



TriOnline Roster Procedure Manual



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Software North has been developing software solutions since 1981 and is now wholly responsible for the development of the well-known TriMicro suite of Aged Care Software products. Software North is dedicated to the development of 'value-for-money' solutions for the Australian Aged Care Industry and continues to do this with the TriMicro suite of applications.

TRIOOnline – TriMicro Cloud Rosters

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- **SMS** – send SMS messages to employees and manage assigning shifts with automated SMS.
- **Reports** – manages, runs and saves reports.
- **Maintenance** – manages key data types such as employees, areas, shift templates.
- **Notification Counter** – displays a red circle with the number of unread notifications (if applicable).
- **Username** – click this to manage your TriOnline account (also exits the roster).

Roster Grid

The roster grid is the focal point of the TriOnline Roster. It is a flexible, dynamic, digital report that can be customized and filtered to show almost anything about the state of the roster at your facility.

There are many ways to structure the grid, including grouping, and extensive filtering options. Refer to the section on **view settings** for more information on customizing the roster grid, and saving a grid type as a **pre-set view**.

Most of the day-to-day workflow will be done in the roster grid. Double clicking shifts will open an edit fly-out to view and modify the details of that shift. Context menu options can be triggered by right-clicking on almost any part of the roster grid and its items, containing powerful shortcuts to other features. See the section on **context menu** for more.

The roster grid can even be printed to a paper report. Refer to the section on **reports** for more.

Rosters

Master Rosters

The first order of business should be creating and filling your master roster. We recommend having a Master Roster which is kept as your base template. A Master Roster should not have leave of any sort, and should preferably have no unassigned shifts.

This is the roster that generally is copied to be used as a basis for fortnightly rosters. You may have more than one master roster.

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Master rosters:

- Do not correspond to any particular pay period.
- Can be named.
- Can be created, copied, and deleted, but not finalized.
- Can only be edited by a user with elevated permission level.

If you have standard allowances that are paid on the same shifts each fortnight, these can be added to the Master Roster.

This Master Roster is subsequently copied to a new Working Roster as you progress from one payrun to another, meaning you only need to make minimal changes each fortnight based on employees swapping shifts or taking leave.

Any operational changes should be reflected in your Master Roster which would then be applied to all future Working Rosters.

Tip: You can have multiple Master Rosters (ie. if you have alternate fortnights)
However, be mindful that adding or removing terminated employees would need to be done in all Master Rosters if you use them regularly as templates.

Regular Rosters:

Regular rosters are generally copied from master rosters and are your normal day to day working roster.

Regular rosters:

- Cannot be named.
- Are numbered according to their pay run.
- Can be created, copied, deleted and finalised.
- Can be edited by basic roster users.

To select a roster, click on the roster selection dropdown:



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Here you will see a list of your rosters both active and finalised. The number on the left is the pay run number that the roster represents. The master roster(s) will be named with no corresponding pay run number.

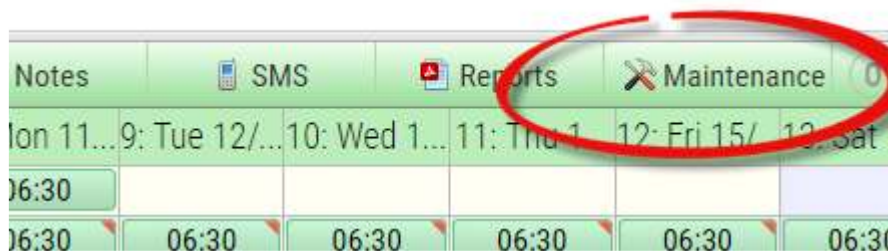
Selecting a roster from this list will remove the current roster from the grid and display the selected one.

For more information, – refer to **Switching between Rosters**.

Create a New Roster

To create a new roster, click the “Maintenance” button in the toolbar. The first option “Rosters” will be selected. From here you can add, edit or delete Master Rosters and regular rosters that haven’t been locked or finalised.

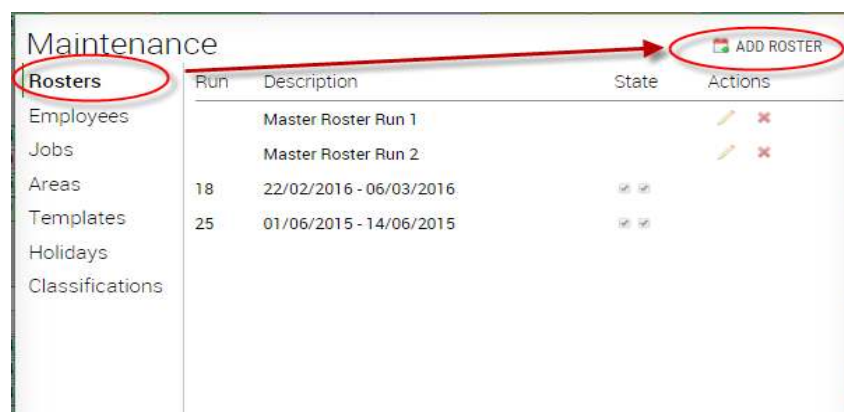
1. Select **Maintenance** near top right corner of screen



2. Select **Rosters** on the left.

In the top right corner is a button “Add Roster”, when clicked a second fly-out will appear. In this fly-out you can choose to either copy a blank or existing roster to a new master roster or payrun.

Then select **Add Roster** on the right.



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First Roster View – when you create a new roster

The first screen for a new roster will look similar to this:



This is simply a blank **Master Roster** (for definitions and semantics, see **Working with your Roster**).

Adding Entities

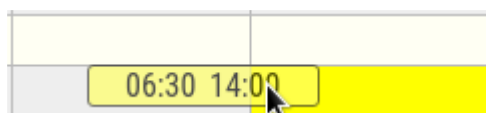
To begin adding entity rows to the roster (e.g. Employees, Jobs, etc.), simply click the **Add** button located in the top left of the **Toolbar** (refer to **Adding a new Employee and Job**).

Creating Shifts

There are multiple ways to create shifts on the **Grid**. One possible way is to double-click on any empty **shift cell** (or **day**). You can also achieve this by pressing the spacebar whilst a **shift cell** is highlighted or by right clicking on an empty cell and selecting **New Shift** (see **Context Menu**).

Dragging Shifts

The roster grid allows dragging and dropping of shifts. This can be seen here:



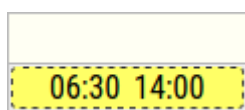
This allows shifts to be dragged and dropped to different days. Simply left-click and hold whilst the mouse is over a shift and move the mouse to the desired location and finish holding the left-click button on the mouse.

Cutting/Copying and Pasting Shifts

The roster grid also supports cutting/copying and pasting of shifts. These are assigned to the **CTRL+X**, **CTRL+C** and **CTRL+V** shortcuts respectively. You can also access these commands through the **Context Menu** (see **Context Menu**)

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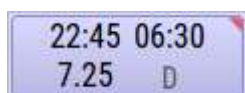
When “cutting” a shift, the shift outline will change to a dotted border



When copying the shift border will not change. Once you have chosen the desired location for the shift(s), pasting the shift(s) will move them if cutting, or create a copy when pasting.

Shifts

The “Shift”



The term “shift” refers to the representation of a shift, service or task on the roster grid. A shift shows defining information of the entity it represents at a glance. The amount of data shown on each shift can be customised by creating a separate preset view (see **Views**). Shifts also have their own context menu (see **Context Menu**).

Template Colours

Template colours are a flexible and powerful way to differentiate between and create shifts based upon their beginning and end times (see **Templates**).

Clashes

A clash can occur on shifts, services and tasks. There are several criteria for a clash, but the most common is when a shift, task or service overlaps with another that is assigned to a single employee/job or client. Clashes are shown by a dark red colour on the shift. The reason for a clash can be seen by hovering the mouse over the affected shift:



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Leave Shifts

When a shift or service is classified as “On Leave” the shift representing it will be greyed out. The type of leave the shift/service is assigned can be seen by hover the mouse over the shift:



Shift Indicators

On some shifts you'll notice there are indicators in the corners of some shifts. These can indicate a number of things ranging from a note associated with the shift, to showing that a shift has been reassigned elsewhere. (Refer to **Working with your Roster** for more information)

NB: Refer to “Working with your Roster” for more information on shifts.

The Context Menu – (right mouse click)

The context menu gives you access to powerful tools depending on where you use it. It is recommended that you try it on various sections of the roster grid, as you will find very helpful features that will assist you in making large changes very quickly.

The context menu can be accessed by right-clicking on the roster grid and will alter itself depending on where you use it.

The context menu can be triggered on:

- Shifts
- Shift Cells
- Employee/Job Titles
- Tasks (CDC Only)
- Clients (CDC Only)
- Services (CDC Only)

Multi-Select Shifts

The grid allows you to select multiple shifts. Most actions such as context menus, dragging and dropping, and cutting/copying and pasting are possible whilst multiple entities are highlighted.

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Layout

The layout and structure of the roster grid is determined by the view and filter settings. There are many ways to structure the grid, from the basic Default - Job Shift View to the rather complex grouping and sorting views. For more information on how to create, edit and delete views, see **Views**.

Unassigned Shift Rows

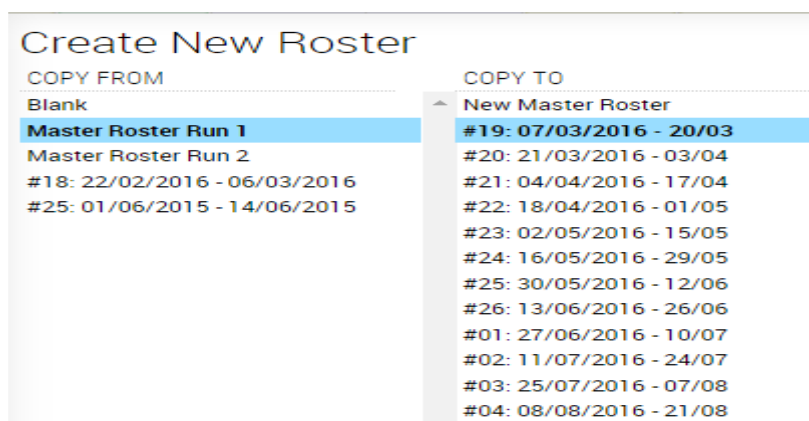
Unassigned shift rows can be created when a job is added to the roster without being attached to an employee. They can also be created when a shift is designated as a leave shift and needs to be reassigned.

From an unassigned row, shifts and services can be assigned to an employee by right mouse clicking on the shift, dragging and dropping, or by cutting/copying and pasting. (Refer to **Working with your Roster** for more information)

Coping a Roster

Single click to select the COPY FROM. Roster on the left

1. You can choose the Master Roster, an existing Working Roster (an existing payrun) or a Blank Roster.



2. Single click to select the COPY TO. Roster on the right.
In this example we are copying from Master Roster Run 1 to Roster #19

If a new master rosters is chosen, you will be required to name it. Master rosters must have unique names. Then simply click the "Create" button and your new roster will be created.

3. Click Create and a fly out will pop up to enable you to name your roster, then click OK to save or Cancel to go back to the screen.

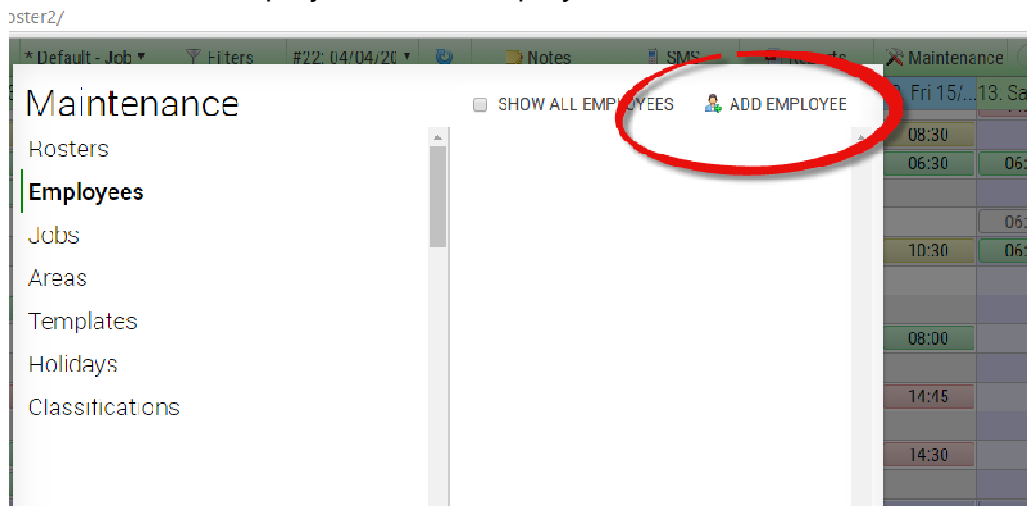
Adding a new Employee and Job

Employee information is shared by the Payroll and the Roster. So immediately after an employee is entered into the Roster, it will be visible in the Payroll, and vice versa.

If you have multiple rosters that all transfer to a single payroll database, then you only need to set up the new "Employee" once. You then add a new and unique "Job" for each classification and for each roster, the unique identifier for these is the cost centre.

Adding a New Employee

Go to Maintenance – Employees – Add Employee



In the Roster, you will be asked to enter minimal Employee information:

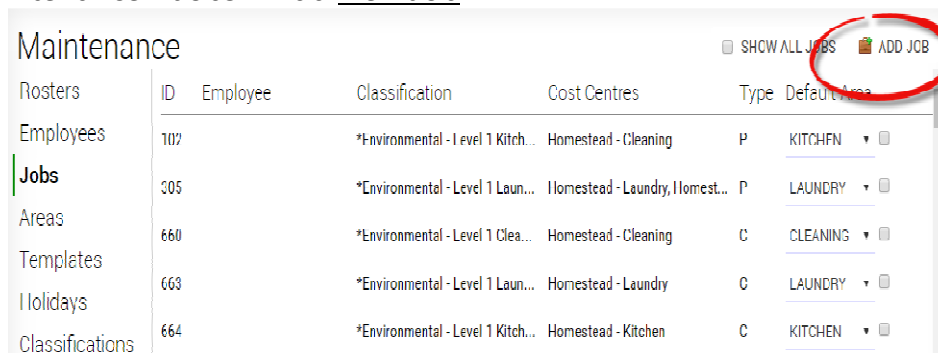
- Timeclock ID – only required for those with Timeclocks. Refer to **Timeclock Procedure – Employee Setup**.
- If you do not have a date of birth, don't worry, just put in 01/01/1970, and the Payroll will correct this when the rest of the Employee's information is added
- NOTE: Once an Employee has been added, it will no longer be editable in the Roster, with the exceptions being the 'Preferred Name field, Address, Phone numbers, Email and the 'Timeclock number'.
- This Employee will now be in the Payroll database, with very basic information. *You need to ensure your payroll department still receives all required information on this new employee to ensure they get paid (ie. tax file number declaration, bank details, superannuation fund, police check, and any other pertinent information as required).*
- Any other editing of this will now be the responsibility of the Payroll. *If you have made a mistake, do not enter in another new employee, or you will now have two employees of the same name in the payroll database.*
- **Be careful about spelling mistakes**
-

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So far, all you have done is create a new person, but you are yet to indicate what classification they are. Once the Employee is added, their Job/s needs to be added.

