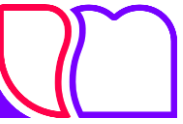# Lunchtime Learners

June 2023

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Agenda

1. Exchange

2. Administrator Roles, Types & Permissions

3. Annual Leave Configuration (People+)

4. New Functionality

1. Exchange

What is the exchange and how do I turn it on?

This allows your staff to swap, deposit & pick-up shifts and can be managed between themselves or with admin approval.

The exchange can be switched on/off per rota group and is configured in Rota Settings.

Approve or automate shift swapping

⟳ Setting the exchange type to approved means that once the two members of staff have agreed what shifts to swap, an administrator will need to review and approve this.

☑ Setting the exchange type to direct means that the shifts are automatically swapped, once both members of staff have agreed which shifts to offer each other.

1. Exchange

Depositing

⬇ This is where a member of staff offers their shift to be picked up, without the expectation of receiving a shift in return.

Swapping

🤝 This is where a member of staff will offer a shift that they no longer can or wish to work, and another member of staff offers one of their shifts in return.

Who works the shift?

📅 Until the swap or deposit is agreed by staff – and approved by admin if configured – whomever the shift belonged to originally is still expected to work that shift.

2. Administrator Roles, Types & Permissions

There are three administrator <u>roles</u>...

🥇 System Administrator - full access to add; edit & view <u>everything</u> across all Rota Groups

🥈 Local Administrator – full access to add; edit & view <u>everything</u> for specified Rota Groups

🥉 User – configurable access to either add; edit or view each part of RotaMaster

There are also four <u>types</u> of administrator accounts...

🖩 RotaMaster Only – Access to RotaMaster and not the Admin Hub

👥 Staff Hub Only– Access to the Admin Hub and not RotaMaster

🔁 Both – Access to both RotaMaster and the Admin Hub

⏰ T&A Only – Access to sign into the Time & Attendance App (Attendance+)

2. Administrator Roles, Types & Permissions

Permission	Role Type	System Administrator		Local Administrator		User	
		RotaMaster	Admin Hub	RotaMaster	Admin Hub	RotaMaster	Admin Hub
Super User Permissions — Edit locked shifts/adjustments — Edit locked expenses/mileage claims — Delete/unlock manually locked shifts/adjustments Can only be granted by someone currently with that permission.		✅	❌	✅	❌	✅	❌
Bank+ Permissions — Control access to edit & publish shifts created by other users		❌	✅	❌	✅	❌	✅
Rota Group Permissions — Grant or remove access to rota groups		❌	❌	✅	✅	✅	✅
Staff Hub Permissions — Edit or Read Only access to each section of the Admin Hub		❌	❌	❌	❌	❌	✅
Rota Permissions — Edit or Read Only access to each section of RotaMaster		❌	❌	❌	❌	❌	✅

Annual Leave Configuration (People+)

What does it do?

Annual leave configuration automates the calculation of annual leave allowances for your staff...

🌴 Pro-rata annual leave for staff working less than full time

🌴 Pro-rata annual leave for staff starting / leaving part way through an annual leave year

🌴 Automatic allowance for length of service

🌴 Automatic allowance for Bank Holidays

🌴 Re-calculate allowance when working hours change

How does it work?

Based on your whole time equivalent (WTE), designating an allowance, if relevant, a tier for length of service and handling of Bank Holidays; the configuration can then be allocated to each Post.

5. New Functionality

➕ Add Shift Adjustments in bulk

There is now the option to add shifts adjustments in bulk from the View Rota screen, simply select multiple shifts by holding CTRL on your keyboard and press the new Bulk Add Shift Adjustments icon.

✉ Email Multiple Payroll Runs

It is now possible to select multiple payroll runs within a Rota Group and email these out to staff. Hold CTRL on your keyboard, select your payroll runs then select the email icon.

5. New Functionality

+ Add Staff to Multiple Rota Groups

There is now the option to add everyone within one Rota Group to one or more, additional Rota Groups. Simply click the Bulk Update icon in Personnel Manager and select the Rota Group(s) you'd like to add staff to.

