

Setting-up Checklist

Set up

- Make a copy of the roster and rename it with the new roster date. (Model Browser -> Select Roster, Right-click to duplicate and rename)
- Open the new roster (Double-click the new roster)

Roster

- Set the **date** for the first Monday for the week to be generated (Roster → Roster)

Attendance

- Enter the Planned Attendance numbers. (Attendance → Planned Attendance)

Data

- Run all data imports (Main Menu Toolbar → Click any/all Blue Hamburgers showing)
- Check all staff member details are current and accurate (Staff → Payroll)
- Remove staff from the Roster layout who aren't working at the centre. (Staff → Roster Order)
- Add any staff who are not yet on the Roster Order (Staff → Roster Order)
- Run The Update Roster Layout process (Data Menu → Update Roster Layout)

Staff

- Set regular working and non-working days for staff (Staff → Work Days)
- Set Responsible Persons on the roster (Staff → Work Days)
- Assign staff to rooms they may work in (Staff → Staff Areas)
- Set shift-lengths for any staff working unusual shifts e.g. Chef (Staff → Shift Lengths)
- Set a fixed start time for staff who must start at the same time each day e.g. Chef or Centre Manager (Staff → Shift Lengths, Preferred Start Time field)

Note: Any Earliest Start times in **Staff** → **Availability** will be overridden for any staff who have a Preferred Start Time entered.

- Set staff availability for any staff with availability limitations (Staff → Availability)

Roster

- Enter any programming, ISS or study time for staff (Roster → Other Duties)
- Return to the Roster (Roster → Roster) and Generate the initial Roster (Click Daitum Logo)
- Review the Rostered Hours column on the far right for red entries (Roster → Roster)