Adding a New Job to an Employee

Go to Maintenance – Jobs – Add New Job



The screenshot shows a web interface for 'Maintenance' with a sidebar menu on the left containing 'Rosters', 'Employees', 'Jobs' (highlighted), 'Areas', 'Templates', 'Holidays', and 'Classifications'. The main area displays a table of jobs with columns: ID, Employee, Classification, Cost Centres, Type, and Default Area. The table contains five rows of job data. In the top right corner, there are two buttons: 'SHOW ALL JOBS' and 'ADD JOB', with the latter circled in red.

ID	Employee	Classification	Cost Centres	Type	Default Area
102		*Environmental - Level 1 Kitch...	Homestead - Cleaning	P	KITCHEN
305		*Environmental - Level 1 Laun...	Homestead - Laundry, Homest...	P	LAUNDRY
660		*Environmental - Level 1 Clea...	Homestead - Cleaning	C	CLEANING
663		*Environmental - Level 1 Laun...	Homestead - Laundry	C	LAUNDRY
664		*Environmental - Level 1 Kitch...	Homestead - Kitchen	C	KITCHEN

Select the required information from the drop downs, then 'Save



The screenshot shows the 'Add New Job' form. It has six dropdown menus: 'Employee' (selected: ADAY, Ardis), 'Company' (selected: 1: TriMicro Test Facility), 'Classification' (selected: CLEAN1: *Environmental - Level 1 Clear), 'Cost Centre' (selected: Homestead - Cleaning), 'Work Type' (selected: Part-Time), and 'Start Date' (placeholder: dd/mm/yyyy). A blue 'Save' button is at the bottom.

The start date **MUST BE THE ACTUAL COMMENCEMENT DATE FOR THAT JOB.**

REMEMBER that you may need to set up one employee with several Jobs based on the Jobs they do. eg Cleaning, Kitchen, Laundry - this example would require 3 jobs to be set up with the correct Cost Centre to each.

Any new jobs created should be communicated to your payroll staff, who will now need to check the jobs and ensure that the payroll has linked any multiple jobs for the purposes of:

1. Linking jobs for hours of service & progression through pay points
2. Removal of leave anniversary dates on new Casual jobs

Now that your new employee has a new job, you can now add this job to your Roster and start assigning shifts to that employee's job.

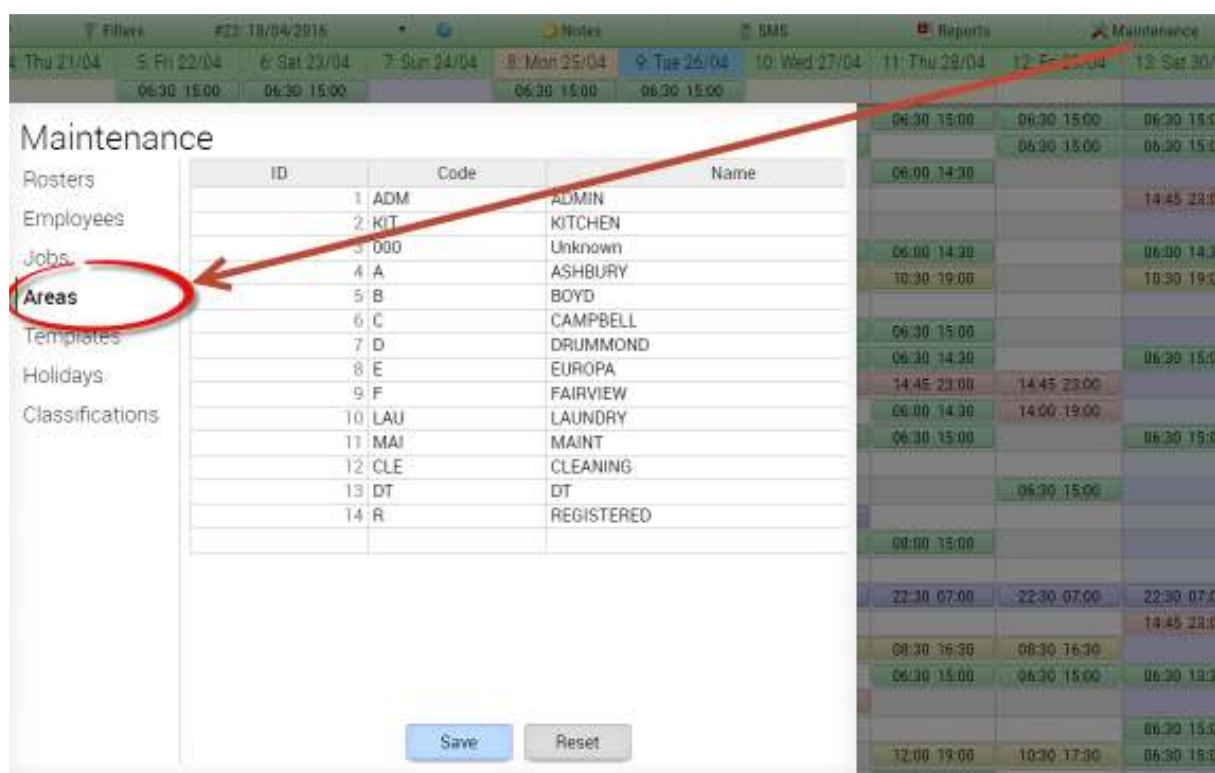
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You have now created a new employee with one or more jobs and you can start allocating shifts to them in your roster. However, as yet they are unable to be PAID until they are activated by your payroll personnel. They need bank account, tax file number and superannuation fund information, amongst other requirements, before an employee can be paid.

Areas

Your roster can allocate shifts to certain Areas, these will allow you to separate certain shifts for your Roster Reports.

You can align these Areas to your Payroll Cost Centres, but are not linked to them in the payroll in any way. To be clear, Roster “Areas” in your Roster do not transfer to the Payroll “Cost Centres”.



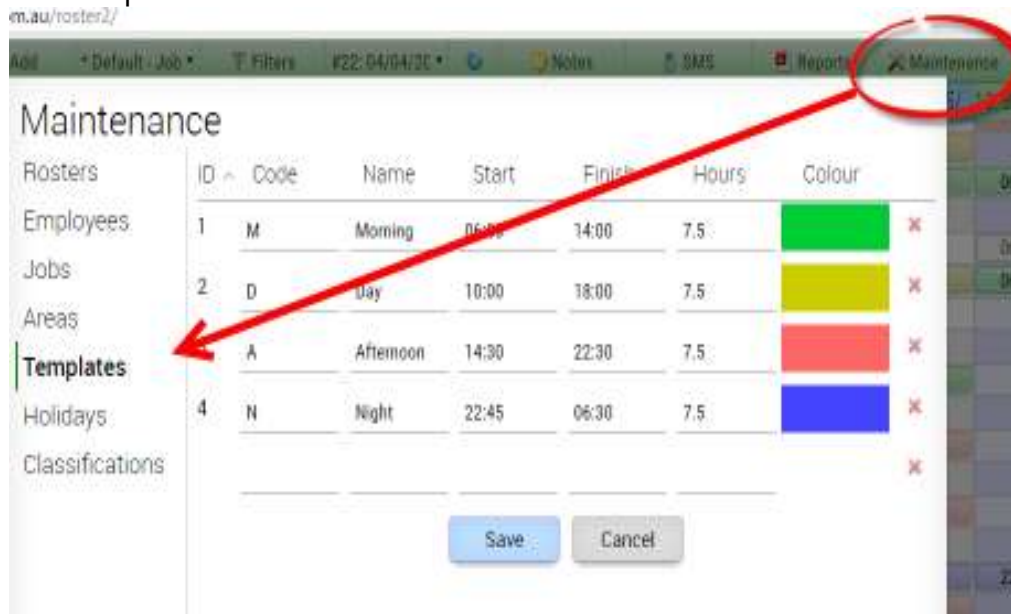
NB: When you add a new job to an employee, the default area won't be automatically created until you add a shift for that employee on the roster and select the appropriate area. This will then become the default area, however, this can be changed manually if necessary. The TriOnline Roster monitors the number of shifts rostered in the areas and will automatically change the default area if more shifts are rostered in a different area.

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Templates

These are templates that can assist you in completing your roster, and also allows a colour to be selected to highlight different shift types.

These are set up in the Maintenance section.



In the above screen shot, there are 4 basic shift templates.

If you look at your general roster grid, all shifts are coloured, and are represented by the colour that matches closest to one of the Shift Templates.

These colours can be changed.

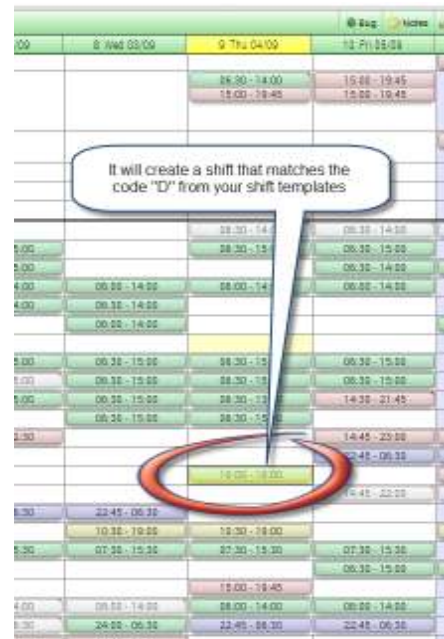
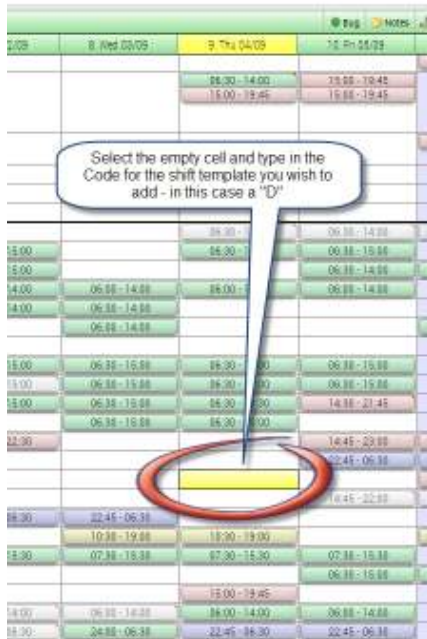
- You cannot edit the ID column this will be automatically allocated as to the number of codes added.
- You can edit the Code of your Shift Template (2nd column)
- You can edit the description/name of your Shift Template (3rd Column)
- You can edit the start and finish time of your Shift Templates (4th & 5th column)
- You can edit the colour code (6th column) and also use the same colour for additional codes if you wish.
- The default templates can be amended and additional templates added.

NB: BE CAREFUL - if templates are deleted, these will be removed from the roster.

To delete a template, click on the **X** on the right hand side and it will be removed. To save any changes, click on the save button. If you wish to cancel any changes, click on the reset button and the template will refresh automatically.

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When you are looking at your normal roster grid, you can simply select a blank day for an employee, and type the "Code" from the 2nd column, this will enter in the default shift for that code.



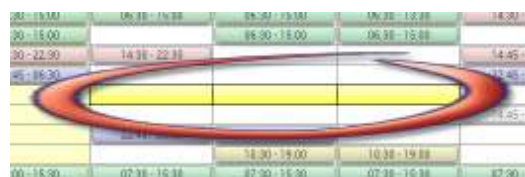
Example - highlight the shift and if using the same templates as the above screen shot (where D is the Day Shift 1000-1800)

If you type "D" onto your roster grid with the blank cell selected, it will create a Day Shift from 1000-1800 (or as determined by your own individual Templates that you have set up). Refer to the **Templates** section

Multiple Cells at once

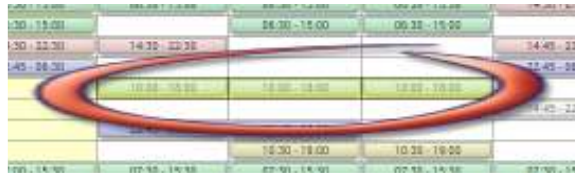
You can select multiple blank cells, by holding control as you left click on the shifts, and then type in "D" and it will add a Day Shift from your template into all selected cells.

In the below example, if you have three cells selected and type "D", it will create a day shift in all three cells



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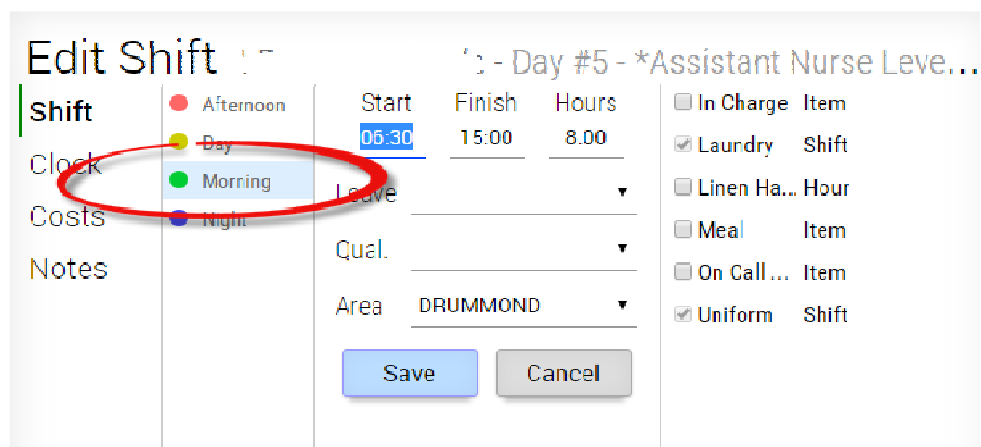
would become



The image shows a portion of a roster grid. A red oval highlights a shift template in the center. The grid contains various shift templates with start and finish times, such as 06:30 - 15:00, 14:30 - 22:30, and 18:30 - 05:00.

