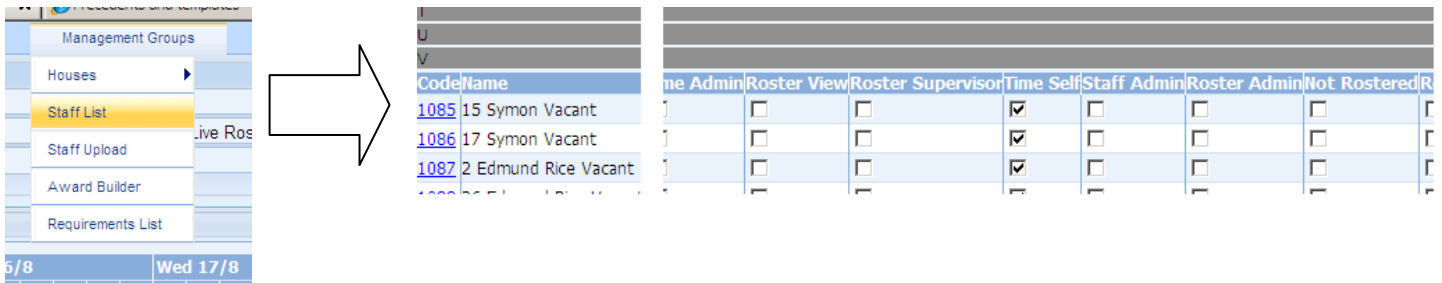


## How do I add a new staff member into RosterCoster? (N.b. you need to have certain permissions to do this.)

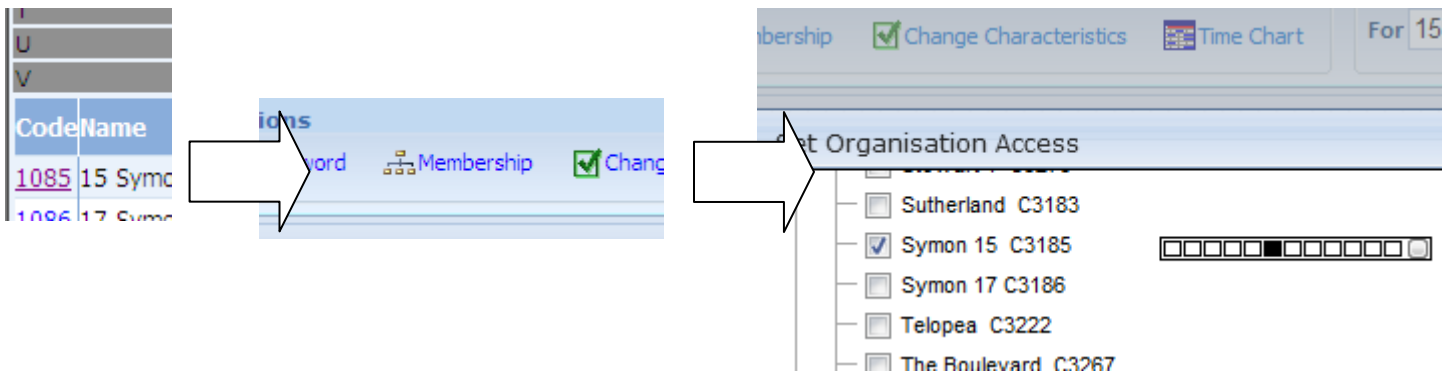
First, without actually doing anything, let's just have a look at the screens we will be using. Visit [www.RosterCoster.com](http://www.RosterCoster.com) and login at the top right hand corner. Then, click Management Groups > Staff List to bring up the GENERAL PERMISSIONS SCREEN (see below).



The screenshot shows the 'Management Groups' menu with 'Staff List' highlighted. An arrow points to a table of staff members with the following data:

Code	Name	Time Admin	Roster View	Roster Supervisor	Time Self	Staff Admin	Roster Admin	Not Rostered
1085	15 Symon Vacant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1086	17 Symon Vacant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1087	2 Edmund Rice Vacant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next, have a look at a staff member's HOUSE BY HOUSE PERMISSIONS SCREEN (see below).



