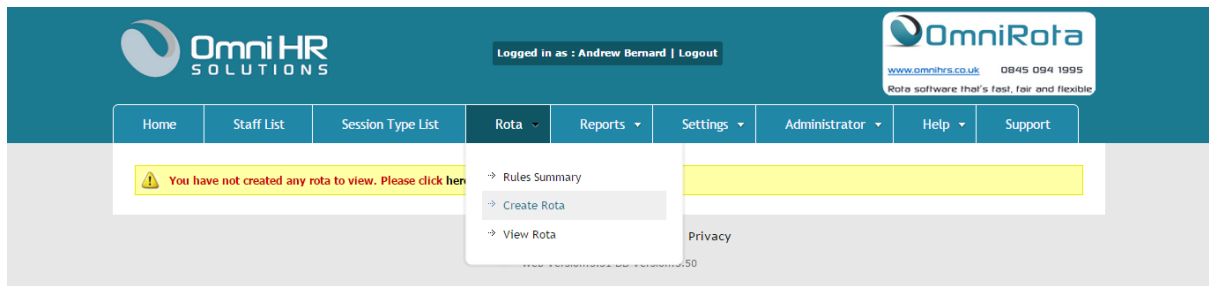


These instructions take you through the process of creating a new rota for all staff members.

Click on the 'Rota' tab and select 'Create Rota'.

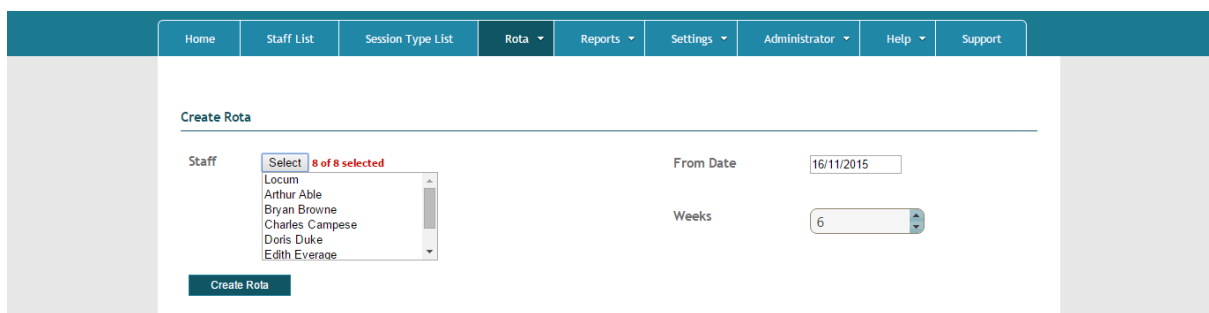


The screen below will open.

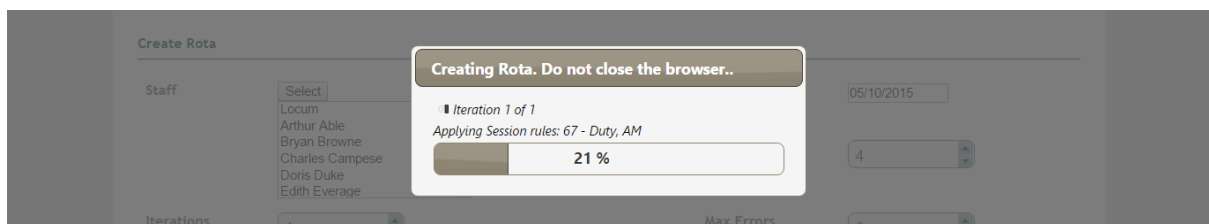
All staff are selected by default.

Select the rota start date and the number of weeks you want the rota to run for.

Now click the 'Create Rota' button.