⬆ Export Proposed Allocation

You can now export the list of reasons why someone was not allocated to a shift if you would like a record of these reasons when running the Allocation Wizard.

🔔 Notification for Contract Amendments (People+)

There is a new notification available for when a staff member's contract is amended.

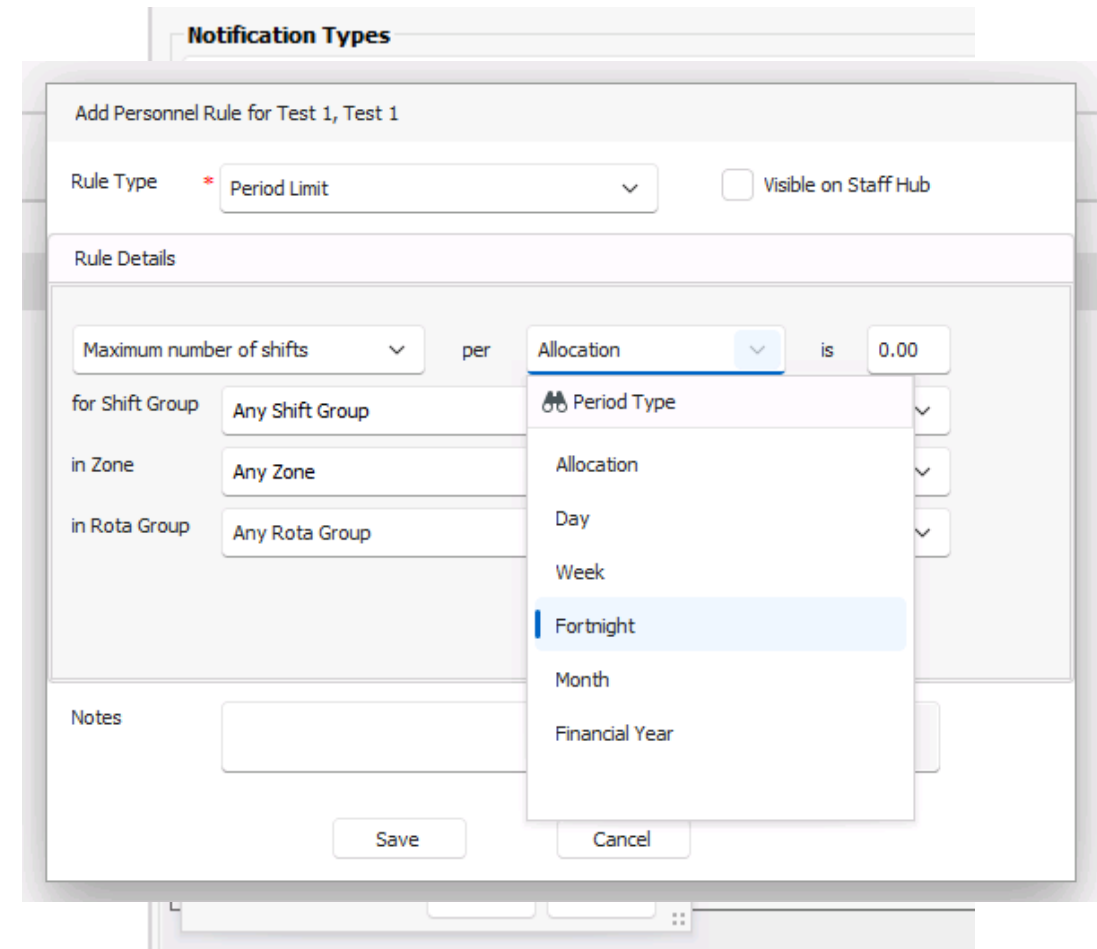# 5. New Functionality

🔔 Set-up notifications per Rota Group

When setting up notifications, you are now able to specific different triggers & recipients for your different Rota Groups.

📐 Configure Rules per Fortnight

There is now the option to select fortnight when creating Period Limit rules.

▨ User Defined Controls – Report 544

This report is now available to all customers and permission to run this report can be granted in the Rota Permissions screen.

Thank you