The screenshot shows the 'HOUSE BY HOUSE PERMISSIONS SCREEN' for a staff member. It includes a table of houses and a list of permissions. The table shows:

Code	Name
1085	15 Symon
1086	17 Symon

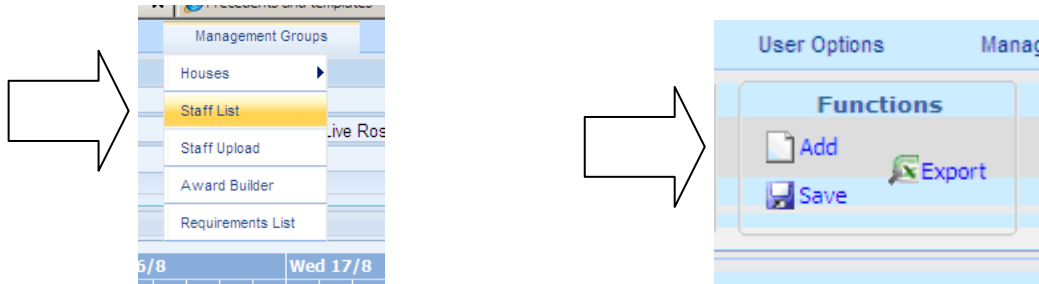
The permissions list includes:

- Sutherland C3183
- Symon 15 C3185
- Symon 17 C3186
- Telopea C3222
- The Boulevard C3267

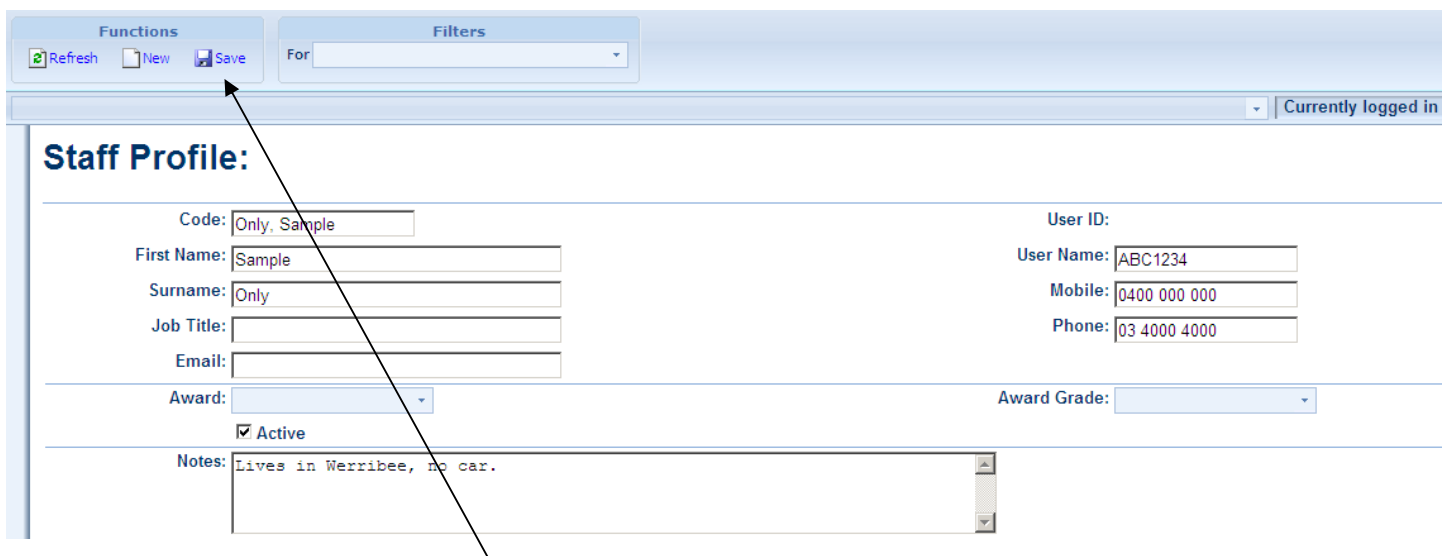
OK ... let's go. But one **very** handy tip before we start: If you add a new staff member, and don't immediately give that person membership to your organisation, you will kill your own access to that person (in which case, email [RosterCoster@gmail.com](mailto:RosterCoster@gmail.com) and we'll bring him or her back for you.)