Additionally, if you are editing an employee's shift, you can simply click on the Shift Template on the left hand side to edit the shift to match one of the other templates.

For example, if the current shift is a Morning Shift 0630-1500

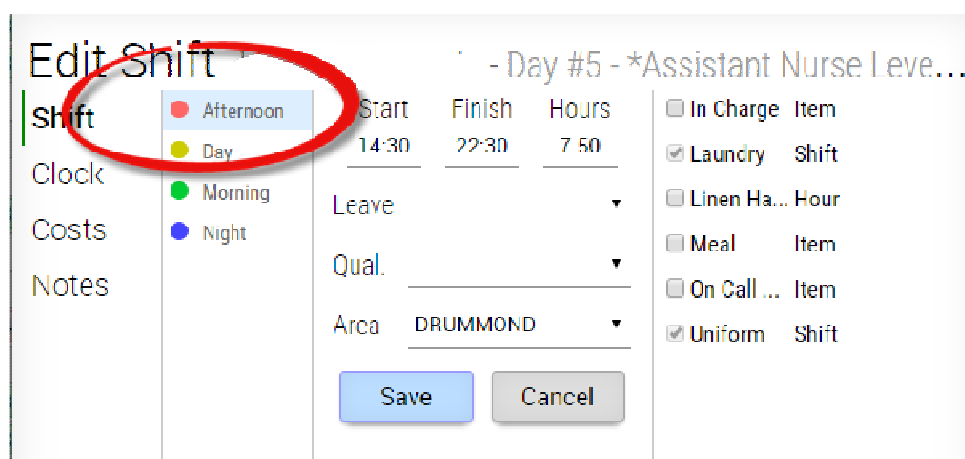


The 'Edit Shift' form is shown. On the left, under the 'Shift' section, the 'Morning' shift template is selected and circled in red. The form displays the following details for the selected shift:

Shift	Start	Finish	Hours
Morning	06:30	15:00	8.00

Other fields include 'Area' set to 'DRUMMOND', 'Qual.', and 'Leave'. On the right, there are checkboxes for 'In Charge', 'Laundry', 'Linen Ha...', 'Meal', 'On Call ...', and 'Uniform'.

Then by clicking on the Afternoon Shift, it changes the times to the Afternoon Shift template without having to type them in separately.



The 'Edit Shift' form is shown again. This time, the 'Afternoon' shift template is selected and circled in red. The form displays the following details for the selected shift:

Shift	Start	Finish	Hours
Afternoon	14:30	22:30	7.50

Other fields include 'Area' set to 'DRUMMOND', 'Qual.', and 'Leave'. On the right, there are checkboxes for 'In Charge', 'Laundry', 'Linen Ha...', 'Meal', 'On Call ...', and 'Uniform'.

Therefore, if you have a range of standard shifts, you can edit your Shift Templates to match and this may assist you in making any roster changes you need to make, or managing your Master Roster.

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View Settings

Summary

To open view settings, select “Edit Views...” from the pre-set view dropdown, or you can click the “Filters” button. Here, you can fully customize how the roster grid is displayed in TriOnline Roster. You can also use this to adjust some settings for reports that rely on view and filter options to work properly. As soon as you make a change by ticking/unticking an item, it will automatically change the status to “unsaved view”

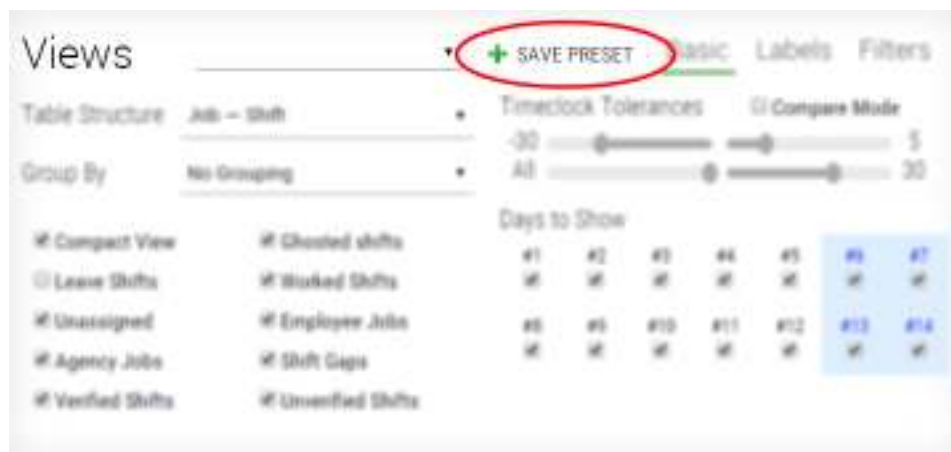
Pre-set Views

TriOnline Roster comes with a set of default pre-set views that you can use as a foundation for creating custom views of your facility's data. Each pre-set view is a specific combination of view and filter settings, set in the “**Default-Job**” fly-out. You can easily switch views from the pre-set dropdown at the top of the page, in the toolbar.

Creating Pre-set Views

To create a new pre-set view, first open the “**Default-Job**” fly-out by selecting “Edit Views...” from the view dropdown. Make all necessary changes to the current view settings (across all tabs) as required – see view settings section for more information.

Once finished, click the “Save Pre-set” button at the top of the fly-out and enter a name for the pre-set.



Removing Pre-set Views

Open the “**Default-Job**” fly-out and select the pre-set view you wish to remove, then click the “Remove” button. Note that you cannot remove system pre-set views at launch.

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Editing Pre-set Views

Open the **“Default-Job”** fly-out and select the pre-set view you wish to edit, then click the **“Edit”** button. You can then change any parameters for the view and click **“Save”**.

Basic

The most common options are found in this tab, and generally deal with higher-level options, as opposed to the more granular settings in the label and filter tabs.

The screenshot shows the 'Views' configuration panel with the 'Basic' tab selected. The panel includes a 'Job Shift' dropdown set to 'Job → Shift', a 'REMOVE' button, and tabs for 'Basic', 'Labels', and 'Filters'. Under 'Table Structure', 'Job → Shift' is selected. Under 'Group By', 'No Grouping' is selected. There are two columns of checkboxes: 'Compact View', 'Leave Shifts', 'Unassigned', 'Agency Jobs', 'Verified Shifts' on the left, and 'Ghosted shifts', 'Worked Shifts', 'Employee Jobs', 'Shift Gaps', 'Unverified Shifts' on the right. 'Timeclock Tolerances' are set with sliders for '-30' (positioned at approximately 15) and 'All' (positioned at approximately 15), with values '5' and '30' shown on the right. A 'Compare Mode' checkbox is present. The 'Days to Show' section displays a grid of 14 days, with days #6 through #14 highlighted in blue. Each day has a checkbox, all of which are checked.

Compact View

When checked, shifts, labels, and totals will only show one line of information – significantly reducing the amount of vertical space used. This varies by screen resolution, but on many monitors this means only the first two labels on the shift will be shown. Note that this will not be applied to grid reports. (refer to **Working with Roster** for more information).

View of roster - select **“Default – Job Shift”** on the roster grid, then select **Edit Views** at bottom of drop down.

This screenshot is similar to the previous one but shows the 'Default - Job Shift' dropdown menu open, highlighting the 'Default - Job Shift' option. The 'Basic' tab is still selected. The 'Table Structure' dropdown is set to 'Job → Shift' and the 'Group By' dropdown is set to 'No Grouping'. The checkboxes and sliders are the same as in the previous screenshot. The 'Days to Show' section shows a grid of 14 days, with days #1 through #5 highlighted in blue. Each day has a checkbox, all of which are checked.

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Compact layout

06:30 - 14:30	14:30 - 22:30
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Non Compact Layout

06:30 - 14:30 N/A - 7.50	14:30 - 22:30 SICKNOCERT - 7.50
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Feel free to experiment with these options to display the Roster Grid in your preferred Views. You can also save a “preset view” of a preferred roster view.

Ghosted Shifts

When checked, items that are hidden (either because of filter settings or the other basic view toggles) are shown as “ghosted” transparent shifts. When unchecked, they will be hidden completely from view.

Other Basic View Toggles

The checkbox denotes whether these items are shown. These do not apply to reports apart from the grid report.

- Leave Shifts – shifts that are on leave (generally these appear as grey and semi-transparent)
- Worked Shifts – shifts that are NOT on leave
- Verified Shifts – shifts that have been verified through the time clock compare process
- Unverified Shifts – shifts that are still yet to be verified through the time clock compare process
- Permanent & Casual Jobs – you can view the roster with either or both jobs
- Employee Jobs – jobs (rows) worked by payroll employees (as opposed to agency or unassigned)
- Agency – jobs (rows) worked by agency employees
- Unassigned – shifts that are not assigned to a specific job
- Unavailability – employees who are unavailable for shifts

Table Structures

- Job / Shift
 - Each row is a job
 - Shifts are shown in the cells
 - Unassigned shifts are shown at the top, grouped by classification
- Employee / Shift - Each row is an employee (otherwise similar to “Job / Shift”)

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- Rostered Time / Shift
 - Each row is a shift time (start and finish)
 - Shifts are shown in the cells, grouped by their original rostered times
- Actual Time / Shift - same as "Rostered Time / Shift", but grouped by the final time after verification

Grouping Options

Grid can be grouped by multiple attribute types. Not all of these will make sense in your chosen table structure, so user discretion is required to make meaningful views.

- **Area** – applies to shifts, services, and clients
- **Classification** – applies to shifts, and jobs
- **Shift Template** – applies to shifts, and tasks

Time clock Tolerances

These four sliders indicate what criteria is being used to separate shifts that match up *close enough* with the time clock clockings, from those that need to be manually checked as part of the time clock reconciliation or time compare process. The first two sliders indicate the arrive early (blue) and arrive late (red) tolerances. The second line indicates the leave early (red) and leave late (blue) tolerances. Blue means the shift was extended due to the actual clocking time, while red means that it was shortened. Refer to **Time Clock – Roster Compare Manual** for more information.

Compare Mode

- Shift colours are stripped to make the red/blue/green coloured text easier to read
- Double clicking on a shift will open up the edit window for the shift automatically opening to the clockings tab
- Clockings that are not matched to shifts appear in the cell of the day/employee they belong to
- Clockings for unmatched time clock IDs are shown grouped by row at the top of the grid
- Employees without a time clock ID are highlighted
- Context menu options for shifts is changed to show compare-specific options

Note that while compare mode can be used in any combination of views, it is recommended to use with employee/shift view, hide leave/unassigned shifts, with shift labels showing "Start", "Finish", "Clocking Times", and "Original Times". If this is confusing, just use the system pre-set view for time compare instead.

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Days to show

Use the checkboxes to show/hide individual columns in the grid. Click and drag to quickly toggle multiple boxes on and off at once. Weekends are highlighted in a light blue for convenient day of week filtering.

Labels

TriOnline Roster allows you to customise the quantity and order of labels that appear in both the first row, the total row, and on the shifts themselves. Each view can selectively show the important information, without being forced to display information that is irrelevant for the view's particular purpose or your facility structure.

Views ▼ + SAVE PRESET Basic Labels Filters

Rows	Shifts	Totals
☒ Entity Name	☒ Start	☒ Total Hours
☒ Classification	☒ Finish	☐ Worked Hours
☒ Phone Number	☒ Clocking Times	☐ Leave Hours
☒ Program	☒ Original Times	☐ Total Cost
☐ Address	☐ Hours	☐ Contract Hours
☐ Area Name	☐ Area Code	☐ Count
☐ Client Group	☐ Cost	
☐ Job Work Type	☐ Leave / Qualifier	
☐ Template Name	☐ Template Code	
	☐ Template Explicit	
	☐ Employee Name	
	☐ Classification	

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Rows

These show in the first column of each row. Most only make sense in specific table structures, so user discretion is advised to make meaningful view combinations.

- **Entity Name** – the name of the job, employee, classification, service type, client etc.
- **Classification** – applies to jobs
- **Phone Number** – applies to job, employees, clients
- **Program** – applies to client (CDC only)
- **Address** – applies to jobs, employees, clients
- **Area Name** – applies to clients
- **Client Group** – applies to client (CDC only)
- **Job Work Type** – applies to jobs
- **Template Name** – applies to shift times

Shifts

These show inside of every shift in the grid. On most monitors, two small shifts (or one large) will fit on each line.

- **Start** – the time that shift starts
- **Finish** – the time that the shift finishes
- **Clocking Times** – shows clockings that matched up to the start and finish times – these are colour coded when the compare mode option is checked
- **Original Times** – shows the original rostered start and finish times before verification took place
- **Hours** – paid worked time
- **Area Code** – code of the area (if applicable)
- **Cost*** – total cost of the shift, including allowances and penalty rates
- **Leave / Qualifier** – e.g. "Sick", "AL", "Train", "PHBR" etc.
- **Template Code** – code of the closest template matching the shift – see "Templates" for more
- **Employee Name** – full name of the employee working this shift (if applicable)
- **Classification** – code of the classification that this shift is rostered for

* **Note:** costings in TriOnline Roster are not yet guaranteed to be exactly accurate, and are a (close) estimate of what will be paid. These costings will become more accurate over time, but will never be 100% if there are unassigned shifts remaining.

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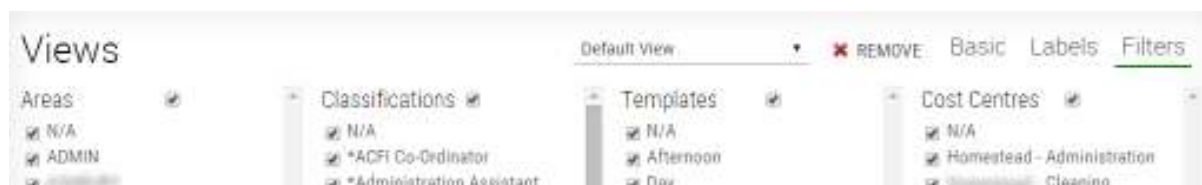
Totals

These show in the last column of each row (total cell), and in the bottom row of each grid (total row).

- **Total Hours** – the full count of hours
- **Worked Hours** – only includes hours for items that are NOT on leave
- **Leave Hours** – only includes hours for items that ARE on leave
- **Total Cost** – the sum of shift costs
- **Contract Hours** – hours contracted for this job/employee per pay period
- **Count** – the number of shifts/tasks

Filters

This tab of the view fly-out enables you to toggle what will be shown in the grid (or on reports). Each type of area, classification, template etc. will have a checkbox to toggle it as shown or not shown. Each group (area, classification etc.) has a global checkbox to turn them all on or off at once.



