Rosters

foundU
people operations platform for

RIVERINA
Roster Process

1. ROSTER PREP
   - Employees accepted and available. Employment type, positions and locations applied.

2. CREATE ROSTER & ADD SHIFTS
   - Add shifts and employees to roster calendar based on positions. Copy roster week to week.

3. ASSIGN/OFFER SHIFTS
   - Publish: Employees notified of assignment/offer and can view live roster in portal.

4. APPROVE SHIFTS/TIMESHEETS
   - Employees submit timesheets (unless clocking in/out). Managers approve shifts/ timesheets.
Login

1. Go to: riverina.foundu.com.au

2. Enter your email address and password to login to the Operations Portal.

3. If you have forgotten or need to reset click Forgot Password. Check your inbox and follow the prompts to update your password.
Accessing Rosters

Go to **Work, Rosters. Click All Rosters.**
Rosters Overview

This is a high-level overview of all of your rosters, number of shifts, staff and issues that may need addressing.
1. Select the week start date for the roster from the calendar.
2. Use the check boxes to select the rosters you wish to view.
3. Click View Roster.
Change Roster View

If you wish you can filter the rosters, locations, positions and shift status' you want to view using the Filter.
Add Employee to Roster

To add an employee to the roster for the week:
1. Click in the box under Name.
2. Type in the search box to search for an employee.
3. Select an employee or multiple employees and click Add.

Please note: Your roster is in draft mode until you Publish.
Add Shifts

Alternatively you can add a shift before adding an employee:
1. Click + on a specific day to add a shift.
2. Enter all the shift details: Start/End Time and Date, Break, Location, Employee and Position.
3. Click Create.
Copy & Paste Shifts

1. Click on the shift added and click **Copy**.
2. Click on all the days to copy the shift to and click **Save**.

<table>
<thead>
<tr>
<th>Tue 23/01</th>
<th>Wed 24/01</th>
<th>Thu 25/01</th>
<th>Fri 26/01</th>
<th>Sat 27/01</th>
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<tbody>
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<td>Pasted Shift</td>
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<td>7:00am - 3:00pm Customer Service</td>
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</tbody>
</table>
Edit Shifts

To edit a shift:

1. Click on the shift and click the **Edit** icon.
2. Make your adjustments and click **Save**.
Bulk Delete Shifts

1. Hold down **Shift** and click on all the shifts you want to delete.
2. Click **Delete Shifts**, and **Delete** to confirm.
Shift Errors

Red shifts are errors.

This means you cannot assign or offer the shift to an employee due to an error such as they are unavailable to work or a position has not been set.

If you publish the roster, shifts with errors will not be sent out.

To view and edit all errors click Shift Errors at the top of the roster.
Shift Warnings

Yellow shifts are warnings.

This means you can still assign the shift to an employee but there may be conflicts such as the employee's last shift was less than 10 hours ago.

When you publish the roster, these shifts will still be sent out.
Shift Status

8:00am - 2:....
Great Service...

Not published / assigned / offered / filled.

10:00am - ...
Great Service...

Warning. E.g. Conflicting shift.
Can still publish.

10:00am - ...
Good Food S...

Error. E.g. Position type not set.
Cannot publish.

9:00am - 3:....
Great Service...

Offered.
Not yet accepted.

9:00am - 5:....
Production ...

Employee On Leave.
Can still publish.

7:00am - 3:....
Graphic Design...

Publish / Assigned / Accepted Offer.
Accumulative Hours, Times & Duration

Under the employee name, view their accumulative hours for the week.

Under Tools use **Toggle Hours/ Shift Times** to view times or hours duration per shift.
Publishing Shifts

Until you publish a roster, it is in draft mode. When you are ready to publish the roster, click Publish Rosters. You have 3 publishing options:

**Publish**: Roster is live in Employee Portals. If you have email messages turned on, an email will be sent to employees.

**Publish & Send SMS**: Roster is live in employee portal and employee is sent an SMS with their upcoming shifts.

**Send Offer SMS**: Employee is sent an SMS asking if they’d like to accept the shift.

Once it is published, if you make changes to the roster click Publish Changes. This will update only those affected by the changes.
Re-Assign Shifts

To re-assign a shift to a different day or employee:
1. Click on the shift and **Drag and Drop** to the new day and/or employee.
2. Click **Edit** on the shift to make any adjustments. Click **Save**.
3. Click **Publish**, and choose your publishing method to make the change live. Only the people affected by the changes will be notified.
Copy Roster

You can copy any previous roster into any week to use as a template.

1. Go into the roster week you wish to copy and click **Copy Roster**.
2. **Select the new week** to copy to from the calendar or choose **Copy to Next Week**, and click **Copy Roster**.

**Tip:** Use the Filter to choose which roster you want to copy to a future week.
Roster View: Employee Portal

Employees can easily see their roster from their Dashboard as soon as they log into their employee portal. They will also receive an email if this is turned on, and an SMS of their upcoming shifts if you choose the option when publishing.
GETTING HELP

Check the online help: foundu.zendesk.com