2013

ClockOn Training Workshop
Advanced - Course Outline – Rosters

Version 4.1 and 4.3

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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

Karen Askins
ClockOn Pty Ltd
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Training Data Installation & Connection to Conference

- Connect to phone conference 'lobby'

- ClockOn application installed locally

- Establish remote session connections

Introduction

- Objective of workshop
    - Gain an understanding of roster budgets

- Previous skills necessary

    - Beginner's 1 Roster course or equivalent experience using rosters
    - Beginner's 2 Roster course or equivalent experience using rosters
    - Intermediate Roster course or equivalent experience using rosters

- Skills covered in workshop
    - What are roster budgets?
    - Budget toolbar
    - Creating and balancing a budget
    - Budgeting for multiple locations
    - Comparing previous budgets
    - Reporting budgets

- Support Materials

Product Overview

- Logging in to the training data

Explanation of Roster Budgets

Explanation of Budget Toolbar

Workshop Exercise 1: Budgets – creating and balancing

- Selecting the costs to be included in the budget

- Entering roster budgets

- Balancing roster budgets

Workshop Exercise 2: Budgeting for multiple locations

- Loading multiple location budgets

- Balancing roster budgets for multiple locations

Workshop Exercise 3: Comparing previous Budgets

- Loading previous budgets for comparison

Explanation of Reporting for roster budgets

- Setting up a default budget report for rosters

- **Expected Outcomes of Advanced Roster Course**
- ☐ Know what a roster budget is for

- ☐ Understand the budget toolbar functions

- ☐ Select the costs to be included in the budget
    - o Select budget panel, select costs dropdown box, tick or untick relevant costs

- ☐ Create a roster budget
    - o Using an existing roster, select the percentage button % from the toolbar at the top of the screen and open the budget panel.
        - ▪ **Location level budget** - Enter the projected sales or payroll figure you are budgeting to in the sales$ column. Enter the budget % you are trying to achieve in the B% column.
        - ▪ **Department level budget** - Expand the + beside the budget dates to budget per department. Enter the projected sales or payroll figure you are budgeting to in the sales$ column. Enter the budget % you are trying to achieve in the B% column.
        - ▪ **Daily department level budget** - Expand the + beside each department. Enter the projected sales or payroll figure you are budgeting to in the sales$ column. Enter the budget % you are trying to achieve in the B% column.

- ☐ Balance a roster budget
    - o Once the budget sales$ (or payroll figure) and Budget % are entered, interrogate the roster and make changes to shifts to bring the budget into balance. Use Gantt 100 view (from toolbar) to zoom in on shifts.
    - o Use the +payslips in the budget panel to view wages specific to each employee on the roster.

- ☐ Load a previous budget for comparison
    - o Whilst in budget costing mode, in the budget panel, ensure maximum items are displayed (using desktop toolbar).
    - o Select the Periods dropdown box in the budget panel, tick the previous budgets for comparison, then select load (located in the budget panel tools)

- ☐ Set up default report for roster budgets
    - o Reports, Payroll (Budget), select the report you want to be your default and tick the default box, save.