# Air Maestro

# Training Guide

ROSTERING

## Avinet

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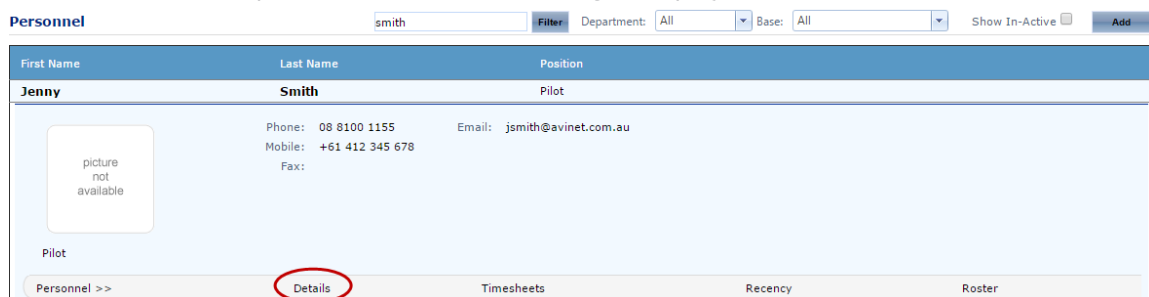**W:** avinet.com.au

# Contents

# Assigning Access Levels

Before users can attempt to manage the rosters for your organisation they must be assigned the correct access levels. Follow the steps below to assign the access levels:

Step 1.   Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

Step 2.   Filter the **Personnel** screen according to your requirements.
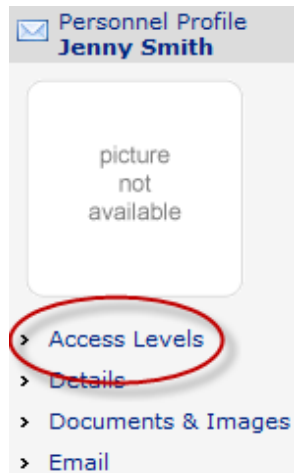
- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3.   Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.



Step 4.   Select 'Access Levels' from the **Personnel Profile** pane.



Step 5.   Click [Edit].

Step 6.  Select all the applicable access levels in the **'Online Rostering'** group.

| Access Level | Description |
| --- | --- |
| **Rosters > Modify Selection** | Allows users to modify rosters for selected base/s and department/s. |
| **Rosters > Modify All** | Allows users to modify all rosters. |
| **Templates > Modify All** | Allows users to create and modify roster templates. |
| **Shift Codes > Modify All** | Allows users to create, modify and disable roster shift codes. The shift codes are also utilised in the Timesheet module. |
| **Work Practices > View All** | Allows users to view all work practices and associated controls via **Operations > Work Practices**. |
| **Work Practices > Modify All** | Allows users to create, modify and disable work practices and associated controls. The work practices are also utilised in the Timesheet module. |

Step 7.  Click [OK].

# Managing Shift Codes

Shift codes are used in the timesheet, leave and rostering modules. It is important that you configure the shift codes according to your organisational requirements, before you use any of the abovementioned modules.

There are five categories of shift codes:

| Shift Code Category | Description |
|---|---|
| Non-Duty | Enter items such as: off and off away. |
| Duty | Enter items such as: charter, duty travel, deployment, fire bombing, night rescue and offshore duties. |
| Leave | Enter items such as: annual, personal, sick, bereavement, jury duty and field leave. |
| Standby | Enter any standby shift items used in your organisation. |
| Aircraft | Enter items relating to aircraft activities such as: maintenance and inspection. |

*There are certain tasks that you can only perform on specific shift codes. For example, bulk updates in the **Timesheet** screen can only be applied to shifts in the Non-Duty and Leave category by default (unless overwritten in the shift code setup).*

## Create Shift Codes

When a new shift code is created, it must contain a unique, identifiable code. The code assigned to the shift is displayed in the roster. For example, the shift code 'Annual Leave' has a code of 'AL'. When the annual leave shift type is assigned to personnel in the roster, AL is displayed to represent the shift type.

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Expand the **My Favourites**, **Duty**, **Non-Duty**, **Standby**, **Leave**, or **Aircraft** pane depending on the required shift.

