

OnTime Rostering 1.0 Quickstart guide

Introduction

OnTime is a Rostering and Timekeeping solution for Retailers and other small businesses. The Rostering module allows scheduling of employees to shifts across multiple branches and departments.

Shifts are generated according to rules which specify the requirements at each Branch and Departments within the Branch. Departments can require certain skills for staff.

Staff can be allocated to the Shifts, based on a priority and their skills.

OnTime Rostering can make automatic allocation of staff, which can then be fine-tuned manually. Rosters can be produced for each branch.

OnTime Timekeeping is used to record work times and planned vacations of employees at each Branch. This information is then synchronized with the Rostering database. With this information, rosters can take in to account planned vacations, and make comparative reports of estimated vs actual times for payroll.

This Quickstart Guide covers only the Rostering module.

Pre-requisites

The Windows Installer will work with Windows 2000, XP or Vista.

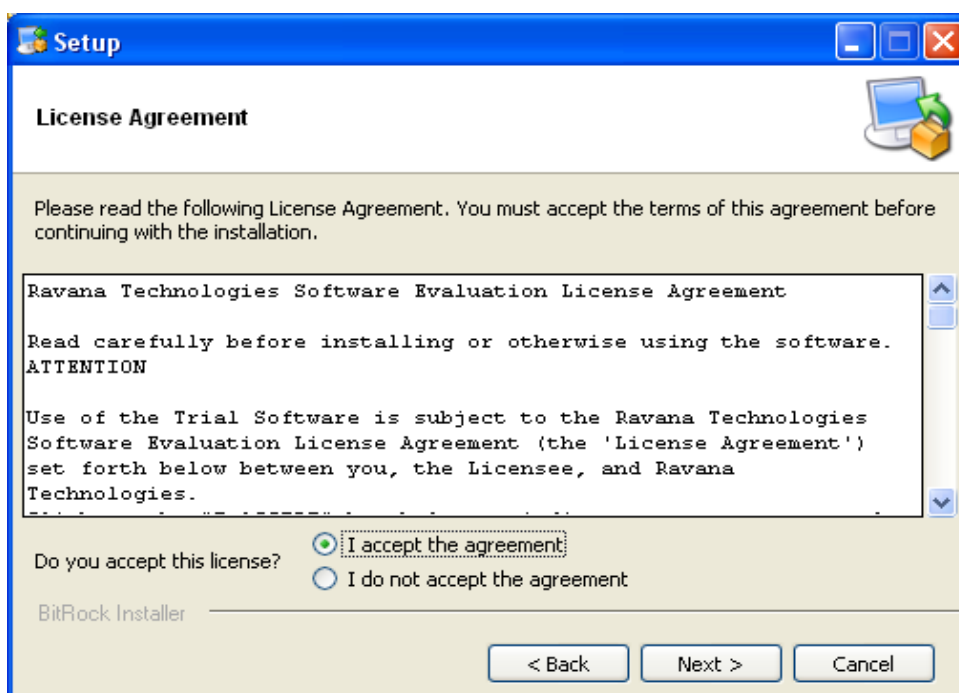
Java Runtime Environment (JRE) or Java Development Kit (JDK) Version 1.6 or later must be installed. You can download the latest JRE from www.java.com.