The items that can be filtered are:

- **Areas** – applies to shifts
- **Classifications** – applies to shifts, and jobs
- **Templates** – applies to shifts
- **Cost Centres** – applies to jobs

TRIOOnline – TriMicro Cloud Rosters

Normal Roster View

1. **Day & Dates** – these are displayed at the top of the grid for the selected roster period.
2. **Employee “jobs”** - being paid or added are listed on the left, top to bottom. Employees can have multiple “jobs” – ie. different positions or cost centres.
3. **Unassigned Shift** – these are displayed at the top of the roster.
4. **Total Hours for each employee’s job** - appear in the right hand column. To view total hours worked for each employee over multiple jobs, select
5. **Totals hours for each day** - appear at the bottom of the roster – may have to scroll down to see this totals row.

	1: Mon 02	2: Tue 03	3: Wed 04	4: Thu 05	5: Fri 06	6: Sat 07	7: Sun 08	8: Mon 09	9: Tue 10	10: Wed 11	11: Thu 12	12: Fri 13	13: Sat 14	14: Sun 15	Hrs
*Enrolled Nurse W...															
*Registered Nurs...	06:30	06:30			06:30	06:30	06:30	06:30	06:30					06:30	8.00
APPERSON, Albina			06:30	06:30	06:30	06:30	06:30				06:30	06:30	06:30	06:30	72.00
ATHEY, Antone			06:30	06:30		06:30	06:30	06:30	06:30	06:30		06:30	06:30	06:30	75.50
AUGSBURGER, Ap...				06:00							06:00				10.00
AVANS, Abbey													14.45		7.75
BURGETT, Beatrice	06:00	06:00		06:00				06:00		06:00	06:00		06:00	06:00	64.00

Working with your Roster

Add to Roster

To add items to the roster, click on the “Add” button in the toolbar (on the left). Click to select the jobs, classifications, or employee that you want to add to the roster.

Then click the “Add” button with the tick and the employee will be added to the roster. Alternatively, double-click on a row to quickly add that single item.

ID	Employee ^	Classification	Cost Centre
26	ALDER, Alphonso	*Home Care Employee level 3	THC - Care
33	ASPER, Agustina	*Home Care Employee level 3	THC - Care
42	CHRISTIAN, Chelsey	*Home Care Employee level 3	THC - Care

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Shifts

1. Shifts can be dragged & dropped, by selecting one shift and holding down the left mouse button, before being moved and dropped on another day/employee.
2. Shifts can be copied & pasted to another employee (or on the same employee)
3. Many changes are made by doing a right click on a shift (or group of multiple shifts) and selecting from the available menu list.



If you are simply editing a single shift, you can double click to open up the Edit screen

4. To select a group of shifts to change, (ie. the same change to multiple selected shifts)
 - a. Click on the first Shift – hold down the shift key on your keyboard – click on the last shift. They will all be highlighted yellow.
 - b. Right click on one of the highlighted shifts and you will then have the same selection menu to change the group of shifts



5. Multiple shifts can be selected and moved simultaneously

- To select continuous shifts

Left click on the first shift. Then hold down the *Shift* key on your keyboard. Whilst holding down the Shift key, left click on the last continuous shift. All shifts from start to finish will be highlighted for you to edit accordingly.



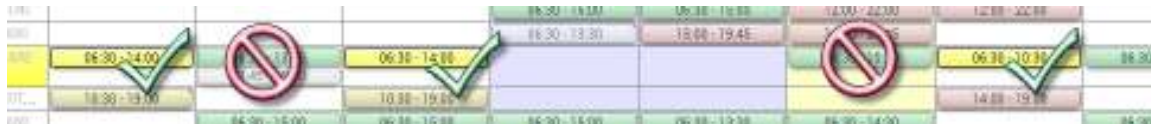
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- To select ad-hoc or random shifts

Left click on the first shift. Hold down the *Control* key on your keyboard.

Whilst holding down the Ctrl key, left click on all ad-hoc shifts that you wish to edit.

All individual shifts selected will now be highlighted. If incorrect shifts have been highlighted, left click on the screen, this will remove selected shifts.



TIP: DOUBLE CLICK on an Employee's Name on the left hand side to SELECT ALL of their shifts on that Job.

6. To swap two shifts between two Staff (or on same employee).

Click on one of the two shifts you wish to swap then hold down the Ctrl key then click on the other shift to be swapped – both shifts will be highlighted in yellow. Then right mouse click and select Swap Shifts. If you swap a shift and it displays in **RED** as displayed below, if you place your mouse over, a pop up will display notifying you of the reason. Eg shift overlaps, total rostered hours at the bottom of the page are different due to the hours in the shift.



- This can be two different employees on the same day
- This can be two different employees on different days
- This can be two different days on the same employee

A confirmation box will pop up, asking you to confirm that you wish to swap the two particular shifts that were selected.

7. Split Shifts are possible, please note that such split shifts will need to be checked for the total hours. Breaks are automatically deducted from shifts based on the criteria set in the Payroll system.

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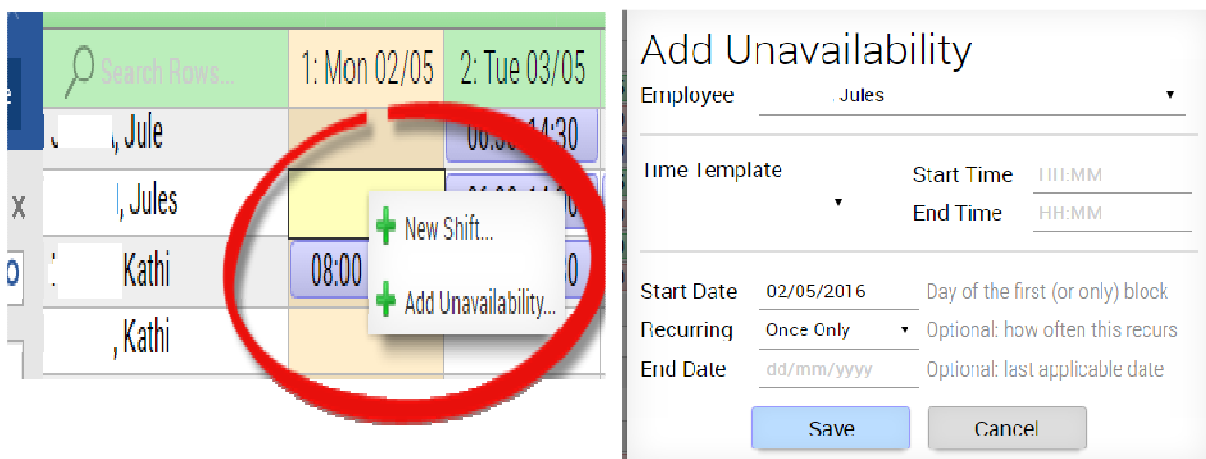
8. Adding Qualifiers to a shift (ie. Overtime, Public Holiday Base Rate, Training)
 - a. Select the relevant shift/s and Edit as per Steps 1 or 2 above
 - b. Click on the Qual. Box



- c. Select the Qualification from the drop down list and save the changes.

NB. If more than one shift is selected, the Qualification will be applied to all shifts

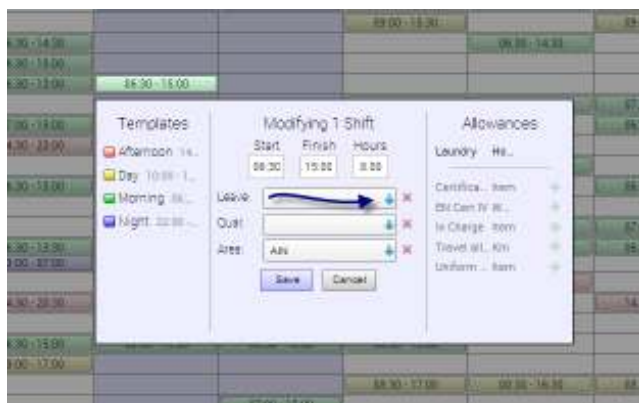
9. Staff Unavailability can be selected by right mouse clicking on a shift, (refer to screenshot below), then click on the “Add Unavailability” and a fly-put window will appear. Enter unavailability details, which also include the ability to select as recurring.



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10. Allocating a shift as a type of Leave

- a. Select the relevant shift/s and Edit as per Steps 1 or 2 above
- b. Click on the Qual. Box



- c. Select the Qualification from the drop down list and save the changes.
NB. If more than one shift is selected, the Qualification will be applied to all shifts
- d. **IMPORTANT** – Check that your Enterprise Agreement or Award allows for the payment of the leave type you are selecting.

Tip: "Maternity Leave" is often the cause of incorrect rostering and care should be exercised. Maternity Leave is NOT the Gov't Paid Parental Leave. Maternity Leave only applies if your Enterprise Agreements allows for it, which is in addition to any Gov't paid parental leave scheme.

If your Employer does not offer Maternity Leave as part of your conditions, but your employee is claiming the government's 18 weeks Paid Parental Leave, this 18-week period should be rostered as Leave Without Pay (LWOP) in your roster. Your payroll staff will add the relevant fortnightly payments into the payroll system based on documents provided to them by Centrelink.

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- e. When you select a leave type (ie. annual leave) you then have the option to assign that shift to another employee who will work the shift, unassign and move the shift to the unallocated shift area at the top of the roster, or to do nothing (ie. not replace the shift) – please refer to diagram below

11. Areas – If your roster has different Areas, these can be allocated to particular shifts. These areas can then be used for filtering the view of your roster.
Use steps similar to those above and edit the Area (if available)

12. Allowances

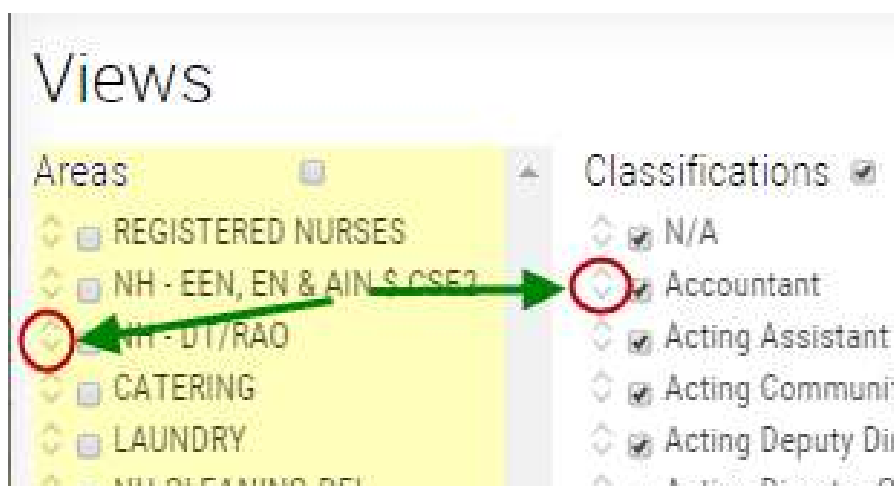
- Select the relevant shift/s and Edit as per Steps 1 or 2 above
- Available allowances are listed on the right hand side:
 - If automatically applied from the payroll – they cannot be edited or deleted;
 - Additional allowances can be selected if applicable to the shift.

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13. To filter and reorder Groups on your Report

You can FILTER your roster to show only certain classifications, areas, shift types, or cost centres.

Tick the box next to the Group if you want to include it in your report
You are also able to reorder the headings – a single click and hold on these toggles in the view screen, allows you to drag and drop the headings into different positions.

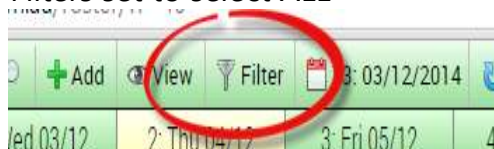


These 2 tools determine the way these Groups appear on your screen and on reports, just the way you want them.

If some classifications are not showing, ensure that filtering is set to show all classifications. If new classifications are added into the payroll database, you may need to reset your filtering to show all classifications.

NB. If one of your filters is NOT marked as selecting all, your Filter button will appear shaded in red.

All Filters set to select ALL



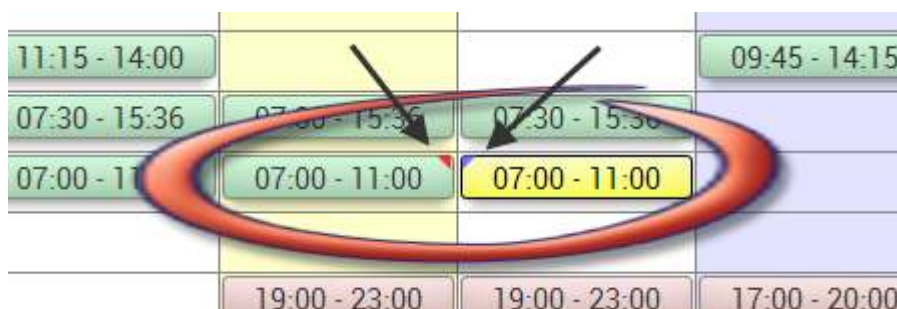
All Filters NOT set to select ALL



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14. Shifts that are allocated as leave and were reassigned to another employee.

If the shift was reassigned or is linked to another employee, there will be a red tick mark on the top right corner. The employee or shift will be listed when you open the shift for editing. Shifts that have allowances added have a blue tick mark on the top left corner.



11:15 - 14:00			09:45 - 14:15
07:30 - 15:36	07:30 - 15:36	07:30 - 15:36	
07:00 - 11:00	07:00 - 11:00	07:00 - 11:00	
	19:00 - 23:00	19:00 - 23:00	17:00 - 20:00

Adding an Employee's Job to a Working Roster

When you have selected the relevant Roster (a Working Roster or Master Roster) you can add either a new Employee Job or an Unassigned Shift (Classification).

- Unassigned Shifts will appear at the top of your Roster, and can be assigned to employee's at a later date
- Employee Jobs can be added to the list, and shifts can then be added to this person's job

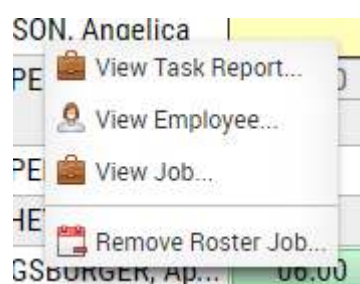
Click on Add – Add to Roster is displayed, then select the employee and job that you need either by entering their name in the "search" engine, or scroll down and then select the employee. You can then double click on highlighted employee and they will be added automatically or click again on the add button.