## STEP 1: ADD A NEW STAFF MEMBER

Press 'Staff List' the 'Add':



Fill in at least the amount of information below.

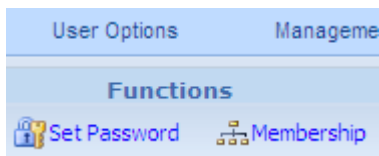


The screenshot shows the 'Staff Profile' form. The 'Functions' panel at the top left has 'Save' highlighted. The form fields include:

- Code: Only, Sample
- First Name: Sample
- Surname: Only
- Job Title:
- Email:
- Award: (dropdown)
- Active:
- Notes: Lives in Werribee, no car.
- User ID:
- User Name: ABC1234
- Mobile: 0400 000 000
- Phone: 03 4000 4000
- Award Grade: (dropdown)

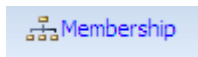
Then press 'Save' near the top of the screen.

Then ... **immediately, before you forget**, give that person 'Membership' to your organisation, and give that person a password, using the two links below (which appeared as soon as you pressed 'Save'):

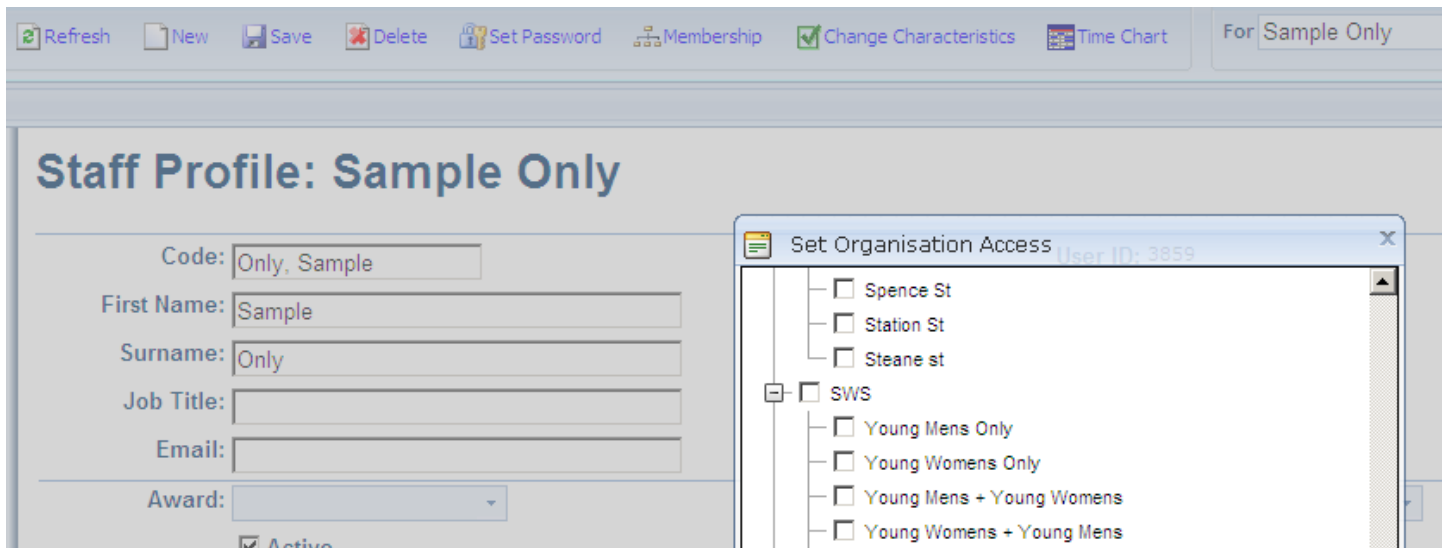


Please now go to the next page for some handy tips when giving people 'Membership' to your organisation.

