



# Automatic Rota

## Workforce & HR Planning

### Key features:

- ◆ Advanced rota management functions including many post-rota analysis tools:
  - ◆ Automatic rota generation
  - ◆ Calendar/grid view of rota by a specified time period
  - ◆ Automatically generated shift distribution lists (with email functionality)
  - ◆ Baseline vs. Rota matrix (this includes shift fill stats & shows available resources to plug any gaps after the rota has been run)
  - ◆ Rota exceptions report (for post-rota analysis)
  - ◆ Update shift start/end times (for payroll purposes)
- ◆ Simple contact set-up
- ◆ Contact list grouping functions
- ◆ Mass email functions to definable lists
- ◆ Email notifications on specified events such as shift swap requests, shift availability etc.





- ◆ Interactive drill-down dashboards including:
  - ◆ Daily rota details
  - ◆ Daily baseline vs. rota matrix (i.e. shift fill stats)
  - ◆ 'My Calendar' – personalised shift forecast for coming month(s) – includes any events or leave days.
- ◆ Shift 'Avoid' requests – sends an email asking staff to indicate any times they would prefer not to have a shift & system takes these into account. If there are no spare resources, however, they may be assigned a shift regardless.



- ◆ Shift Exchange features for staff including:
  - ◆ Shift swap board (users only see shifts which exemptions/parameters allow)
  - ◆ Swap request maintenance (manage incoming/outgoing swap requests)
  - ◆ Swap history
  - ◆ Pick up extra shifts (giveaways or unfilled)
  - ◆ Give away unwanted shifts (can affect leave)



- ◆ Intelligent quick-search function
- ◆ Organisation chart (auto generated)
- ◆ Maintain secured login access to employees based on role
- ◆ Lite event management features (team meetings, training etc.)



- ◆ Managers' shift notes
- ◆ Detailed staff/HR functions including:
  - ◆ Contact & address details
  - ◆ Contract information inc. hours, pay, work documents & bank details
  - ◆ Personal exemption settings (start & end times of shift exemptions on particular days applicable to specific user)
  - ◆ 2yr Absence requestor



- ◆ Historical metrics including last shift worked, actual/average time(s) worked in specific periods, consecutive days worked etc.)
- ◆ System access settings
- ◆ Specific Shifts including recurring shifts
- ◆ Personal Rota Parameters eg. Max. no. of consecutive night shifts, max. shift duration, admin hours per rota period etc. (applicable to each individual, overwrites Global Rota Parameters)



- ◆ Detailed grids with user definable settings
- ◆ Integration with other systems eg Microsoft Active Directory, Exchange, SharePoint™, accounting systems, payroll systems & more.
- ◆ Advanced filter functions & saveable grid preferences



- ◆ Reporting – navigable overview of all data by section. Also includes:
  - ◆ All absence (paid, unpaid, sick etc.)
  - ◆ Payments & financial info
- ◆ Data archiving (accessible through reports)
- ◆ Audit log – track all changes made in the system including sent emails
- ◆ Screen notification set-up
- ◆ Self-service admin features including:



- ◆ Global rota parameters (overwritten by personal parameter settings)
- ◆ Maintain countries & drop-down lists
- ◆ Event calendar
- ◆ Maintain specified leave days & bank holidays
- ◆ Maintain shift baselines for specific user roles

If you want to get in touch with us for a free quotation, drop an email to [enquiries@intouch-business.com](mailto:enquiries@intouch-business.com).

You can also get in touch with us by phone on **+44 (0)190 388 5900**