

2013

ClockOn Training Workshop

Intermediate - Course Outline – Rosters

Version 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
 - Gain a more in-depth view of tools for rosters and templates
- Previous skills necessary
 - Beginner's 1 Roster course or equivalent experience using rosters
 - Beginner's 2 Roster course or equivalent experience using rosters
- Skills covered in workshop
 - Maximum toolbar view
 - Advanced shift functions – sizing tools, swapping shifts
 - Managing templates – rename, delete, clear
 - Creating templates for rotating rosters
 - Creating component templates
 - Rates – adding to shifts
- Support Materials

Product Overview

- Logging in to the training data

Workshop Exercise 1: Configuring the Roster Workspace – advanced view

- Maximum toolbar view. Explanation of extra buttons.

Workshop Exercise 2: Advanced shift functions

- Sizing tools
 - Size to smallest/largest
 - Make same
 - Fit to trading hours
 - Spread shifts evenly
 - Align to start/end
 - Apply start/end
- Swapping shifts

Template Overview

- Templates from previous timesheets
- Rotating rosters
- Component templates

Workshop Exercise 3: Templates – Creation and management

- Load an existing template to a roster
- Change an existing template
- Rename an existing template
- Deleting a template
- Clear templates
- Create a new template from an existing roster
- Create two week's templates for a rotating roster
- Create a component template

Workshop Exercise 4: Rates

- Adding a rate to a shift
 - o Shift times
 - o Custom times
 - o Clocked times at payroll
 - o Shift start/clocked end at payroll

- Adding a predefined rate
 - o Part shift
 - o Entire shift

- **Expected Outcomes of Intermediate Roster Course**
- **Advanced shift functions**
 - Size to smallest– select shifts, right click, shift size, size to smallest
 - Size to largest– select shifts, right click, shift size, size to largest
 - Make same - select shifts, right click, shift size, make same
 - Fit to trading hours - select shifts, right click, shift size, fit to trading hours
 - Spread shifts evenly - select shifts, right click, shift size, spread shifts evenly
 - Align to start - select shifts, right click, shift size, align to start
 - Align to end - select shifts, right click, shift size, align to end
 - Apply start - select shifts, right click, shift size, apply start
 - Apply end - select shifts, right click, shift size, apply end
- **Swap shifts**
 - Select shifts, right click, shift, swap
- **Load template to roster**
 - Select template from template dropdown list, select load button (right beside the template dropdown box), select load template or load/merge button
- **Change an existing template**
 - Turn on template mode (big green button in the template toolbar). Select template from template dropdown list, select load button (right beside the template dropdown box), and select load template.
 - Make changes to the template, and then save using the template save button in template toolbar. Turn off template mode (big red button in the template toolbar)
- **Rename an existing template**
 - Turn on template mode (big green button in the template toolbar). Select template from template dropdown list, select rename button (right beside the red template mode button).
 - Rename the template, when prompted then save. Turn off template mode (big red button in the template toolbar)
- **Create a template from an 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.
- **Create rotating templates for a roster**
 - Follow the instructions for Create a template from an existing roster but when saving the template, enter a different name for your template for each week (e.g. week 1, week 2)
- **Creating component templates**
 - Follow the instructions for Create a template from an existing roster but select a smaller range of shifts to create smaller templates (e.g. select a particular department or select a particular set of roles)
- **Add a rate to a shift**
 - Shift times – select shift, right click, rates, add/edit rates, select add button, select shift times. Add rate value.
 - Custom times - select shift, right click, rates, add/edit rates, select add button, select custom times. Enter custom times and rate value.
 - Clocked times at payroll - select shift, right click, rates, add/edit rates, select add button, select clocked times at payroll. Add rate value.
 - Shift start/clocked end at payroll - select shift, right click, rates, add/edit rates, select add button, select shift start/clocked end at payroll. Add rate value.
- **Add a predefined rate to a shift**
 - Part shift – select shift, position where you want the time to apply, right click, rates, predefined rate (part shift), select predefined name.
 - Entire shift - select shift, right click, rates, predefined rate (entire shift), select predefined name.