



Getting started with RosterMatic

Trialling your own roster is the best way to become familiar with RosterMatic. You can do this for **FREE** and will only take you a few minutes.

Once you have set up your trial Roster on Rostermatic.com just follow these simple steps and you are on the way to creating your own rostering system.

Use the left-side admin menu to access all the setup functions.

Sample Records

There's no need to delete the sample records, simply edit and replace the details with your own. That way you'll quickly see how the calendars look with your own data.

1. Staff

- Edit or add staff here. The **bold** headings signify compulsory fields. We recommend that first you change the sample names to your own staff, then add any extra staff.

2. Locations

- Add your locations, or change the sample ones as necessary.

3. Job Titles

- Add your job titles, or change the sample jobs as necessary.

4. Shift Names

- Add all your shift permutations, or change the sample jobs as necessary.

5. Working Parameters

- For each person you may set the locations, jobs and shifts that they are able/qualified/willing to do.

6. Minimum Levels

- Go to **Minimum Levels** and set up the minimum staffing for each day of the week. (Further help is found on that page.)

7. Filling the rota in the Weekly display.

This screen most closely resembles how people make rosters by hand.

- Click on the **Weekly** Tab.
- Click the **Refresh** button. The staff required based on minimum levels not been filled will show.
- Click on any of these to fill them.
- *Further help is found on that page.*

8. Filling the roster from the Calendar display.

Go to the Calendar by clicking **Calendar** (or you can click on the RosterMatic logo).

- Click on the date/number in any day within the Calendar.
- That will take you to the **Day Edit** page.
- The staff are grouped according to the working status. You'll find most in the 'Available' group.
- Click on a staff name.
- Use the drop down lists to choose the person's location, job and shift.
- Click on Update, then repeat for other staff.
- *Further help can be found on that page.*

9. Broadcast the roster to staff

Even if you have only completed part of the roster you should try the **Broadcast** feature. If an employee's email address is blank the email will be sent to you.

- Check that the *Settled date* (the date in the future you will broadcast to.)
- To change the *Settled date*, click on a date in the calendar, you'll see the option to change the Settled Date there.
- Choose **Broadcast Rota** from the left hand side menu.
- Follow the program's instruction, it will tell you what it thinks you need to do.
- Click on the **Broadcast Now** button.

After the emails and SMS's are broadcasted, the header will display the broadcasted date and the calendar will colour code those broadcasted days.

Where to go from here...

- Explore the pages on this site and read the advice text on each page. If you need any assistance, email us at admin@rostermatic.com



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