBIN Daniela-22058	<i>15:00-00:30</i>	<i>16:00-01:15</i>	Available	<i>08:00-17:45</i>	<i>10:45-22:00</i>	Available	<i>11:30-18:00</i>
MONTANO Michael-22013	<i>08:00-18:00</i>	<i>09:00-17:00</i>	<i>09:00-17:00</i>	Available	Available	Available	Available
PFLAUM Shauna-22061	<i>08:00-14:45</i>	Available	<i>08:00-16:00</i>	Available	<i>12:00-15:00</i>	<i>19:00-02:30</i>	Available
PFLAUM Shauna-22061# shift 2	Available	Available	Available	Available	<i>17:00-23:30</i>	Available	Available
ROBSON Gamiini-22041	<i>09:00-16:00</i>	<i>09:00-17:30</i>	<i>16:30-00:30</i>	Available	<i>08:45-16:00</i>	Available	<i>16:00-23:00</i>
SAMBALLI Rosalie-31009	<i>17:00-00:30</i>	Available	<i>16:00-00:30</i>	Available	<i>16:00-21:00</i>	<i>19:00-02:30</i>	62

**Figure 10 - Rosters from a Rostering Location perspective**

In this section we demonstrate how to interpret the data on your Scheduling grid.

**(A)** When you select an employee, their name will be highlighted (as shown).

**(B)** Shows how the display will appear to demonstrate “Split Shifts” in a day. The 2<sup>nd</sup> and following shifts will appear on a line of their own, and as you can see with the arrow pointing to the right, there are the times to reflect the split shifts.

**(C)** Shows you all the employees involved in the rosters for the period that you’ve selected to look at.

**(D)** Refers to the fact, that this employee is available for a shift on that date.

**(E)** Shows you two things:

1. The shift is a day shift – refer to the colour legend.
2. The text is bold and italicised, which indicates that this shift has been approved as having been worked. The hours shown are the actual hours that the shift was approved for.

**(F)** Is the same as for (E), other than it is a night shift, as per the colour legend.

**(G)** Is an example of how the Scheduling Workbench alerts you to the fact that this employee is working at Location “62” on Sunday the 14<sup>th</sup>. We’ll see this in the following section.

	AUG 2005	Mon 08	Tue 09	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14
Portland - Beverage		17:00-00:00		18:00-00:30		16:00-21:00	19:00-02:30	
Star - Beverage								00:45-03:45

A B C D E

Figure 11 - Rosters from an Employee perspective

- (A)** Displays the 2<sup>nd</sup> location that this employee is working during the period of this roster display.
- (B)** Displays the 1<sup>st</sup> location that this employee is working.
- (C)** Demonstrates that you've selected the "Employee" tab. The "Site" tab displays the rostering location.
- (D)** Displays the same rostering data as is shown on the rostering screen.
- (E)** Displays the rostering data for the employee's second rostering location.