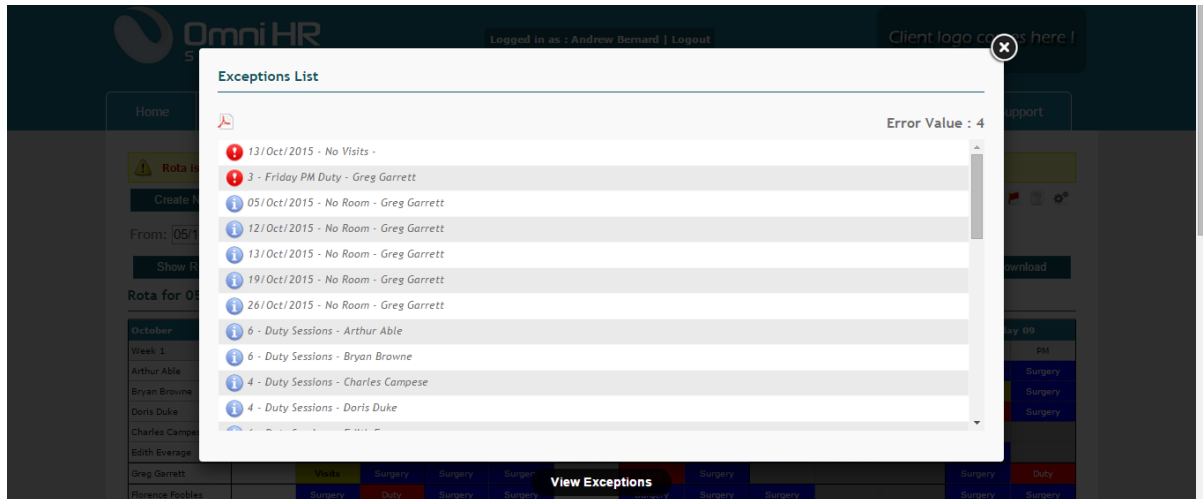


The screen below will appear as the computer moulds the staff and session rules around leave and other fixed commitments to come up with the best possible rota. Depending upon the size of your rota this can take as little as 20 seconds for a four week rota for a small surgery or as much as several minutes for a long rota for many people.



Viewing and Editing a Rota

Once the computer has finished creating the rota it will come up with an 'Exception Report'. The Exception Report shows you any instances that the rota was unable to comply with all the rules you specified to fill sessions with staff. Note that your Exception Report will not look the same as the one below as it is unique to your rota.

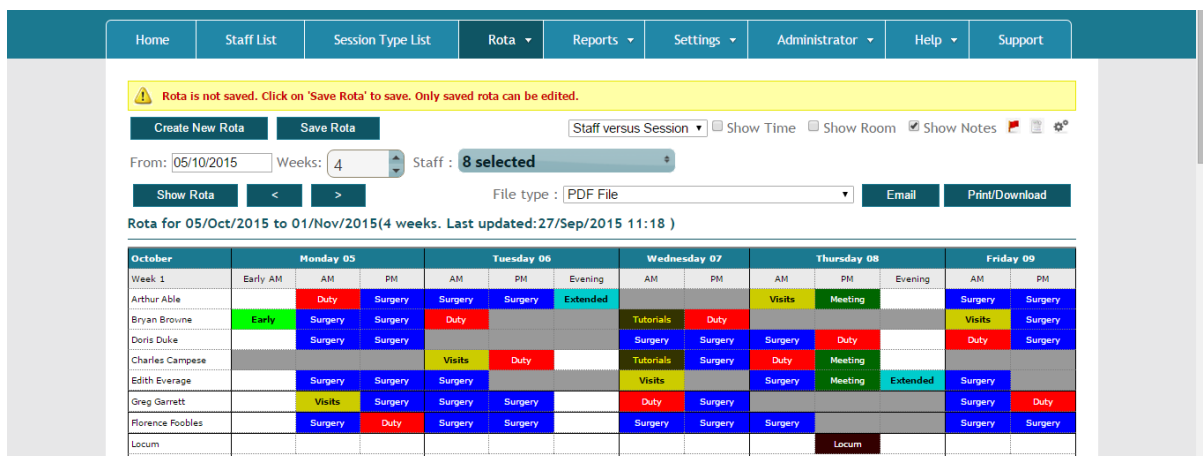


The exception report is very important as it allows you to plan in advance. In this example we can see that on 13th October the software could not find anyone to do Visits. You have the option to: 1. Book a locum well in advance to cover a session; 2. Leave the session uncovered; 3. Move somebody to cover the session.

In this demonstration we will show you how to move a staff member to cover Visits.

The first thing you need to do is close the Exception Report by clicking the 'X' in the top right corner – note that you can view it again at any time by clicking the Red Flag on the rota view.

Now you need to Save the created rota in order to make changes to it.



