

2013

ClockOn Training Workshop

Beginners 2 - Course Outline – Rosters

Versions 4.1 and 4.3

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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
 - An introductory understanding of rosters
- Previous skills necessary
 - Beginner's 1 Roster course or equivalent experience using rosters
- Skills covered in workshop
 - Managing roles, qualification, trading hours
 - Employees - roles, working week and unavailability
 - Correction of invalid timesheet entries from within rosters
 - Leave overview
 - Printing rosters
 - Emailing rosters – email blast and individual rosters
- Support Materials

Product Overview

- Logging in to the training data

Explanation of roles, qualifications, trading hours and employees.

Workshop Exercise 1: Creating a role, adding qualifications, attaching a role to an employee

- Location manager
 - Roles
 - Qualifications
 - Trading hours

- Employees
 - Attaching a role to an employee
 - Changing an employee's ordinary hours (working week)
 - Making an employee unavailable for a roster period

Workshop Exercise 2: Roster - Correcting invalid timesheets shifts

- Rosters
 - Selecting invalid timesheet shifts to edit
 - Correcting Actual start and Actual end times (clocked times)

Workshop Exercise 3: Roster – Leave Overview

- Leave
 - Determining free days
 - Patterns of leave
 - Viewing previous and future year's leave

Workshop Exercise 4: Printing and emailing rosters

- Setting up your default roster report
- Printing options – naming conventions, size fit to page
- Emailing rosters – individual and group rosters

- **Expected Outcomes of Beginners 2 Roster Course**
- Create a role
 - Location manager, select location, select Roles button, add role
- Create qualifications
 - Location manager, select location, select Roles button, select role, select Quals button, add qualifications using the ellipses button(...) or select existing qualifications from dropdown list
- Manage trading hours
 - Location manager, select location, select Hours button, change trading hours for the location, or expand the + to be able to change the trading hours for individual departments, save.
- Attach a role to an employee
 - Employees, select an employee, select Roles/qualifications tab 7. Use select button in top section of the screen to add roles and assign default role.
- Attach Qualifications to an employee
 - Employees, select an employee, select Roles/qualifications tab 7. Use select button in the bottom section of the screen to add qualifications to an employee.
- Changing an employee's working hours (ordinary hours)
 - Employees, select an employee, select Pay tab 3. Enter the hours and breaks at the bottom section of the screen. Save.
- Employee – make unavailable for a roster period
 - Employees, select an employee, select Unavailable tab 9. Select Add button at bottom of the screen, enter the date and time range, reason and select recurring if you want this appointment created more than once. Save.
- Viewing invalid timesheets via rosters
 - Rosters, select invalid timesheet button from toolbar at top of screen (pink clock)
- Invalid timesheets Actual start and end times – correcting all
 - Rosters, select invalid timesheet button from toolbar at top of screen (pink clock), select all double left click on top corner of roster area (just above the location), edit each timesheet entry and save.
- Invalid timesheets Actual start and end times – correcting a row or column
 - Column correction - Rosters, select invalid timesheet button from toolbar at top of screen (pink clock), selects all double at the top of a column of roster area (where the column date is), edit each timesheet entry and save.
 - Row correction - Rosters, select invalid timesheet button from toolbar at top of screen (pink clock), select all double at the side of a row of roster area (where the employee name is or where the role name is if you're in role mode), edit each timesheet entry and save.
- Invalid timesheets Actual start and End times - correcting individually
 - Rosters, select invalid timesheet button from toolbar at top of screen (pink clock), select all double left click on a shift, correct the timesheet entry and save.
- Leave Overview
 - **Determine free days** – select Leave Overview button from toolbar at top of screen (small grid). When 365 days appears the numbers in particular days on the calendar represents the number of employees who have taken leave on those days.
 - **Determine patterns of leave** – while on leave overview screen, select employee name from the employee panel. The number of leave days that employee has taken/booked – colour coded to leave type – is shown on the leave calendar. Right mouse click on a day to see the type of leave and who has booked leave.
- Default roster report
 - Reports, roster reports, select report that you want to be the default report from rosters, tick default box, save.

- Emailing rosters – group and individual
 - Emailing must be set up in ClockOn.
 - **Group Roster** – select reports, roster reports, open, enter parameters then preview. Use email button at top left hand corner or screen to email once report is displayed.
 - **Email Blast/ Individual Rosters** – select reports, roster reports, open, enter parameters then select Email button. Select Send button.