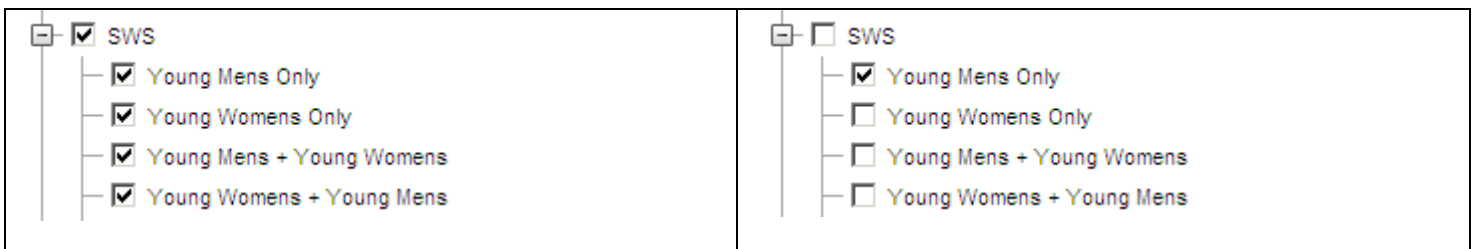
Click this:



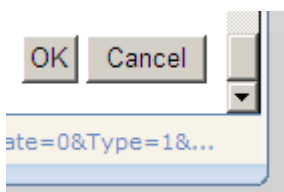
To bring up this:



Put a tick in every unit or house that the manager or staff member will be allowed to work in or 'see'. For example, in the example above, the manager of organisation 'SWS' would have the left hand side ticked, but a staff member that works in 'Young Mens Unit' but is not allowed to work in 'Young Women's Unit' would have the right hand side ticked:



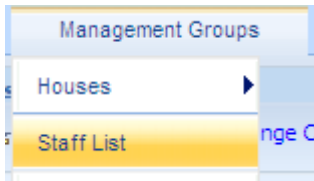
Now, don't forget to scroll down and press 'OK'! (this saves the above ticks...)



OK. It is safe to visit other screens now: this person will not disappear from your screens when you next visit RosterCoster, because he or she now **exists** in at least one location in your organisation.

Now that the staff member **exists**, you need to give him permissions to 'do things' like 'log availability'.

Revisit the main 'Staff List' screen, the one that you started off in



You will notice that he has a little red exclamation mark next to his name, just to warn you that there are no permissions 'ticks' next to his name (yet!) either in this screen or any other screen.

3859 !	Sample Only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Let's assume the person does not fill shifts. Put a 'tick' against the column 'Time Self', as shown below.

Roster View	Roster Supervisor	Time Self	Staff Admin	Roster Admin
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK, that's it. Done!