Step 3.   Right-click in the required pane and click [Insert New Shift Code]. The **Insert New Shift Code** dialog box is displayed.
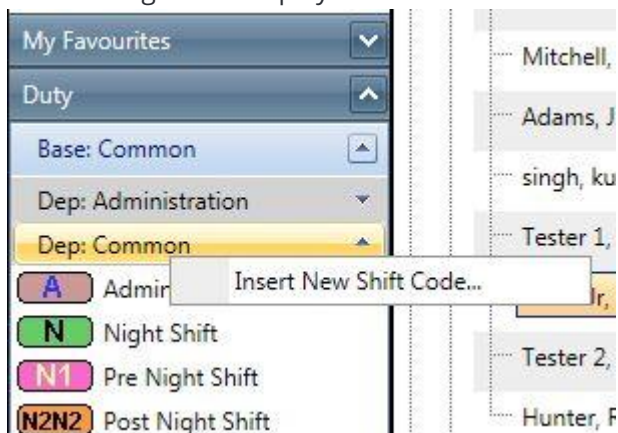
*The **Insert New Shift Code** dialog box can also be accessed via the Rostering Tools menu (**Tools > Insert New Shift Code**).*

Step 4.   Complete the shift code details as per below.

| Field | Description |
|---|---|
| Code | Enter a unique identifier for the shift in the **Code** text box. The code must not exceed four characters. |
| Description | Enter the name of the shift type in the **Description** text box. For example, Training, Day or Annual Leave. |
| Category | Select the shift type from the **Category** radio button list. |
| Duties | Enter the series of duties which comprise this shift. For example, 0700-1300 and 1500-1730. These duties are used to predict compliance with work practice controls and are populated into the user's timesheet for the rostered day. |
| Approx. Hours | Enter the approximate flight hours and sectors for the shift type, if applicable. The value you enter is used to estimate compliance with work practice controls. |
| Sectors | Enter the approximate sectors flown for the shift type, if applicable. The value you enter is used to estimate compliance with work practice controls which take into account sectors flown when determining maximum duty and flight duty periods. |
| Late Night Operation | Select the relevant **Late Night Operation** tick box, if this shift is defined as a late night operation. Select the first tick box, if the previous night was a late night or select the second tick box, if the next night is a late night. For instance, if the duty is 0200-1000, the first tick box must be selected. Alternatively if the duty is 1600-0400, the second tick box must be selected. This option is used to evaluate compliance with the 'late night operations' work practice control. |
| Sleeping Accommodation Available | Select the **Sleeping Accommodation Available** tick box, if sleeping accommodation is available during this shift. This option is used to evaluate compliance with work practice controls which differentiate between resting and sleeping accommodation during split shift breaks. |
| Alternate Duties | Enter the series of flight duties which comprise this shift. For example, 0700-1300 and 1500-1730. |

| | These duties are used to predict compliance with work practice controls and are populated into the user's timesheet for the rostered day. |
|---|---|
| **Work Practice** | Select a default work practice for the shift from the **Work Practice** drop-down list. |
| **Base** | Select the base location for which this shift applies from the **Base** drop-down list. If the shift applies to all base locations, select **'Common'**. |
| **Department** | Select the department for which this shift applies from the **Department** drop-down list. If the shift applies to all departments, select **'Common'**. |
| **Shift** | Enter the shift start and end times. Administrators can override the shift start and end times for individuals.<br><br>Refer to **Create Custom Work Practice and Shift Details** for more information. |
| **AL** | Enter the annual leave entitlements accrued per day in the **AL** field if applicable. This field is only displayed if it has been enabled in the **Leave** module setup.<br><br>If creating a leave roster item, deduct the required period.<br><br>Example for duty roster items:<br>User accrues 20 annual leave days per year. Therefore the annual leave entitlement accrued per duty day is:<br>20 days / 365 days =  0.054<br><br>Example for leave roster items:<br>User accrues 20 annual leave days per year. For each day the user is on leave, their annual leave entitlement is reduced by 1 day. Therefore the annual leave entitlement accrued per leave day is:<br>20 days / 365 days =  0.054<br>0.054 – 1 = -0.94 |
| **FL** | Enter the field leave entitlements accrued per day in the **FL** field. This field is only displayed if it has been enabled in the **Leave** module setup. |
| **Duty Allowance** | Enter the duty allowance accrued per day in the **Duty Allowance** field. This field is only displayed if it has been enabled in the **Leave** module setup. |
| **Start of New Tour** | Select the **Start of New Tour** tick box if the shift represents the first day of a tour. This option is only applicable for organisations who track work practices based on tour length.<br><br>For example, 7 days off is required after a 15 day tour. |

| | In order for the system to calculate the length of the tour, you must setup a **'start of tour'** shift type. |
|---|---|
| **Enable Bulk Duty Update** | Select the **Enable Bulk Duty Update** tick box if the shift can be updated using the bulk update feature in the **Timesheet** screen. This feature allows users to select multiple days and quickly confirm rostered data, without needing to confirm each individual day. This feature is particularly useful for non-duty and leave shift categories. |
| **Enabled** | Select the **Enabled** tick box if this shift is to be active. |

Step 5.   Use the colour swatches to set a colour for the shift code's background and text colour.