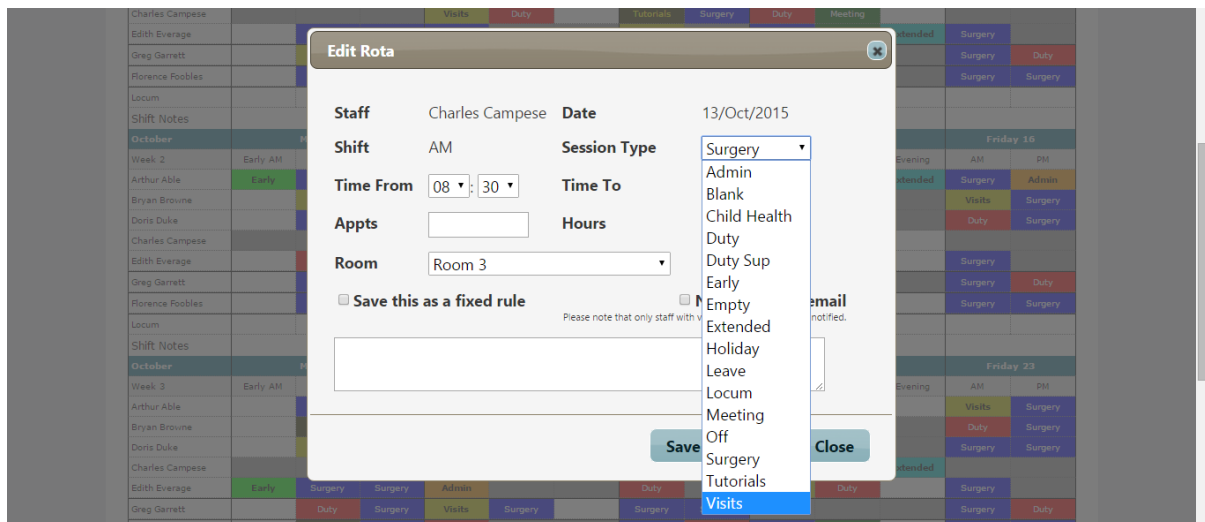
Changes to a Single Shift or Session

You can make whatever changes you require to your rota but in this example we will change Charles Campese from Surgery to Visits on 13th October.

Click on the appropriate session.

Shift Notes	Monday 12			Tuesday 13			Wednesday 14			Thursday 15			Friday 16	
Week 2	Early AM	AM	PM	AM	PM	Evening	AM	PM	AM	PM	Evening	AM	PM	
Arthur Able	Early	Surgery	Surgery	Surgery	Duty				Visits	Admin	Extended	Surgery	Admin	
Bryan Browne		Visits	Duty	Admin			Surgery	Surgery				Visits	Surgery	
Doris Duke		Surgery	Surgery				Surgery	Admin	Surgery			Duty	Surgery	
Charles Campese				Surgery	Surgery		Tutorials	Duty	Duty	Surgery				
Edith Everage		Duty	Surgery	Surgery			Surgery		Surgery	Duty		Surgery		
Greg Garratt		Surgery	Surgery	Surgery	Surgery	Extended	Visits	Surgery				Surgery	Duty	
Florence Fobles		Surgery	Surgery	Duty			Tutorials	Surgery	Surgery	Surgery		Surgery	Surgery	
Lucum							Duty							

The screen below will open up which contains all the details of the session that Charles is currently scheduled to work. All we need to change is the Session Type from, Surgery to Visits, via the drop down menu.



Now click 'Save and Close'.

The rota now shows Charles Campese working Visits instead of Surgery. Note the flag which indicates that the session has been manually altered. This is to allow you to keep track of any changes you make to your rota.