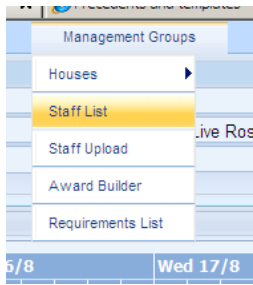
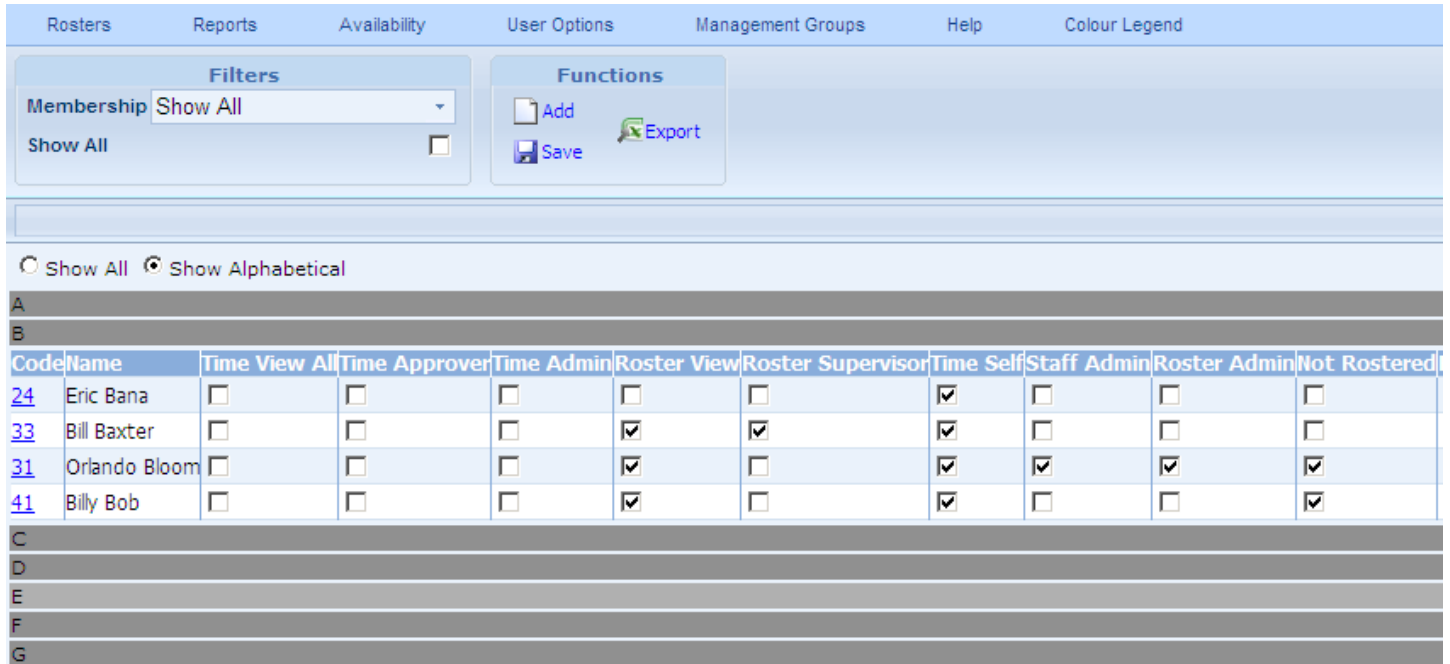
**OK. Time now to see the various types of permissions a person can have.**

**Because a manager fills shifts but does not do them, and a casual does shifts but does not fill them.**

**A supervisor, on the other hand, fills shifts AND does them!**

## STEP 2: HOW TO USE THE GENERAL PERMISSIONS SCREEN

Also known as the 'Staff List' screen:

The screenshot shows the 'Staff List' interface with the following elements:

- Navigation tabs: Rosters, Reports, Availability, User Options, Management Groups, Help, Colour Legend
- Filters: Membership (Show All), Show All checkbox
- Functions: Add, Save, Export
- Sorting: Show All (selected), Show Alphabetical
- Table with columns: Code, Name, Time View All, Time Approver, Time Admin, Roster View, Roster Supervisor, Time Self, Staff Admin, Roster Admin, Not Rostered

Code	Name	Time View All	Time Approver	Time Admin	Roster View	Roster Supervisor	Time Self	Staff Admin	Roster Admin	Not Rostered
<a href="#">24</a>	Eric Bana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">33</a>	Bill Baxter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">31</a>	Orlando Bloom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">41</a>	Billy Bob	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

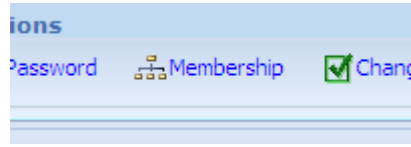
In the example above:

- Eric Bana is a staff member who does extra hours or casual shifts, but does not replace shifts. That is, the only thing he can do is log his availability.
- Bill Baxter is a supervisor, or a staff member who is allowed to replace shifts. Bill ALSO does extra hours himself, from time to time.
- Orlando Bloom is a manager (or he might be 'admin'). He does NOT do shifts ('Not Rostered'). He can, however, control staff permissions ('Staff Admin'), and he can replace shifts ('Roster Admin').
- Billy Bob is a CEO or a Finance Manager who does not do shifts, and does not control staff permissions. But he does like to get in from time to time just to have a look ('Roster View').