ID	Employee	Classification	Cost Centre
305	ADAY, Ardis	*Environmental - Level 1 Laundry	Homestead - Laundry, Homest
660	AGUDELO, Aisha	*Environmental - Level 1 Cleaning	Homestead - Cleaning
663	AGUDELO, Aisha	*Environmental - Level 1 Laundry	Homestead - Laundry
664	AGUDELO, Aisha	*Environmental - Level 1 Kitchen	Homestead - Kitchen

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If you have accidentally added the wrong employee, select the employee and right hand click and select Remove Roster Job and the employee will be removed from the roster. Currently the “View Job” navigates to all employee jobs, and the “View Task Report” navigates you to another screen – both these features are currently being developed. The “View Employee” navigates to the employees’ details.



REMEMBER: IF the particular Job you need for an employee is not available, (ie. The employee needs multiple jobs for different cost centres or pay rates) do not hesitate to add a new job to the employee. Refer to “Add New Job” on previous page.

Be mindful that your payroll team may need to link your newly created jobs with pre-existing jobs, to ensure that the employee progresses to higher pay points when they work sufficient hours. Please discuss with your payroll staff if you have any questions.

If an employee has more than one Job, it is also IMPORTANT that you do not assign shifts to a Job that belongs to another Cost Centre. This could cause the employee to be paid an incorrect rate of pay for that shift.

Removing an Employee Job from a Working Roster

If you want to remove a job from a roster, you need to remove any shifts first. These can be moved to another employee, unassigned, or deleted altogether, please refer to the section (**Working with Your Roster**)

Once you have removed the shifts to suit your requirements, you can right click on the employee’s name and remove from the roster.

If an employee’s job has been terminated in the payroll system, it will now appear shaded in RED on your roster. This should be removed before you wish to transfer your roster to the payroll on payday.



Employee	Shift 1	Shift 2	Shift 3	Shift 4	Shift 5	Shift 6	Shift 7	Shift 8
ANKE	11:00 - 22:15	09:00 - 18:00	06:30 - 15:00					
ANKE		09:00 - 18:00		07:00 - 15:00	07:00 - 15:00	07:00 - 15:00	07:00 - 15:00	06:30 - 15:00
ANKE		06:30 - 15:00	15:00 - 18:00		06:30 - 15:00			06:30 - 15:00
ANKE	08:00 - 15:30	09:00 - 18:00	00:00 - 15:30	08:00 - 12:00	00:00 - 15:30	08:00 - 15:30	08:00 - 15:30	08:00 - 15:30
ANKE						15:00 - 21:00	15:00 - 21:00	
ANKE	08:00 - 15:30	09:00 - 18:00	00:00 - 15:30			08:00 - 15:30	08:00 - 15:30	08:00 - 15:30
ANKE	22:45 - 07:00		06:45 - 15:00	06:45 - 15:00				22:45 - 07:00

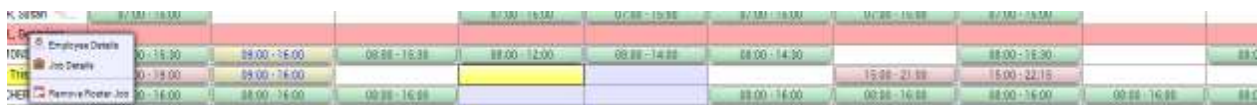
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Removing a Terminated Job from a Working Roster

If an Employee has been terminated, or, an Employee's job has been closed AND, their jobs remain on a Roster, it will be shaded in RED as above.

You need to remove the shifts from this employee, either by:

- Unassigning them to the top of your roster for future reassignment – this can be done either by dragging or copy/paste the shifts;
- Deleting the shifts altogether by right clicking on the employee's name and selecting "Remove Roster Job. This will delete all the shifts for the roster job and employee.



Employee	Shift	Start	End	Status
Employee 1	08:00 - 16:00	08:00	16:00	Active
Employee 2	08:00 - 16:00	08:00	16:00	Active
Employee 3	08:00 - 16:00	08:00	16:00	Terminated (Red)
Employee 4	08:00 - 16:00	08:00	16:00	Active

NB: When transferring the Roster to Payroll, shifts on the terminated job/s will be ignored. In the event that an employee with multiple jobs has one of the jobs terminated, the remaining jobs and shifts will transfer to the Roster.

Switching between Rosters.

How to Navigate from the current roster to the next (or previous) roster - You can simply click on a blank area of the screen and swipe to the left or right of screen to slide from one roster to the next (or previous).

Alternatively, click on the Run number in the middle of the screen, this will bring up a drop-down list and you can select which run number you wish to view.

Note that the date corresponds to the starting date of the period and all master rosters are shown at the top.



TRIOOnline – TriMicro Cloud Rosters

Locking A Roster

In the **Maintenance** fly-out under the “Rosters” option is a list of your current rosters. After the roster name you will see two (2) checkboxes. The left checkbox will only allow employee viewing, whilst the right checkbox locks the roster. Refer to screenshot below.

The screenshot shows the 'Maintenance' interface with a sidebar menu on the left containing 'Rosters', 'Employees', 'Jobs', 'Areas', 'Templates', 'Holidays', and 'Classifications'. The 'Rosters' section is active, displaying a table with columns: Run, Description, State, and Actions. The table lists several rosters, including 'MASTER ROSTER' and 'MASTER ROSTER 2'. For each roster, there are two checkboxes in the 'State' column. Callouts point to these checkboxes: 'Allows Employee viewing via online portal' points to the left checkbox, and 'Locks the Roster' points to the right checkbox.

Run	Description	State	Actions
	MASTER ROSTER	☐ ☐	
	MASTER ROSTER 2	☐ ☐	
24	02/05/2016 - 15/05/2016	☐ ☐	
23	18/04/2016 - 01/05/2016	☒ ☐	
22	04/04/2016 - 17/04/2016	☒ ☒	
21	21/03/2016 - 03/04/2016	☒ ☒	
20	07/03/2016 - 20/03/2016	☒ ☒	
19	22/02/2016 - 06/03/2016	☒ ☒	

Approving & Finalising your fortnightly Working Roster

Select **Maintenance** and then **Rosters**

This screenshot is similar to the previous one but includes additional callouts for the 'Actions' column. The 'Check this to delete the roster' callout points to the delete icon in the 'Actions' column. The other callouts are the same as in the previous screenshot.

Run	Description	State	Actions
	MASTER ROSTER	☐ ☐	
24	02/05/2016 - 15/05/2016	☐ ☐	
23	18/04/2016 - 01/05/2016	☐ ☐	
22	04/04/2016 - 17/04/2016	☒ ☐	
21	21/03/2016 - 03/04/2016	☒ ☒	
20	07/03/2016 - 20/03/2016	☒ ☒	
19	22/02/2016 - 06/03/2016	☒ ☒	

TRIOOnline – TriMicro Cloud Rosters

For each Working Roster you can :

1. Make the roster available for Employees to View (if you utilise the Employee Web Hub)
2. Mark the Roster as Finalised and Locked (if you have the appropriate level of access) – so that it can be transferred to the payroll system
3. Unassign it and form a new Master Roster
4. Delete the Roster

Finalise A Roster

If you intend to import your roster to payroll it will need to be finalised. The right checkbox next to the name of the roster will finalise (and lock the roster if it hasn't been already). This finalisation will trigger a **recalculate**, which will simply check the roster for any unexplained discrepancies from a data standpoint. Once that is done (this can take some time) your roster will be finalised and ready to be imported.

NB: The Roster should only be locked and transferred after all work is complete, including your TimeClock Compare.

Unassigned Shifts

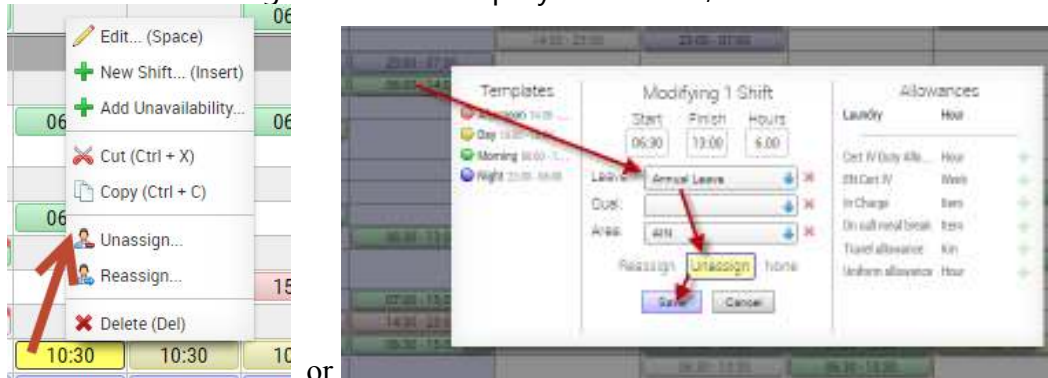
You can UNASSIGN shifts, which then move those shifts to the top section of your roster (above a bold line) – you will notice the classification appears instead of an employee name.

Employee	1: Wed 24/09	2: Thu 25/09	3: Fri 26/09	4: Sat 27/09	5: Sun 28/09	6: Mon 29/09	7: Tue 30/09
AIN - Nursing Assist...	06:30 - 15:00 14:30 - 23:00	06:30 - 15:00	14:30 - 23:00	16:00 - 20:00	14:30 - 20:30 14:30 - 20:30	06:30 - 15:00	06:30 - 15:00 06:30 - 15:00 14:30 - 20:30 14:30 - 20:30
GS01 - General Serv...	06:30 - 14:30		06:30 - 14:30				06:30
GS04 - General Serv...	09:00 - 15:30	09:00 - 15:30				09:00 - 15:30	06:30
BARRY, Elena - NUR...	07:30 - 17:00			10:00 - 16:00	09:30 - 15:30	07:30 - 17:00	07:30
BARRY, Liza - NUR...		06:30 - 15:00				06:30 - 15:00	
BIGTON, Samant...							
BIAN, Bernadett...	12:00 - 16:00	08:30 - 16:30	08:30 - 16:30				
BIAN, Michael MAI...	08:00 - 16:00		08:00 - 16:00			08:00 - 16:00	
CIHARRY, Surendr...	16:00 - 20:00	16:00 - 20:00					
CIR, Tamalimate...	08:00 - 14:30	08:00 - 16:00	08:00 - 16:00			09:00 - 13:00	08:00
DILUZ, Joana AIN			14:30 - 20:30			14:30 - 23:00	23:00
FIMele AINCERT3				23:00 - 07:00	23:00 - 07:00		
FIRALD, Diane G...	06:00 - 14:00			06:00 - 14:00	05:00 - 14:00	06:00 - 14:30	06:00
GIL, Ma Divina AL...			06:30 - 15:00				
HILeen AINCERT3	06:30 - 16:30 17:00 - 20:30		06:30 - 13:00	06:30 - 15:00			
HIDEN, Julie GS...	07:30 - 13:00					06:30 - 14:00	07:30
HILIN, Yasmeen ...	06:30 - 15:00	06:30 - 15:00	07:00 - 15:00				
JANIL, Anna AIN			14:30 - 23:00	06:30 - 13:00		14:30 - 20:30	

TRIOOnline – TriMicro Cloud Rosters

This can be done in a number of ways:

1. Select a shift (or multiple shifts) and right click to select Unassign.
2. Allocate an existing shift on an employee to leave, and select REASSIGN



Once shifts are "Unassigned", they can be Reassigned to an employee at a later date.

NB: The Hours of Unassigned shifts are included in the daily totals at the bottom of the roster. Unassigned shifts will also display on Reports and be included in the total hours.

Some reports allow the option to to exclude Unassigned shifts before generating the report.

Agency Workers

TriOnline has the ability to include AGENCY shifts into your fortnightly rosters.

Once set up, any Agency shifts would appear towards the top section of your roster grid, below any Unassigned Shifts and above the Employee shifts.

Employee	1: Wed 24/09	2: Thu 25/09	3: Fri 26/09	4: Sat 27/09
AIN *Nursing Assista...	06:30 - 15:00 14:30 - 23:00	06:30 - 13:00	14:30 - 23:00	16:00 - 20:00
GS01 *General Servi...	06:30 - 14:30		06:30 - 14:30	
GS04 *General Servi...	09:00 - 15:30	09:00 - 15:30		
ZZ AGENCY, AGENCY ...				
ZZ AGENCY, AGENCY ...				
ZZ AGENCY, AGENCY ...				
B... Flopp, BLO...	07:30 - 17:00			16:00 - 16:00
B... ED, Liza AIN		06:30 - 15:00		
B... STON, Samant...				
B... AN, Bernadett...	12:00 - 16:00	08:30 - 16:30	08:30 - 16:30	
D... Michael MAI...	08:00 - 16:00		08:00 - 16:00	
C... HARY, Surendr...	16:00 - 20:00	16:00 - 20:00		
D... Tamaitimate	08:00 - 14:30	08:00 - 16:00	08:00 - 16:00	

NB. Your payroll personnel need to be involved to set up this functionality.

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This requires the "Agency" to be created as a faux employee in the cloud payroll database.

Payroll will also need to create a separate "Award" in the payroll that covers Agency classifications/conditions, as well as creating Agency "Classifications", which would contain rates you may pay for these staff.

An example in the payroll would be:

PAYROLL EMPLOYEE (FAUX)	AWARD	CLASSIFICATION	
"XYZ AGENCY"	AGENCY AWARD <i>The Award can have</i>	Agency CLEANER Agency LAUNDRY Agency KITCHEN Agency AIN Agency RN ... etc	<i>Each class can be given Shifts, etc and a different pay rate for costing purposes</i>

Once the Agency is added to your requirements, you can ADD the Add to Roster for each classification you have set up in your payroll database.

NB. Multiple Agencies can be entered. If you require costings to match their separate charge out rates, you may need to create a new "Award" and "Classifications" in the payroll for each Agency.

The Hours of Agency shifts are included in the daily totals at the bottom of the roster. Agency shifts will also display on Reports and be included in the total hours. Some reports allow the option to to exclude Agency shifts before generating the report.