Shift Notes	Monday 12			Tuesday 13			Wednesday 14			Thursday 15			Friday 16	
Week 2	Early AM	AM	PM	AM	PM	Evening	AM	PM	AM	PM	Evening	AM	PM	
Arthur Able	Early	Surgery	Surgery	Surgery	Duty				Visits	Admin	Extended	Surgery	Admin	
Bryan Browne		Visits	Duty	Admin			Surgery	Surgery				Visits	Surgery	
Doris Duke		Surgery	Surgery				Surgery	Admin	Surgery			Duty	Surgery	
Charles Campese				Visits	Surgery		Tutorials	Duty	Duty	Surgery				
Edith Everage		Duty	Surgery	Surgery			Surgery		Surgery	Duty		Surgery		
Greg Garratt		Surgery	Surgery	Surgery	Surgery	Extended	Visits	Surgery				Surgery	Duty	
Florence Fobles		Surgery	Surgery	Duty			Tutorials	Surgery	Surgery	Surgery		Surgery	Surgery	
Lucum														

You can make as many manual changes to your rota as required and the software can also be set to send an automatic email notification to staff that their session has been changed.

Changing Multiple Days/Shifts for Individual or Multiple Staff

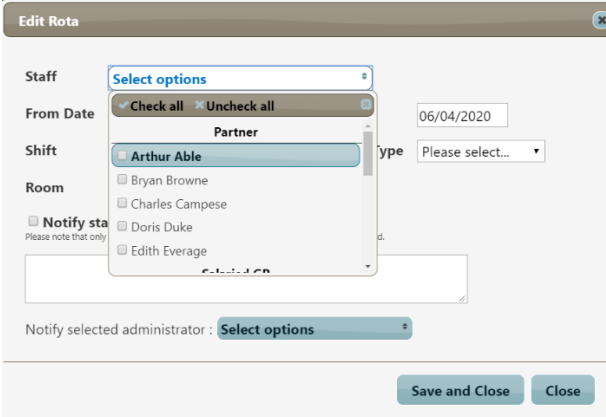
You can make wholesale changes to the rota for individual or multiple staff members for shifts, days or even weeks at a time.

Multiple Staff Members for an Individual Shift

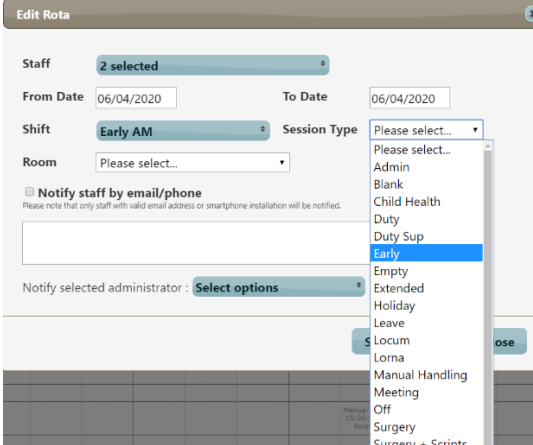
Click on the appropriate shift:

April	Monday 06			Tuesday 07			Wed
Week 1(1 of 2)	Early AM	AM	PM	AM	PM	Evening	AM
Arthur Able	Surgery 07:30-08:30	Surgery 08:30-13:00	Surgery 13:00-18:00	Surgery 08:30-13:00	Surgery 13:00-18:00	Surgery 18:00-20:00	Surgery 08:30-13:00
Bryan Browne							
Charles Campese				Visits 08:30-13:00	Duty 13:00-18:00 Room 3		Tutorial 08:30-13:00 Training R
Doris Duke		Surgery 08:00-13:00	Duty 13:00-18:00 Room 4				Duty 08:30-13:00 Room 4
Edith Everage		Duty 08:30-13:00 Room 5	Surgery 13:00-18:00 Room 5				Surgery 08:30-13:00 Room 5

In the dialogue box that opens, select the staff members to whom you wish to apply the change:



Then select the session type to which you wish to change them:



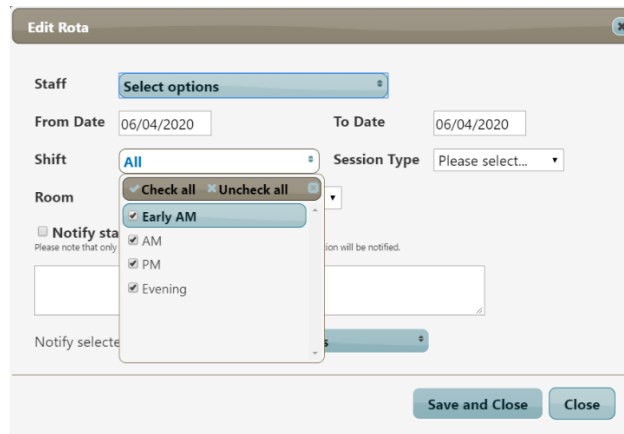
Finally, check the box to notify staff or selected administrators of the changes via email and Save and Close.

