



Back to Basics - AutoRoster

Webinar Series FAQs



Session 1 - Identify

Q: Will the entitlement report include staff who are longer in post?

A: From 11.3.2 we have added in new filters to the entitlement report that means you can now filter by the Hiring Date and Leaving Date to make it easier to search and find the data you are looking for.

There is also the option to exclude closed people as well.

Q: When will the quarterly % on the entitlement report be available?

A: This is available from 11.3.1 which is available now for upgrade.

Session 2 – Review

Q: When you import the global pattern template, are you also able to import the rules of who the patterns apply to? Or does that need to be done manually afterwards?

A: This would need to be added manually afterwards.

Q: If no global patterns set up at all how does this affect the auto roster?

A: If there are no global patterns set up there will be nothing for the auto roster to lay down, so dependent on your auto roster settings it will either look for personal/shared patterns to lay down as appropriate, will lay down individual duties in line with your unit/area rules or will not lay down anything.

AutoRoster needs global patterns to power how it works – these patterns determine the ‘nice’ sequence of shifts to assign to staff and should be patterns of work that support the needs of the service being provided and do not contradict any of the unit rules.

Q: What is the difference between global, shared, personal and demand patterns please?

A: Please see definitions below:

- **Global Patterns:** these are used to power the AutoRoster engine and are considered to be ‘nice’ patterns of shifts to work. They are applicable to the entire unit/area but can be made applicable to, or exclude, certain grades/grade types/ person groups/people with a specific skill.
- **Shared Patterns:** these are specific patterns of work that have been agreed for a group of people, specific team, or grade type. These are different to global patterns as they are an agreed pattern of work. An example of shared pattern usage would be a Jnr Drs rotation.
- **Personal Patterns:** these are specific patterns of work that have been agreed for an individual, this might be because the role they are in has set days of work (like the ward manager or admin support for the area) or because they have a flexible working arrangement so need a personal pattern to ensure the agreed shifts are assigned to that staff member ahead of general rostering.
- **Demand Patterns:** this is person generated demand. Instead of having demand attached to the demand template with shifts that need to be filled, staff have specific demand attached to them that is rostered when the patterns are laid down.

Q: Is there any guidance on rules available?

A: Yes, here are links to three guides that will support your roster review

1. [Allocate Optima Unavailability Rules](#)
2. [Allocate Optima Rules](#)
3. [Allocate Optima Duty Rules Global and Ward](#)

Q: Is it correct that 2-week patterns must be manually entered and cannot be uploaded?

A: That is incorrect - two-week patterns can be uploaded via the global pattern import. To do this extend the days at the top, as below, and then import as normal.

Shift Group Name	Pattern Name	DAY1	DAY2	DAY3	DAY4	DAY5	DAY6	DAY7	DAY8	DAY9	DAY10	DAY11	DAY12	DAY13	DAY14
Cole Ward	TWPT1	N	N	N				N	N	N				L	L
Cole Ward	TWPT2			L	N	N	N				N	N	N		

Q: Do we have any templates for global shared and demand patterns?

A: Yes here is the link to the templates on the portal - [Global Pattern Templates](#)

Q: Can we automate the process for laying down the roster from template?

A: Yes, this is coming in 11.3.2

Q: Do you have any guidance on how we can use the shift priority numbers?

A: This will depend on your organisational requirements and the requirements of the units/areas that you are working with. The shift priority is to rank the shifts against the unit from highest to lowest priority in relation to the needs of the service.

Q: Can you advise what 'exclude from summary' means against the shifts?

A: If a duty is ticked to 'Exclude from Summary' it will not appear in the UNIFY report or the Assignment Summary.

Session 3 - Test & BAU

Q: Is Log trace for Allocate/RLDatix to analyse as I have looked at them before and they aren't easy to read?

A: This is used for both your own internal troubleshooting and also for our support team to use if logging an issue.

Organisations can use the log trace summary to review a high-level summary of what has happened in that AutoRoster pass – how long it took, how many duties were processed & assigned, and which patterns could not be assigned due to rule breakages.

If you experience an issue with the AutoRoster the full log trace is something that RLDatix Support will ask for to see how its running.

Q: Do you have to set up a long day shift? We currently merge an early and late.

A: No, you do not need to have a LD if you are utilising combined shifts.

Q: If the global patterns are incorrect or the LD's are not what is on the template will AutoRoster be able to run effectively?

A: No, the AutoRoser will not be able to lay down duties if the patterns are incorrect or contain shifts that do not exist on the demand template.

Q: Does the AutoRoster % degrade as changes are made on the roster once signed off and worked?

A: Yes, it will do as more duties are manually changed once the roster is being worked it will have an impact on how was then auto rostered. We would recommend taking a snapshot of the Roster Stats report at the point of approval to get the true figure when reporting.



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