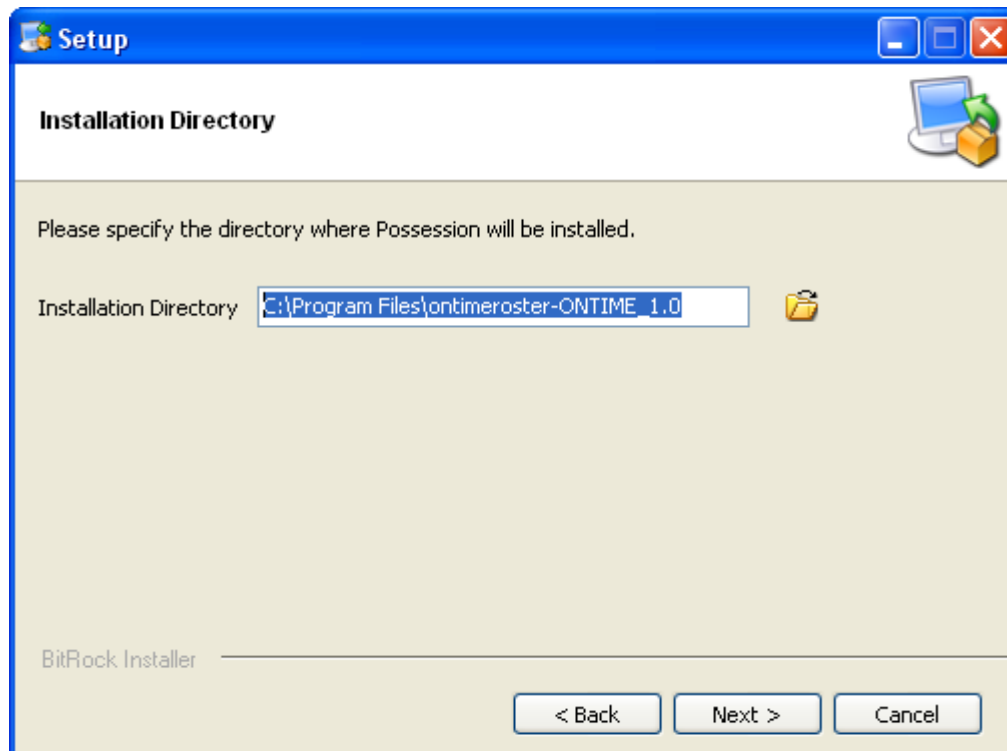
Installation

The Evaluation Version 1.0 Windows Installer for OnTime Rostering can be downloaded from the Ravana Technologies website.

NOTE: The Windows installer allows you to rapidly get familiar with OnTime functionality. It includes an embedded HSQL database instance. For production use or testing with OnTime Timekeeping, we recommend using Postgres.

After downloading, double click the installer to start the process. Accept the license agreement and choose an installation directory.

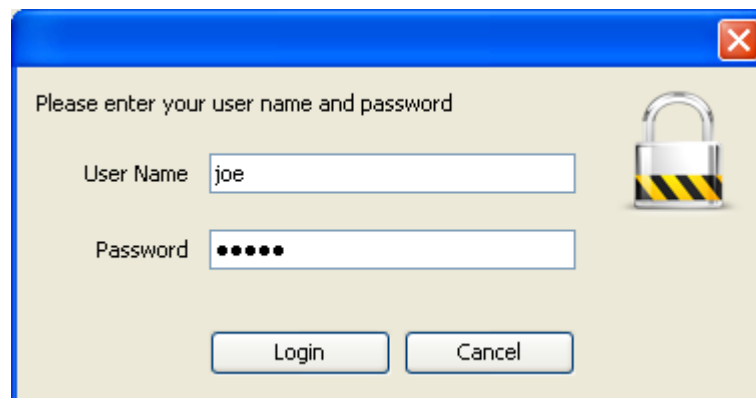




The Windows installer will create an installation of OnTime on the chosen directory, and a shortcut on the Windows Start menu, under the folder Possession.

Start OnTime Rostering using the *Menu Start > All Programs > Possession > OnTime Roster*

You will get the log-in screen. Login with the user name *joe* and password *admin*.



You will get the Application Screen, with the Menu on the left and Main Area on the right. Under the Settings and Org Structure menus you will find menu items to create various data items before you start using the planning function using Plan menu.

Evaluation Data

The Evaluation version comes with some basic master data built in. You will have two Branches, Two Departments in each Branch (Sales and Pharmacy) and Two Employees (one with Pharmacist skills and one with Sales skills). You can browse this data under the Org Structure menu.

The start and end times of the shifts can be seen from the time scale. There is only one Shift each day, except on Friday, when there are two Shifts. This is specified in the Shift Rules.

There are two numbers printed on each shift. The first is the number of Employees allocated to the Shift. The second is the number of Employees required for the Shift. Initially there are no employees allocated. The requirement is 1 Employee for each Shift – this can also be changed in the Shift Rules.

Now click the Auto Allocate button.

Allocations				Mon,23/03/09	Tue,24/03/09	Wed,25/03/09	Thu,26/03/09	Fri,27/03/09	Sat,28/03/09	Sun,29/03/09
	Name	Hours	\$Cost	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18
	Pharmacy			1/1	1/1	1/1	1/1	1/1 0/1	1/1	1/1
	Sales			1/1	1/1	1/1	1/1	1/1 0/1	1/1	1/1
	Jane Doe	56	1,960.00							
	John Smith	56	1,400.00							

You will see that Jane Doe gets allocated to Pharmacy shifts and John Smith gets allocated to Sales.

There are no allocations to the second Shift on Friday, because it will create a clash. But you can force an allocation – click the Drag Mode button, and drag the Shift diagram to an Employee Row.

Allocations				Mon,23/03/09	Tue,24/03/09	Wed,25/03/09	Thu,26/03/09	Fri,27/03/09	Sat,28/03/09	Sun,29/03/09
	Name	Hours	\$Cost	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18
	Pharmacy			1/1	1/1	1/1	1/1	1/1 0/1	1/1	1/1
	Sales			1/1	1/1	1/1	1/1	1/1 0/1	1/1	1/1
	Jane Doe	63	2,205.00					1/1		
	John Smith	56	1,400.00							

You can delete Allocations or Shifts. Click the Select Mode button, select a Shift or an Allocation, and press the Delete key.

