

2013

ClockOn Training Workshop

Beginners 1 - Course Outline – Rosters

Version 4.1 and 4.3

All reference material, instructional guides and images contained in this document are the property of ClockOn Pty Ltd.

ClockOn ® v4.1, 4.3 © Copyright 2013
Tupalek Pty Ltd t/as ClockOn Pty Ltd
441a Ocean Beach Road,
Umina NSW 2250.

For support call 1800 002 912 or email : support@clockon.com.au



Training Data Installation & Connection to Conference

- Connect to phone conference 'lobby'
- ClockOn application installed locally
- Establish remote session connections

Introduction

- Objective of workshop
 - An introductory understanding of rosters.
- Previous experience level expected
 - No previous level of experience required
- Skills covered in workshop
 - Explanation of basic toolbars
 - Basic shift operations – create, change, delete, move
 - Creation of advanced leave
 - Creation of sick leave – splitting shifts
 - Basic template creation from existing roster
- Support Materials

Product Overview

- Logging in to the training data

Workshop Exercise 1: Configuring the Roster Workspace – beginners view

- Toolbars
- Selecting the screen layout
 - Panel layouts
 - Button sizes

Workshop Exercise 2: Adding Shifts & Leave

- Shifts
 - Selecting, shifts
 - Adding/deleting shifts
 - Cutting/copying/pasting Shifts
 - Adding/removing breaks
 - Saving/cancelling changes
- Leave
 - Adding leave
 - Changing existing shifts to leave
 - Public holidays
 - Preserving advanced leave bookings when rostering
 - Removing normal shifts or leave shifts only

Workshop Exercise 3: Constructing a Roster

- Adding shifts
- Booking leave
- Sick leave

Workshop Exercise 4: Creating Templates – a basic example

- Creating templates from existing rosters

Expected Outcomes of Beginners 1 Roster Course

- ☐ Create single shift
 - Double left click
 - right click, shift, add shift
- ☐ Create multiple shifts
 - Left click, hold mouse while dragging to create lasso, then right click, shift, add shift
- ☐ Copy shift
 - Select shift, right click, copy or copy using CTRL C
 - Select shift, select copy from toolbar at top of screen
- ☐ Cut shift
 - Select shift, right click, cut or cut using cut from the toolbar at top
- ☐ Paste shift
 - Select blank cell, right click, paste or paste using CTRL V
 - Select blank cell, select paste from toolbar at top of screen
- ☐ Delete shift
 - Select shift, right click, select delete
 - Select shift, select delete from toolbar at top of screen
- ☐ Moving single shifts
 - Select shift, hold left mouse while dragging shift to new position
- ☐ Moving multiple shifts
 - Select row or column, hold shift key on your keyboard, then drag shifts to new position
 - Left click, hold mouse while dragging over multiple shifts to create lasso then hold shift key on keyboard and drag shifts to new position
- ☐ Breaks
 - Add a break - Select shift, right click, select breaks, add break
 - Remove a break – select shift, right click, select breaks, remove break
- ☐ Saving the roster/cancel changes
 - Cancelling changes – select the cancel button from toolbar
 - Undo or redo change – select undo or redo from toolbar
- ☐ Create a leave shift
 - Right click, select shift, add leave, select the leave type required
- ☐ Splitting shifts for sick leave
 - Select shift, right click, shift, split. Then resize the two shifts created as needed. Select the shift that is to be sick leave, right click, shift change to, personal leave(paid)
- ☐ Changing a shift from normal shift to leave
 - Select shift, right click, select shift change to, select leave type
- ☐ Changing a leave shift to normal shift
 - Select shift, right click, select shift change to, select shift
- ☐ Booking leave in a future period
 - Rosters, select future roster period dates from toolbar at top of screen. When roster screen appears, use shift create tools to create leave shifts, then save.
- ☐ Preserving advanced leave bookings when rostering
 - When loading a template to a live roster that already has leave booked, select load/merge button.
- ☐ Removing normal shifts or leave shifts only
 - Where overlapping shifts appear, select the shifts, right click, select delete leave shifts only or delete shifts only

- Public holidays
 - Create shift worked – right click , shift, add shift
 - Create shift taken as public holiday leave – right click, shift, add leave, select Public holiday
- Create template from existing roster
 - Select all shifts using left click in top left corner of roster screen (just above location name), copy all selected using toolbar copy or CTRL C.
 - Turn on template button, position in cell to start paste, right click, paste. Select template save button, give template a name.