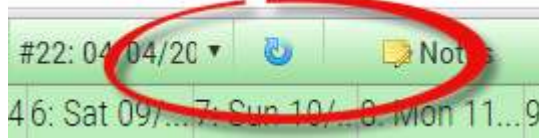
TROUBLESHOOTING

If, for any reason, you feel that your roster is not performing as well as you would expect, you can run a Refresh (F5) of your roster at any time.

This is done periodically by the system itself, but can be done by you at any time.

Before sending through an email with a perceived problem, please try the following options first before contacting the support team at Software North.

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1. Soft Refresh

2. Hard Refresh

Simply place your cursor somewhere on your roster grid and press your F5 button

If this does not seem to resolve your issue, please report the BUG to support@softwarenorth.com.au

Time Clock – Roster Compare

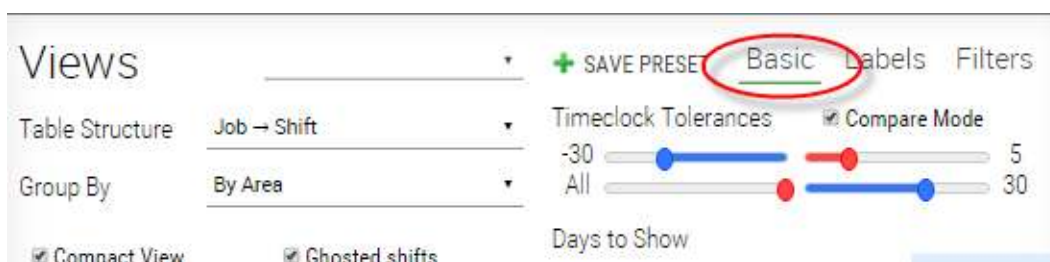
This function is used by those clients who have active Time Clocks installed at their facilities which are networked and automatically uploading information to the Roster on a regular basis.

If your Time Clocks are not networked, refer to the Time Clock Upload Procedure.

You then go straight to the Roster Compare Tab, as per Step 2 below.

You do not have to action the Roster Compare straight away, you can refresh your roster and come back at any future time to complete, access via the following steps:

1. To set your start and finish time tolerances for rostered shifts, click on Filters then the Basic tab.



The above example shows that you will ignore:

- Any employee who clocked in more than 30 minutes earlier than their rostered start time for that shift
- Any employee who clocked in more than 5 minutes later than the rostered start time for that shift

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- Any employee who clocked out 0 minutes earlier than the rostered start time for that shift
- Any employee who clocked out more than 5 minutes later than the rostered start time for that shift

NOTE: These tolerances will show as the default that you have set, but these can be changed temporarily or reset by using the sliders.

2. Select '*Shift Time Compare*' view from the dropdown list next to Filters.



3. We then recommend to run and/or print this *Shift Time Compare* report. You can then commence the verification and reconciliation process for the exceptions that are listed on your screen.

To make the changes immediately

4. The Screen Roster will now only show roster times where the clockings are outside the times you have specified.
 - Blue is greater time than required
 - Red is less time than required
 - Ghosted means it is a time within the tolerances
 - '?' is no clocking's



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5. To change the Roster times

- Right click and select Reconcile, then click on the rostered times
- Both Rostered (R) will select both roster times
- Both Clockings (C) will select both clocking times

Reconcile brings up the following screen (*custom times shown are for example purposes only*)

Edit Shift CHRISTNER, Carrie - Day #10 - *Re..
Shift
Clock
Costs
Notes

	Start	Finish
Rostered	☒ 06:30	☒ 15:00
Clocking	☐ ?	☐ ?
Custom	☐ XX:XX	☐ XX:XX

Optional description of reconciliation

Reconcile Clockings

As you verify each exception, they will disappear from your screen, leaving only a list of the remaining exceptions.

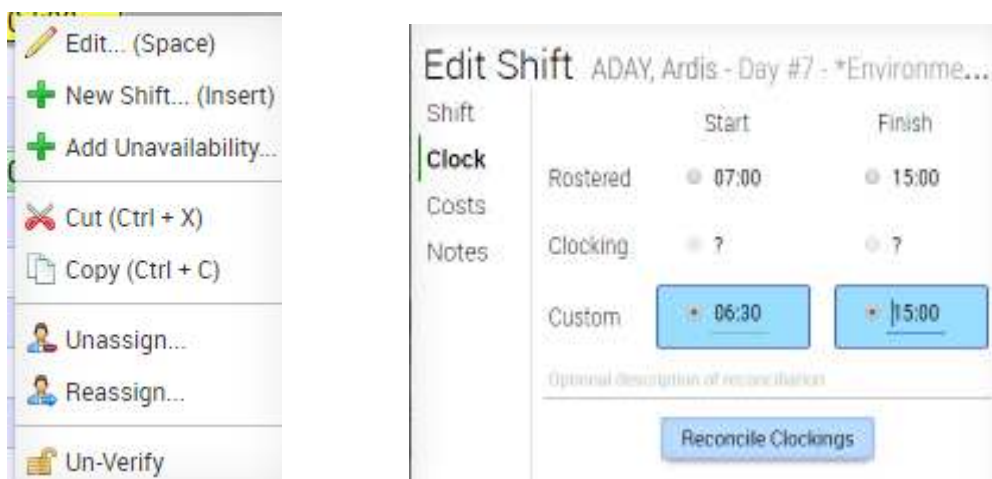
Clearing Verifications (editing Reconciled Shifts)

To clear a verification, select Default – Job view on the menu, then select the relevant employee and shift.

You can either:

- right click on the shift, select Edit at the top of the fly out, then clock and amend the hours worked in the custom field if different than rostered hours and also place a comment if required, then click on reconcile clocking, this will save any changes made, or

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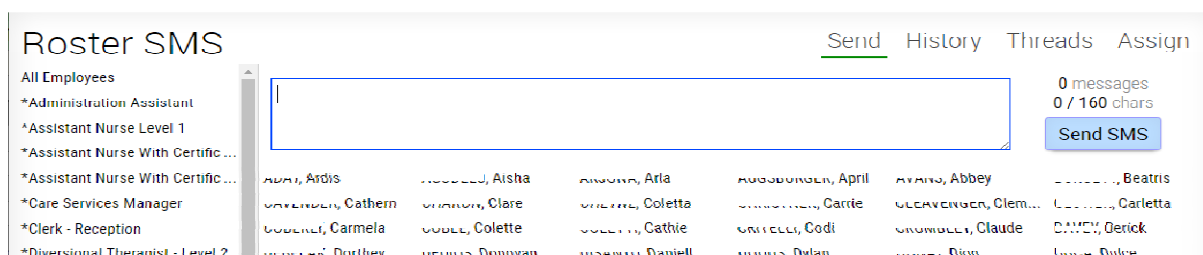
- click on Un-Verify, the shift can now be amended. You can now either go back into the Shift Time Compare View (as per step 2) and amend/reconcile, or right click as per above.

Both of which will allow further editing and will require the shift to be reconciled once more.

SMS Messaging your Employees

Send SMS tab

This function allows you to send SMS messages to your employees, requesting their availabilities for certain shifts.



When you first click on SMS in the top bar, a fly out it will show the list of all employees who have a MOBILE number. For obvious reasons, those without a mobile number will not display.

At all times, only those employees with a mobile number in their records are included in your list.

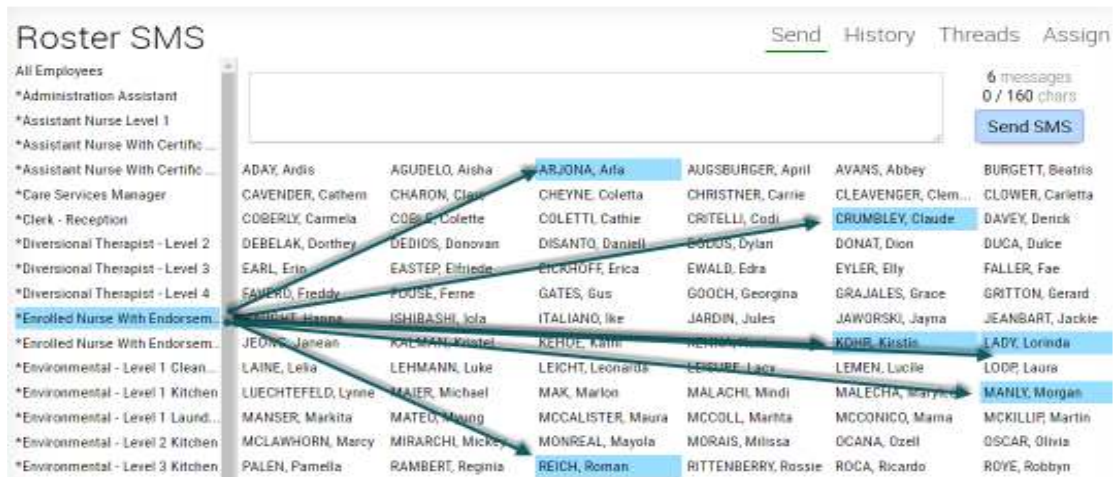
You can then filter to include employees by their classification, using the list on the left hand side.

By selecting the classification, the names of employees with that classification are automatically selected.

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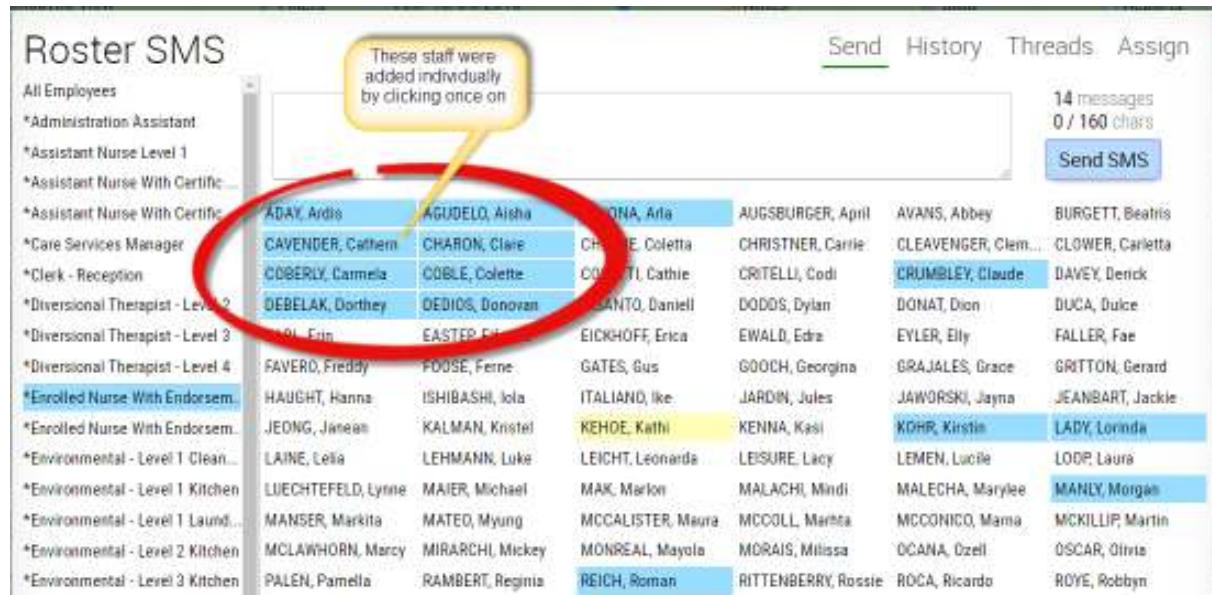
Refer to the 1st screenshot below where one classification was selected, which highlighted six employees who will receive an SMS.

Screenshot 1



Additionally, you can then add extra SMS recipients by simply clicking on their name, refer to the second screen shot below, where 8 further names were selected as possible recipients.

Screenshot 2



Once you have finalised your list of possible SMS recipients, you can type your message into the box at the top of screen (limited to 160 characters).

Once you are ready to send the message to your selected/intended recipients, you select Send SMS and a confirmation message will appear, confirming the amount you will be charged for utilising this service. Responses are able to be sent back to you, currently as notifications.

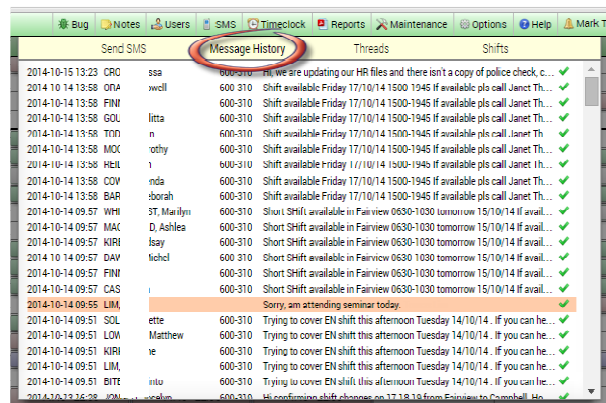
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History tab

This tab shows the history of all messages sent out to each employee.

The green tick on the right hand side indicates that it was successfully sent to the recipient.

If it is not ticked, it may indicate that the number you have in your records is no longer a valid mobile number.



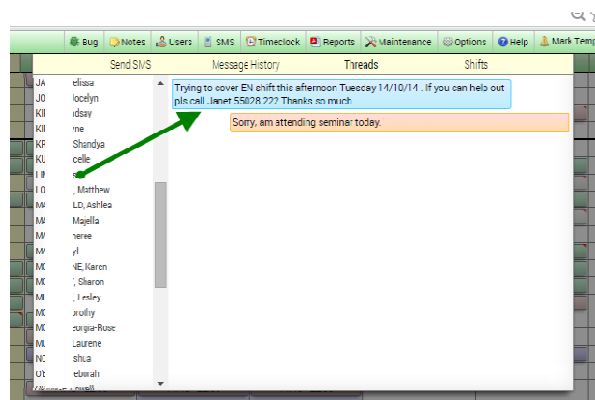
Threads tab

This tab shows the message threads for each individual employee.

Simply select the name from the left hand side list, and you will see the SMS threads (messages sent and received) from that employee.