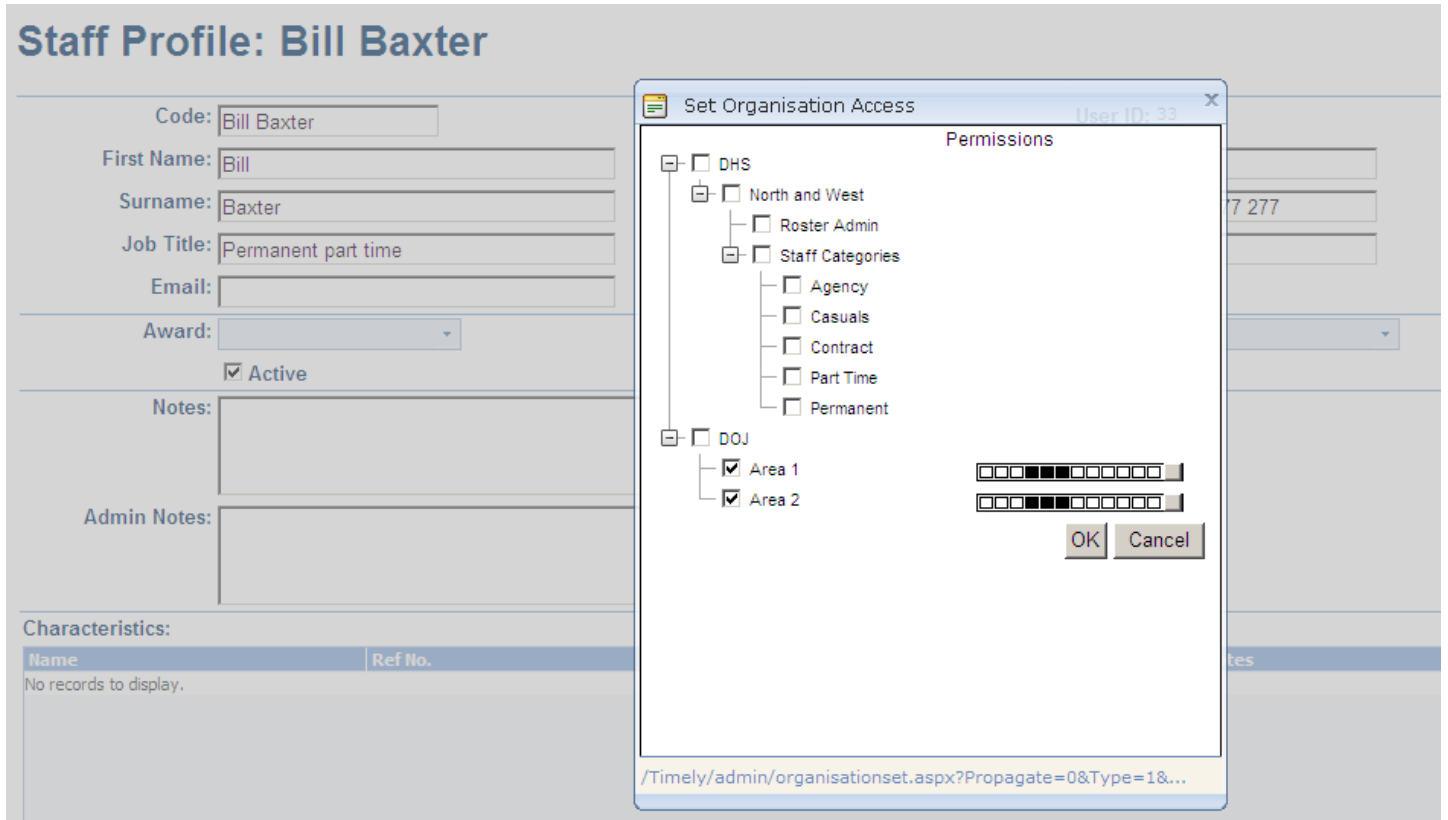
By the way, there is a hierarchy built into the software. If Orlando locks a shift, neither Bill nor Eric can change it. And if Bill locks a shift, Eric can't change it.

