Master Rosters

Master Rosters provide a mechanism for the automatic generation (and, optionally, filling) of shifts, based on defined patterns.

Master Rosters are attached to vacancies, and a vacancy may have multiple Master Rosters.

The **Days In Cycle** value determines the length of the repeating cycle. The default is 7 for one week.

A Master Roster starts with a status of **Planning**, which means that added master shifts can be freely moved and deleted, and no live shifts are generated. After it is made **Live**, any changes are carefully marshalled and logged.

If the shifts generated by the Master Roster are to be filled automatically, a list of **Preferred Candidates** must be supplied and ranked in order of preference. The **Use Only Preferred Candidates** setting prevents the shift matchers from using candidates outside the preferred list for shifts generated by this Master Roster.

Master shifts are added, like normal shifts, from the list of Shift Templates. Master shifts are assigned to a **Next Date** which is the nominal next date on which a shift will be generated. E.g. if creating a 7 day Master Roster on a Wednesday, you can place all the Master Shifts in the current week even though the Monday and Tuesday ones are already in the past. The automatic shift generation process will sort it out and roll forward appropriately.

A live Master Roster may be **Paused**. No live shifts will be generated while it is in this state. This is useful if the Master Roster pattern needs to be substantially changed. Pausing and Unpausing events are both logged.

Master shifts in a live roster may be **Suspended** by a right click menu option. You will be prompted for a date after which to start the suspension (leave blank for immediately), and a date on which to resume the shift (leave blank for indefinite suspension). Note that the normal pattern is restored on resumption - a Thursday shift in a weekly pattern will resume on the first Thursday on or after the resume date.

If you need to change a date or time, use the **Re-schedule** right click option. Here, as well as the After and Revert dates, you provide the re-scheduled date and/or times. E.g. you can change a 9am Wednesday shift to 8am on Tuesday, either temporarily or permanently. Note that in this case, be careful with the revert date, depending on whether you want both the Tuesday and the Wednesday shift in the same week or not.

These changes can all be undone, by going to the **Change Log** view and right-clicking on the event you want to undo. However they cannot be undone once live shifts have been generated against the changed masters, which is a good reason for **Pausing** until you are happy with your changes, if live generation is happening continuously.

The Live Shift generation and filling process is normally automatic, based on a defined schedule, but it can be forced using the **Generate Live Shifts** button, so that you can get immediate results.

The **Failure Log** view details all failures encountered while generating and filling live shifts. For example you can use it to discover exactly why the expected candidate was not booked for a particular shift (on holiday, booked elsewhere, expiry of qualifications etc).

The whole Master Roster may be **Suspended** using the button on the top panel. This works by applying a suspension to each affected Master Shift. They will all be logged and, if you need to undo, you must undo the individual log entries.

The whole Master Roster may be **Terminated** when no longer needed. This is irreversible, but you can create a new Master Roster in Planning Mode by using the **Duplicate** button. This copies the live master shifts and preferred people.

From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=ugx-01&rev=1421329792

Last update: **2017/11/16 21:59**