Changes to Individual or Multiple Staff on Multiple Shifts on the Same Day

As above but click on the day/date to which you wish to apply changes:

April	Monday 06			Tuesday 07			Wednesd
Week 1 (1 of 2)	Early AM	AM	PM	AM	PM	Evening	AM
Arthur Able	Surgery 07:30-08:30	Surgery 08:30-13:00	Surgery 13:00-18:00	Surgery 08:30-13:00	Surgery 13:00-18:00	Surgery 18:00-20:00	Surgery 08:30-13:00
Bryan Browne							
Charles Campese				Visits 08:30-13:00	Duty 13:00-18:00 Room 3		Tutorials 08:30-13:00 Training Room
Donis Duke		Surgery 08:00-13:00	Duty 13:00-18:00 Room 4				Duty 08:30-13:00 Room 4
Edith Everage		Duty 08:30-13:00 Room 5	Surgery 13:00-18:00 Room 5				Surgery 08:30-13:00 Room 5
Greg Garrett	Early 07:30-08:30	Surgery 09:30-13:00 Room 2	Surgery 13:00-18:00 Room 1	Duty 08:30-13:00 Room 2	Surgery 13:00-18:00 Room 2		Visits 08:30-13:00

The dialogue box that opens defaults to the selection of all shifts, but you can change this using the drop down menu:



You can then make changes to the staff selected and the session type exactly as above but they will be applied to all the shifts that you have selected on that day.

Save and Close as above.

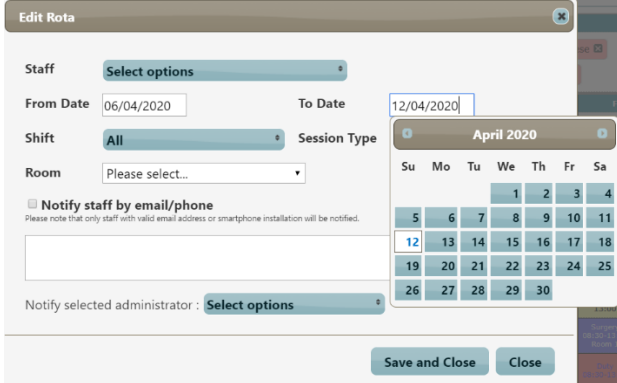
Changes to Individual/Multiple Staff for Multiple Days

Finally, it is possible to change multiple days in one go.

Click on the Week 1 (or 2 or 3 etc.) in the top left corner:

April	Monday 06			Tuesday 07			Wednesd
Week 1 (1 of 2)	Early AM	AM	PM	AM	PM	Evening	AM
Arthur Able	Surgery 07:30-08:30	Surgery 08:30-13:00	Surgery 13:00-18:00	Surgery 08:30-13:00	Surgery 13:00-18:00	Surgery 18:00-20:00	Surgery 08:30-13:00
Bryan Browne							
Charles Campese				Visits 08:30-13:00	Duty 13:00-18:00 Room 3		Tutorials 08:30-13:00 Training Room
Donis Duke		Surgery 08:00-13:00	Duty 13:00-18:00 Room 4				Duty 08:30-13:00 Room 4
Edith Everage		Duty 08:30-13:00 Room 5	Surgery 13:00-18:00 Room 5				Surgery 08:30-13:00 Room 5
Greg Garrett	Early 07:30-08:30	Surgery 09:30-13:00 Room 2	Surgery 13:00-18:00 Room 1	Duty 08:30-13:00 Room 2	Surgery 13:00-18:00 Room 2		Visits 08:30-13:00

The dialogue box that opens now defaults to all shifts on all days for that week. You can make changes to the date range to cover fewer days within that week or extend it to cover a period greater than one week:



Edit Rota

Staff: **Select options**

From Date: 06/04/2020 To Date: 12/04/2020

Shift: **All** Session Type: **Select options**

Room: **Please select...**

Notify staff by email/phone
Please note that only staff with valid email address or smartphone installation will be notified.

Notify selected administrator: **Select options**

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Save and Close **Close**

You can then select staff members and session types in exactly the same way as above.

Save and close.