## HOW TO USE THE HOUSE BY HOUSE PERMISSIONS SCREEN

I clicked on Bill Baxter's ID number (it was [33](#); see previous page), then hit the link called ...



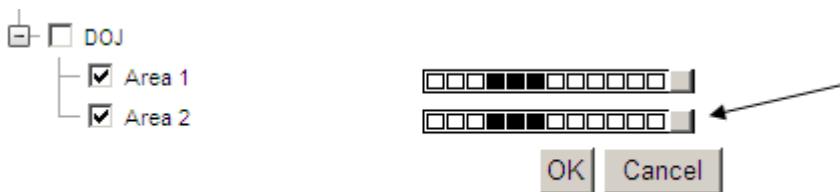
And this is what I saw:



Yes, Bill Baxter has access to two work sites, namely, 'Area 1' and 'Area 2'. By default, he has three levels of permission (see the three little black boxes), and these match exactly the ticks in his GENERAL PERMISSIONS SCREEN (see previous page). But here's the thing:

- Bill is a regular staff member permitted to fill shifts in 'Area 1'; BUT...
- In 'Area 2', I want Bill to pick up extra shifts here and there, but to NOT be allowed to fill shifts.

OK, here's what you do: first, click on the tiny little grey box for 'Area 2' as shown below:



This brings up the **HOUSE BY HOUSE PERMISSIONS SCREEN** as follows:

## Staff Profile: Bill Baxter

Code:	<input type="text" value="Bill Baxter"/>
First Name:	<input type="text" value="Bill"/>
Surname:	<input type="text" value="Baxter"/>
Job Title:	<input type="text" value="Permanent part time"/>
Email:	<input type="text"/>
Award:	<input type="text"/>
	<input checked="" type="checkbox"/> Active
Notes:	<input type="text"/>
Admin Notes:	<input type="text"/>

Set Organisation Access User ID: 33

Time View All	<input type="checkbox"/>
Time Approver	<input type="checkbox"/>
Time Admin	<input type="checkbox"/>
Roster View	<input checked="" type="checkbox"/>
Roster Supervisor	<input checked="" type="checkbox"/>
Time Self	<input checked="" type="checkbox"/>
Staff Admin	<input type="checkbox"/>
Roster Admin	<input type="checkbox"/>
Not Rostered	<input type="checkbox"/>
Resource Booking	<input type="checkbox"/>
Resource Booking Admin	<input type="checkbox"/>

Untick 'Roster View' and 'Roster Supervisor' like this below, then press 'Save'

## Staff Profile: Sample Only

Code:	<input type="text" value="Only, Sample"/>
First Name:	<input type="text" value="Sample"/>
Surname:	<input type="text" value="Only"/>
Job Title:	<input type="text"/>
Email:	<input type="text"/>
Award:	<input type="text"/>
	<input checked="" type="checkbox"/> Active
Notes:	<input type="text" value="Lives in Werribee, no car."/>
Admin Notes:	<input type="text"/>

Set Organisation Access User ID: 3859

Time View All	<input type="checkbox"/>
Time Approver	<input type="checkbox"/>
Time Admin	<input type="checkbox"/>
Roster View	<input type="checkbox"/>
Roster Supervisor	<input type="checkbox"/>
Time Self	<input checked="" type="checkbox"/>
Staff Admin	<input type="checkbox"/>
Roster Admin	<input type="checkbox"/>
Organisation Admin	<input type="checkbox"/>
Not Rostered	<input type="checkbox"/>
Resource Booking	<input type="checkbox"/>
Resource Booking Admin	<input type="checkbox"/>

/Timely/admin/organisationset.aspx?Propagate=0&Type=1&...

And that's it: all done.