Messages Sent are left justified

Messages Received are right justified

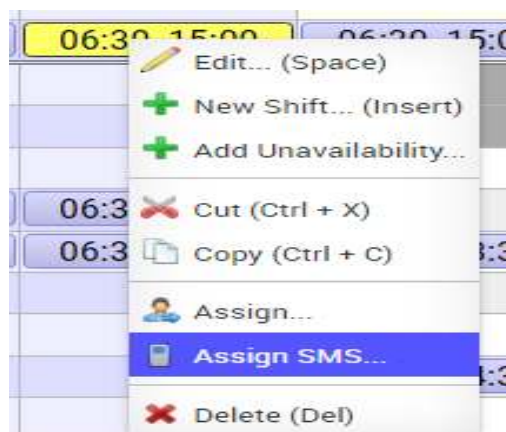


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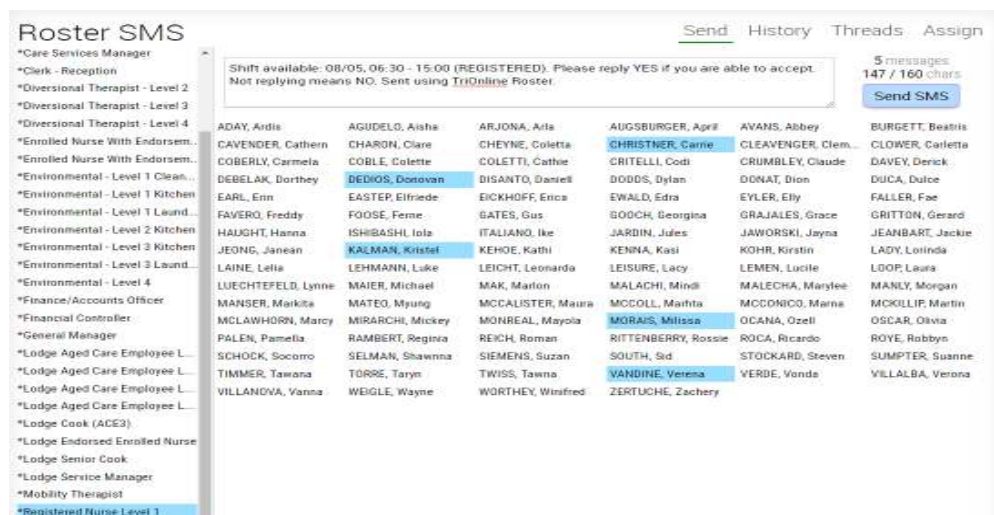
Shifts tab

There is now the ability to right-click on an unassigned shift and activate the “Assign SMS” (refer to screenshot 1) feature which automatically creates a fly-out which selects employees with the relevant classification ie Registered Nurse Level 1 (refer to screenshot 2) and pre-fills that shift details, therefore you only need to either select/unselect additional names, then click on “Send SMS”

Screenshot 1



Screenshot 2



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Reports

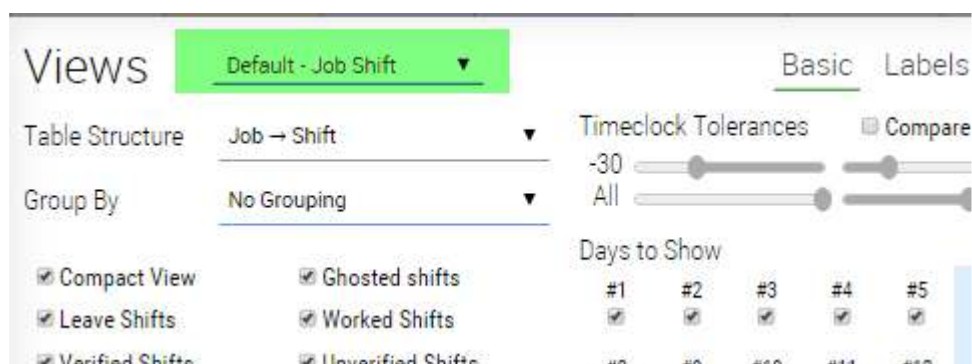
Roster views

The Reports/Views that can be built and customised for displaying the Roster information are extremely flexible. All these views can then be saved as your own customised views for future use.

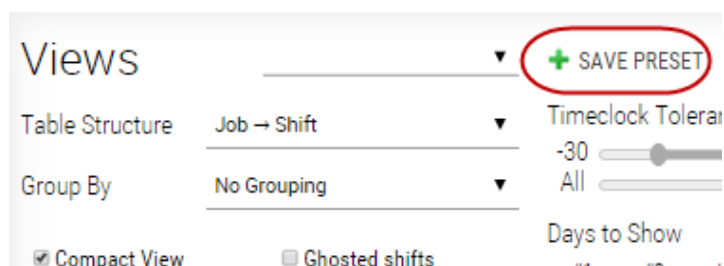
To build your own customised Roster reports, select Filters and then work your way through the detail listed below.

To Create a new Report

Ensure you are in Edit Views

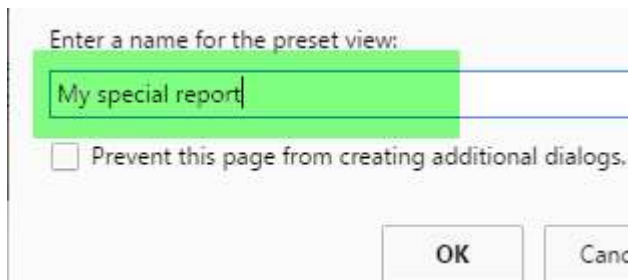


Once you start changing any of the settings (described below in more detail), the 'Save Preset' button will appear. Click on this if you want to save this format for ongoing use.....



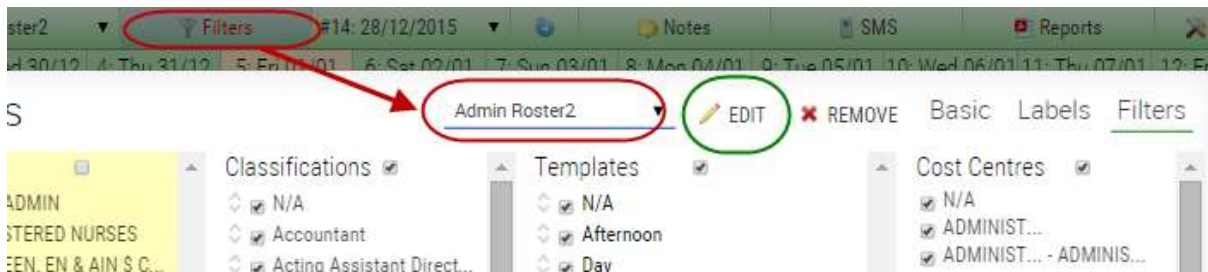
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.....and enter the name for this report.



To change a pre-existing report view

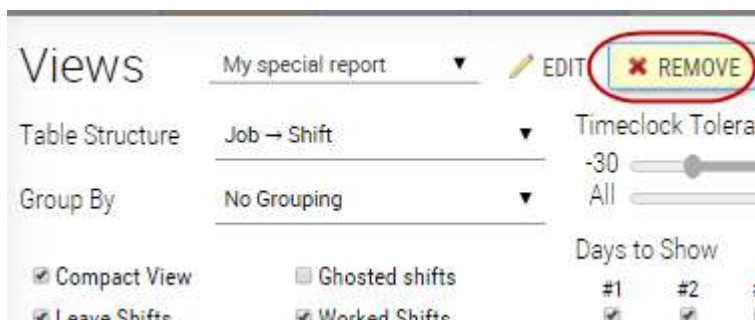
Select the report that you are wanting to change from the dropdown



Click edit – make the changes you require – then 'Save'.

To Delete a report

Select the Report that you want to Delete and click on the 'Remove' button. You will be prompted to confirm that you want to remove this report.



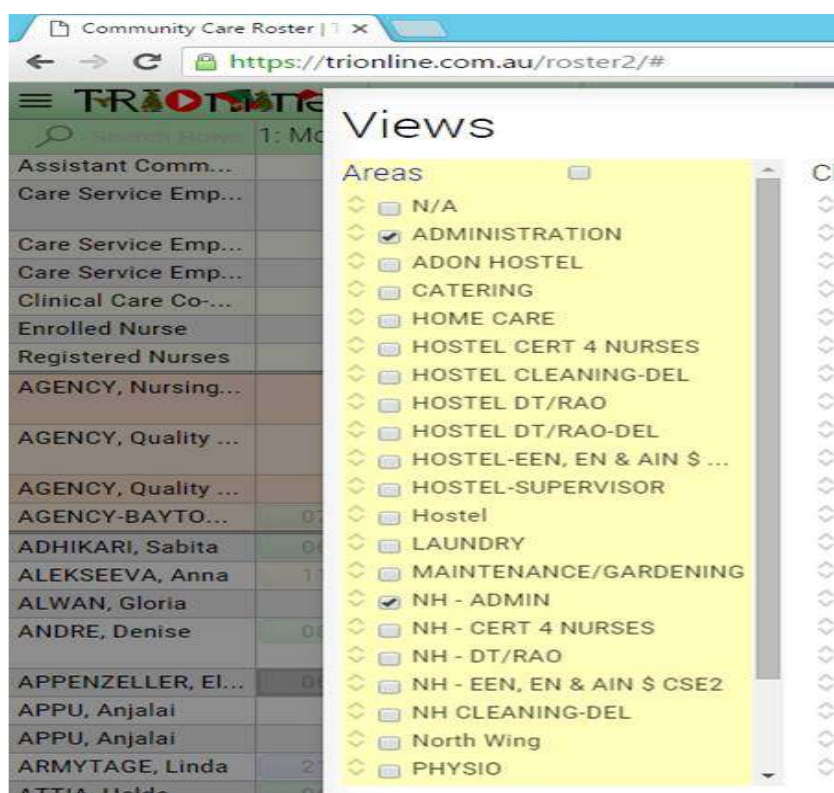
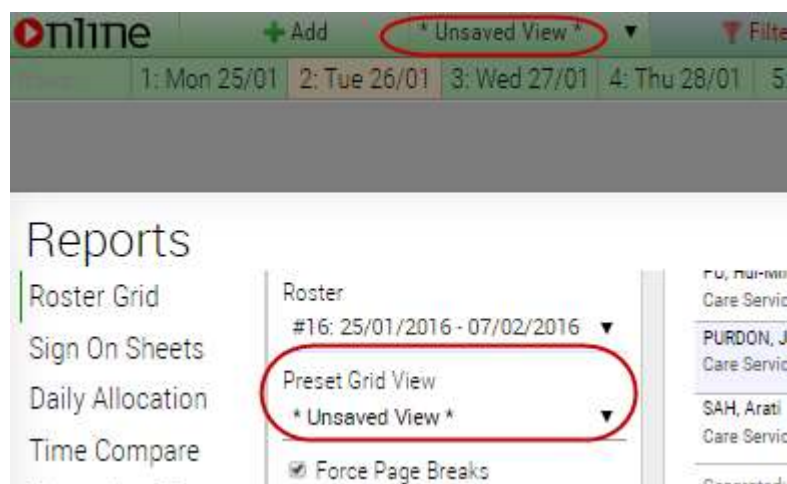
How to Create a Report as a one off

It is important to understand that the report layouts that you save or print are based on what you have built on the screen first.

So if you just need a report for a one off situation, and you don't want to keep it for future use, you do the following:

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1. Design your layout/filters/views on the screen
2. BY doing this, the default name of this report will change to *Unsaved View*
3. You can then go to the Reports menu and on Preset Grid View select the report called *Unsaved View*



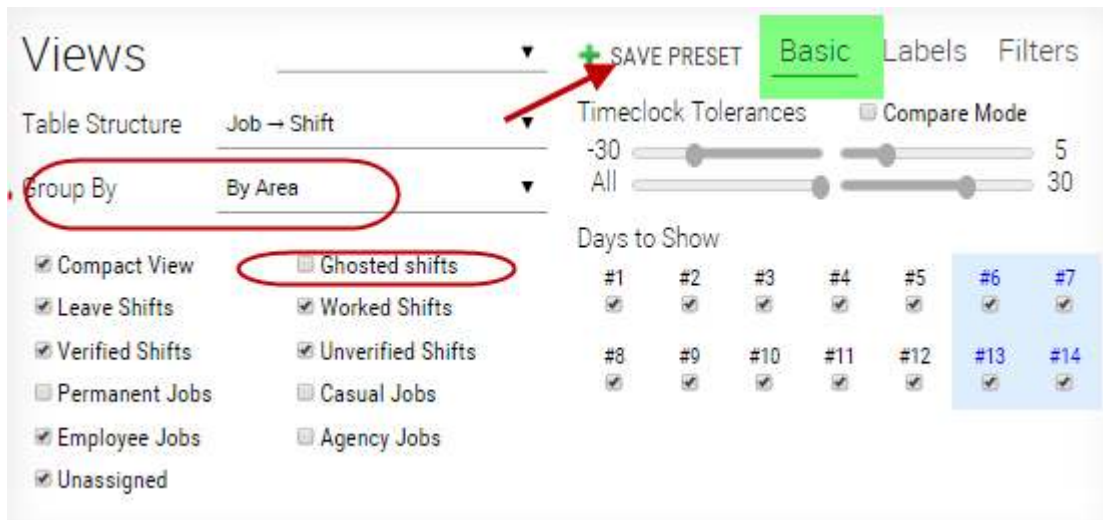
Question: Somehow I can't set the filters for specific locations (eg Admin & NH Admin).

Answer: With the new roster, you set up your own views/reports and save them so that they are there for future use.

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So in this case, you need to

1. Go into filter and select the areas that you want
2. Go to the 'Basic' tab, and Group by Area and untick Ghosted shifts
3. Then tick 'Save preset' and give it a name so that it is there for future use.



Other Reports

Other reports are selected by going to **Reports** near top right corner of screen and selecting the relevant roster.

1. Roster Grid

You are able to select Roster Grid by the Roster, the Preset Grid View and also if you would like colour on your report by different areas or shifts.

2. Roster Compare

The intention of this report compare, is that you are able to compare a Master and Working roster which will highlight and display any variances in red.

Area	MASTER ROSTER	Working ROSTER	Var	Tolerance	Overtime	Diff	All	Other	Zone
ADAMS	118.00	118.00	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	281.25	281.25	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	291.25	291.25	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	192.50	192.50	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	136.50	136.50	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	237.25	237.25	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	51.00	51.00	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	387.25	387.25	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	288.75	288.75	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	222.50	222.50	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	46.00	46.00	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	492.19	492.19	0.00	0.00	0.00	0.00	0.00	0.00	
ADAMS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Total Hours	2912.50	2912.50	0.00	0.00	0.00	0.00	0.00	0.00	

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3. Sign-On Sheets

This report provides a list of all employee shifts and can be printed off on a daily basis or for a number of days.