You can save the current set of Shifts and Allocations. If you click Revert, changes will be cancelled and the last set of saved Shifts and Allocations will be loaded.

Now you can print a roster using the Print Roster button.

Shift Rules

Shifts are generated using rules defined under *Settings > Shift Rules*.

These can be customised to generate different Shifts by day, Branch or Department. The number of staff needed can also be varied by these properties.

The initial rules are shown below. There are two sections – the top section provides the rule selection criteria, which specifies which rule should be fired depending on the day, or Branch or Department. The bottom section lists the rules.

The rule selection criteria and rules are defined using the Javascript language. With the

combination of selection criteria and rules, you can come up with sophisticated Shift Generation rules.

SHIFT_RULES [Save] [Revert]

Rule Selection Logic

```
if (today.getDay() == 5)
  rule = 'LONG_DAY';
else
  rule = 'DEFAULT_SHIFTS';
```

Rules

- DEFAULT_SHIFTS
- LONG_DAY**

[Add] [Remove]

Rule Logic

```
shifts.add('DAY', 1);
shifts.add('AFTERNOON', 1);
```

The Rule selection criteria selects the rule LONG_DAY for Friday, and DEFAULT_SHIFTS for all other days.

The rule LONG_DAY rule (shown above) creates two Shifts, 'DAY' with 1 employee required, and 'AFTERNOON' with 1 employee required. The DEFAULT_SHIFTS rule creates only one ('DAY') Shift.

The 'DAY' and 'AFTERNOON' shifts, and their start time and duration are defined under *Settings > Shifts*.

The variables *day*, *branch* and *department* are accessible in the selection criteria and rules, allowing you to generate different types of Shifts with different Employee requirements.

Lets start with a simple change – say for the Dubai branch you want to create two shifts each day for each Branch, with two Employees required. We can change the selection criteria and add a new rule, as shown below. To add a new rule, click the Add button and provide a unique name (in this case DUBAI_RULES). After making the changes, click Save.

SHIFT_RULES Save Revert

Rule Selection Logic

```

if (branch == 'Dubai')
  rule = 'DUBAI_SHIFTS';
else
  rule = 'DEFAULT_SHIFTS';

```

Rules

- DEFAULT_SHIFTS
- LONG_DAY
- DUBAI_SHIFTS

Rule Logic

```

shifts.add('D&Y', 2);
shifts.add('AFTERNOON', 2);

```

Add Remove

Now if you generate shifts, you will see the difference.

Allocations				Mon,23/03/09	Tue,24/03/09	Wed,25/03/09	Thu,26/03/09	Fri,27/03/09	Sat,28/03/09
Name	Hours	\$Cost		06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18
● Pharmacy				0/2 0/2	0/2 0/2	0/2 0/2	0/2 0/2	0/2 0/2	0/2 0/2
● Sales				0/2 0/2	0/2 0/2	0/2 0/2	0/2 0/2	0/2 0/2	0/2 0/2
● Jane Doe	0.00	\$0.00							
● John Smith	0.00	\$0.00							

You can also specify that you need only one Employee for the Pharmacy shifts, and for the afternoon Sales shifts, as shown below.

SHIFT_RULES Save Revert

Rule Selection Logic

```

if (branch == 'Dubai')
    rule = 'DUBAI_SHIFTS';
else
    rule = 'DEFAULT_SHIFTS';

```

Rules

- DEFAULT_SHIFTS
- DUBAI_SHIFTS
- LONG_DAY

Rule Logic

```






if (department == 'Pharmacy')
    shifts.add('DAY', 1);
else
    shifts.add('DAY', 2);
shifts.add('AFTERNOON', 1);



```

Add Remove

The resulting generated shifts are shown below. Ofcourse you may now need to create more Employees to satisfy the requirements.

Week: 26/03/09 Branch: Dubai

Allocations				Mon, 23/03/09	Tue, 24/03/09	Wed, 25/03/09	Thu, 26/03/09	Fri, 27/03/09	Sat, 28/03/09	Sun, 29/03/09
Name	Hours	\$Cost		06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18	06 12 18
Pharmacy				0/1 0/1	0/1 0/1	0/1 0/1	0/1 0/1	0/1 0/1	0/1 0/1	0/1 0/1
Sales				0/2 0/1	0/2 0/1	0/2 0/1	0/2 0/1	0/2 0/1	0/2 0/1	0/2 0/1
Jane Doe	0.00	\$0.00								
John Smith	0.00	\$0.00								

This concludes the brief introduction to OnTime. Please contact your sales representative for more details on OnTime Rostering and OnTime Timekeeping integration.