The screenshot shows the 'Sign-On Sheets' report interface. On the left is a sidebar with navigation links: Reports, Roster Grid, Roster Compare, Sign On Sheets (selected), Daily Allocation, Time Compare, Exceptions Report, Overtime, TC Employees, Staff Replacement, and Empl Schedule. The main area displays the report for 'Roster #22: 04/04/2016 - 17/04/2016'. It includes filters for 'Days' (04, 05, 06, 07, 08, 09, 10), 'Group By' (None), and 'Sort By' (Classification). A list of checkboxes allows users to toggle various display options: Break Between Groups, Fill with Blank Rows, Show Changes Grid, Show Area (vs Classification), Show All Columns, Show Unassigned, and Show Leave Shifts. A note states: 'Note: this report will use your current filter settings, under the view fly-out. Click to update filters.' Below the note are 'Save' and 'Queue' buttons. The main data table is titled 'Sign-On Sheets - All' and 'TriMicro Test Facility' for 'Monday, 04/04/2016'. It has columns for EMPLOYEE, CLASSIFICATION, START, FINISH, MEAL, HRS, and SIGNATURE. The table lists 20 employees with their respective shift details.

EMPLOYEE	CLASSIFICATION	START	FINISH	MEAL	HRS	SIGNATURE
GELLER, Gisel	*Administration Asst...	06:00	16:30	0.50	8.00	
WHITESHELL, Willie	*Assistant Nurse With ...	06:30	14:00	0.50	7.00	
CHEYNE, Colette	*Assistant Nurse With ...	22:45	06:30	0.50	7.25	
MALECHA, Marylee	*Assistant Nurse With ...	06:30	15:00	0.50	8.00	
PALEN, Pamela	*Assistant Nurse Level 1	15:00	19:45	0.00	4.75	
LIMING, Lashell	*Assistant Nurse Level 1	23:59	05:30	0.50	6.02	
VELLE, Yurika	*Assistant Nurse With ...	06:30	14:00	0.50	7.00	
CLOWER, Carletta	*Assistant Nurse Level 1	15:00	19:45	0.00	4.75	
MAK, Marlon	*Assistant Nurse With ...	14:30	21:45	0.50	6.75	
RITTENBERRY, Roscoe	*Assistant Nurse With ...	14:45	23:00	0.50	7.75	
LAME, Lella	*Assistant Nurse With ...	22:45	06:30	0.50	7.25	
CLEAVINGER, Clemmie	*Assistant Nurse With ...	06:30	15:00	0.50	8.00	
VERDE, Vonda	*Environmental - Level ...	06:00	14:00	0.50	7.50	
KEHOE, Keith	*Environmental - Level ...	06:00	14:00	0.50	5.50	
SIEMENS, Susan	*Environmental - Level ...	06:00	14:00	0.50	7.50	
HEWETT, Hedy	*Assistant Nurse With ...	06:30	15:00	0.50	8.00	
BOOCH, Georgina	*Assistant Nurse With ...	06:30	13:30	0.50	6.50	
OCANA, Ozell	*Dimensional Therapist ...	10:30	17:30	0.50	6.50	
EARL, Erin	*Assistant Nurse With ...	22:45	06:30	0.50	7.25	
OSORNO, Olin	*Assistant Nurse Level 1	14:45	23:00	0.50	7.75	
TIMMED, Tawana	*Assistant Nurse With ...	06:30	14:00	0.50	7.00	

4. Daily Allocation

Shows a daily snapshot split by Roster Area – basically a condensed version of your daily roster. You must select which day/s to include, report will split each day on a separate page. You can toggle on/off to show leave shifts.

The screenshot shows the 'Daily Allocation' report interface. The sidebar is identical to the previous screenshot. The main area displays the report for 'Roster #22: 04/04/2016 - 17/04/2016'. It includes filters for 'Days' (04, 05, 06, 07, 08, 09, 10) and 'Sort By' (Employee Name). A list of checkboxes allows users to toggle display options: Show Unassigned and Show Leave Shifts. A note states: 'Note: this report will use your current filter settings, under the view fly-out. Click to update filters.' Below the note are 'Save' and 'Queue' buttons. The main data table is titled 'Daily Allocation Report' and 'TriMicro Test Facility'. It is split into two columns. The left column lists employees under various roster areas: ADMIN (GELLER, Gisel), ADMIN (WHITESHELL, Willie), ADMIN (CHEYNE, Colette), ADMIN (MALECHA, Marylee), ADMIN (PALEN, Pamela), ADMIN (WHITESHELL, Willie), NOVD (*Unassigned*), NOVD (*Unassigned*), NOVD (CLOWER, Carletta), NOVD (LIMING, Lashell), NOVD (VELLE, Yurika). The right column lists employees under various roster areas: DT (OCANA, Ozell), DT (EARL, Erin), DT (OSORNO, Olin), DT (TAWANA, Tawana), NOVD (MAK, Marlon), KITCHEN (CUTLER, Carletta), KITCHEN (*Unassigned*). Each entry includes the employee name, classification, start, finish, meal, and hours.

ADMIN	DT
GELLER, Gisel	OCANA, Ozell
WHITESHELL, Willie	EARL, Erin
CHEYNE, Colette	OSORNO, Olin
MALECHA, Marylee	TAWANA, Tawana
PALEN, Pamela	MAK, Marlon
WHITESHELL, Willie	CUTLER, Carletta
*Unassigned	*Unassigned
*Unassigned	
CLOWER, Carletta	
LIMING, Lashell	
VELLE, Yurika	

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5. Time Compare – for clients with Timeclocks

Shows all timeclock data that does not match the rostered shifts, according to your chosen comparison tolerances.

You are also able to group by area, classification and shift template.

The “Day Range” option is useful, so as you do not replicate information you have already dealt with for prior days – if only one day is required for the report, you need to select Day Range of 12-12 for Day 12 only.

The screenshot shows the 'Reports' sidebar on the left with 'Time Compare' selected. The main panel displays the 'Time Compare - Default - Job Shift - All' report for 'TriMicro Test Facility' on 04/04/2016. The report includes a table with columns: Day, Start, End, Hrs, Start, End, Description / Final, and Verification User / Comments. The data is grouped by employee: APPERSON, Aloha - 77; ATHEY, Annee - 318; and AUGHURST, April - 447. Each employee's data is shown for days 04, 05, 06, 07, 08, 09, 10, 11, 12, and 14. The table shows 'No Coverings' for all entries. Below the table, there are 'Save' and 'Queue' buttons.

6. Exceptions Report

Shows such things as Leave, Split shifts on the same day (with hours in brackets for Broken Shifts), Overtime, and Training as some examples.

This report is particularly useful for :

- a) Ensuring all leave forms are entered
- b) Looking at split or broken shifts
- c) Giving to your payroll at the time of transfer, to ensure they enter all leave entries correctly

The screenshot shows the 'Reports' sidebar on the left with 'Exceptions Report' selected. The main panel displays the 'Roster Exceptions Report' for 'TriMicro Test Facility' on 04/04/2016. The report includes a table with columns: Employee, Date, Start, End, Hrs, Description / Final, and Verification User / Comments. The data is grouped by employee: ADAY, Ardis (#102) KITCHEN, Environmental - Level 1 Kitchen; BURGETT, Beatrix (#10) KITCHEN, Environmental - Level 1 K.; and VELLE, Yuriko (#500) ANS, Assistant Nurse With Certificate L... Each employee's data is shown for days 10, 11, 12, 13, 14, and 17. The table shows various exceptions such as 'Annual Leave', 'Training', and 'Assistant Nurse With Certificate L...'. Below the table, there are 'Save' and 'Queue' buttons.

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7. Overtime Report

What this does is highlight employees and shifts that MIGHT require overtime to be allocated to the shift or some part of it. At no stage, does our roster automatically allocate overtime, as it is unknown if the extra hours were authorised or not. If any Overtime is required, it requires a manual allocation on the shift by your roster staff.

The screenshot shows the 'Overtime' report configuration screen. On the left, a sidebar lists various reports, with 'Overtime' highlighted. The main panel is titled 'Reports Overtime Report' and shows configuration options for 'Hours Threshold' (set to 76), 'Days Threshold' (set to 10), and 'Hours Per Day' (set to 10). Below these settings, there is a note: 'Note: this report will also show overtime when settings under the new format. Click to update filters.' At the bottom, there are 'Save' and 'Cancel' buttons. The main table area is empty, with headers for 'Hours', 'Days', and 'Long Days'.

There are three criteria:

- .1 The number of hours worked in the fortnight:
 - o defaults to 76 hours (if an ADO employee, this will effectively be 80 hours / paid only 76)
- .2 The number of days worked in the fortnight
 - o defaults to 10 days (some client's agreements require an 11th day to be overtime)
- .3 The number of hours worked in a day
 - o defaults to 10 hours (some client's agreements require overtime after a certain number of hours worked in a day)

The report combines all shifts for an employee in the one roster (ie. if an employee has more than one active job in your roster, it will combine all together). However, it will NOT include any shifts worked at other facilities, as they are on separate rosters.

Additionally, if some hours or split shifts have been already allocated as overtime, these are excluded from the counts.

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This report is included to cover a large range of different overtime conditions to satisfy all our clients who operate on different awards/enterprise agreements, many of which have different overtime requirements. It is not specific for any one client. Therefore, this report is intended as a guide only, you and your facilities can utilise it to the best of your requirements.

8. TC Employees Report

This is a simple report which shows the:

- Employee Code (Payroll number)
- Timeclock ID
- Employee name
- Phone
- Mobile

This report can be sorted by Name, Employee Code or Timeclock ID.

9. Staff Replacement Report

This report provides a list of employees who have been replaced and can be printed off for a single day or for a number of days.

10. Employee Schedule

This report can be printed either by individual employee or all employees. It provides a list of shift details. As per the Staff Replacement report, the filters can be changed.

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Scheduled Leave

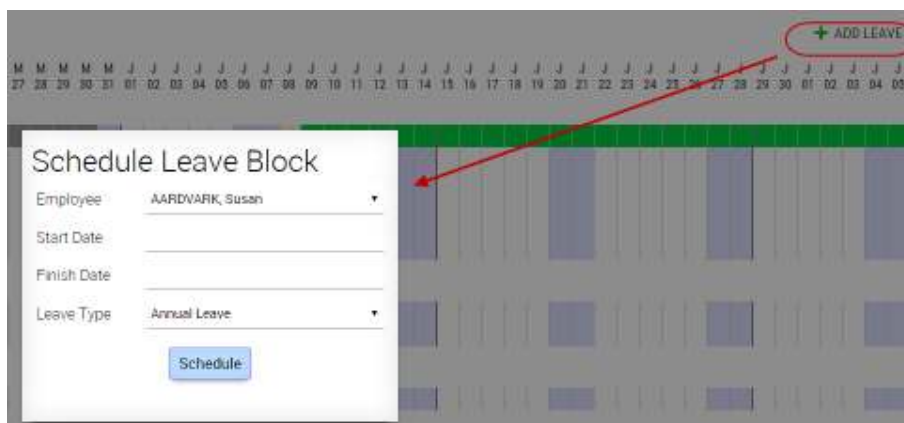
Scheduled Leave can be set up 2 ways:

1. From Leave Applications submitted by staff
2. Directly by the Roster manager

To enter leave directly, select “Scheduled Leave” from the Leave menu. This will show you what leave is already approved (green) and what leave has been requested but not yet approved (grey)



Click on the 'Add leave' button and this will give you a fly-out form to be filled. Then click on 'Schedule' to add the person to the Scheduled leave form.



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For SCHEDULED LEAVE to automatically transfer to a working roster.

1. When you create a new working roster for an upcoming payrun (refer section "Create a New Roster), any leave entered will be transferred to the relevant roster.
2. If a working roster has already been created, any new dates of scheduled leave will not transfer into the working roster. Therefore, in this case, you would be best to enter the leave directly into your Working Roster that has already been created.

NB. If you create too many future Working Rosters in advance, it reduces the effectiveness of using the Scheduled Leave functionality.

Importing Roster into TriWinPay

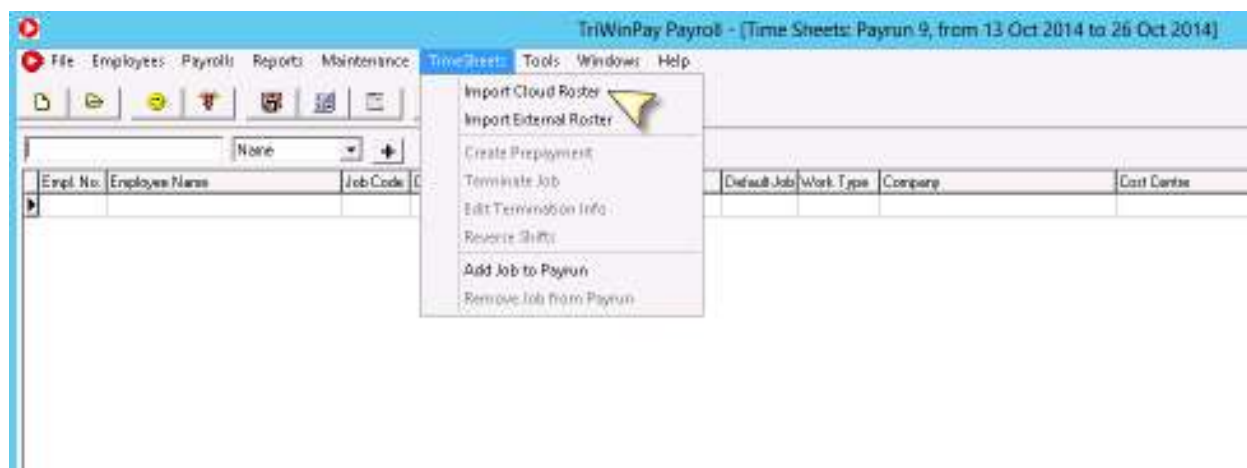
If you only have roster access, you need to inform your payroll staff when your roster is ready for them to transfer to the payroll.

Those with the relevant level of access are required to mark the roster as Finalised and Locked (see previous page).

Once the fortnightly roster is marked as finalised and locked, your payroll staff can import the roster directly into the "cloud" payroll. They will have been provided with information on how to access the payroll in the "cloud" environment.

Once they are in the payroll, they open up the timesheets form (Payroll → Input Timesheets) and then select from the top menu - Timesheets → Import Cloud Roster.

Note: The TimeSheets Menu is only available when the TimeSheets Form is open.



TRIOOnline – TriMicro Cloud Rosters

The entire roster is then imported and ready for any amendments to be made in the payroll.

Ensure that all annual leave and long service is entered, as this does not transfer automatically through from the roster to the payroll due to the individual nature of these payments.