Step 6.   Click apply [ ✔ ]. The shift code is displayed in the relevant pane.

> *To add a shift code to your **My Favourites** pane, right-click on the shift code and click [Toggle Favourite]. A copy of the shift code is saved to your **My Favourites** pane.*

## Assign Recency Requirements to Shift Codes

Air Maestro allows you to associate the required recency items for each shift type. For example, a 'Night' shift type, may require currency on the medical and night check recency items. When you verify the roster, it will flag whether any users rostered on this particular shift are not current for the recency items.

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Rostering** screen is displayed in a new window.

Step 2.   Expand the **My Favourites**, **Duty**, **Non-Duty**, **Standby**, **Leave**, or **Aircraft** pane depending on the required shift code.

Step 3.   Right-click on the required shift code and click [Edit Shift Code]. The **Edit Shift Code** dialog box is displayed.
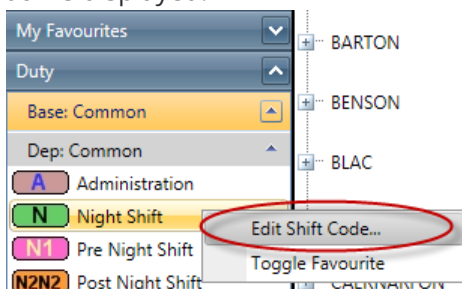


Step 4.   Select the **Recency Validation** tab.

Step 5.    Start typing the name of the recency requirement in the drop-down list.



Step 6.    Select the recency requirement from the drop-down list.

Step 7.    Enter the period the recency item applies to the shift code using the date pickers. If the recency item must apply for the shift code for all time, the date fields can remain blank.

Step 8.    Click [Add].

Step 9.    Repeat **Steps 5-8** to add additional recency requirements.

Step 10.   Select the **Shift Properties** tab.

Step 11.   Click **Apply** [ ✔ ].

*If the shift code is already rostered, the system prompts you to propagate the changes from a selected date. Enter the required date and click [OK].*

## Modify Shift Codes

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Rostering** screen is displayed in a new window.

Step 2.  Expand the **My Favourites, Duty, Non-Duty, Standby**, **Leave** or **Aircraft** pane depending on the required shift type.

Step 3.  Expand the required base and department.

Step 4.  Right-click on the required shift type and click [Edit Shift Code...]. The **Edit Shift Code** dialog box is displayed.
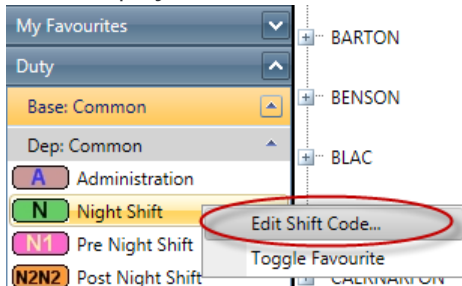


Step 5.  Edit the fields as required.

Step 6.  Click **Apply** [✔].The **Online Rostering** screen is updated.

## Disable Shift Codes

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Rostering** screen is displayed in a new window.

Step 2.  Expand the **My Favourites, Duty, Non-Duty, Standby**, **Leave** or **Aircraft** pane depending on the required shift type.

Step 3.  Expand the required base and department.

Step 4.  Right-click on the required shift type and click [Edit Shift Code...]. The **Edit Shift Code** dialog box is displayed.
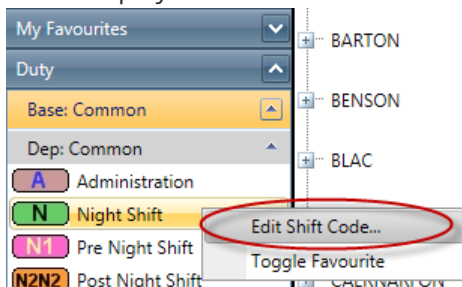


Step 5.  Unselect the **Enabled** tick box.

Step 6.  Click **Apply** [✔].The **Online Rostering** screen is updated and the shift code is disabled. Disabled shift codes are displayed in grey, italic text.

# Rostering Fundamentals

Air Maestro's rostering module makes it easy to build compliant rosters in an online environment. Rosters created in Air Maestro can be verified to ensure they meet the work practice and recency requirements as setup by your organisation. Furthermore, the versioning tool allows you to automatically notify personnel who have been affected by roster changes, using SMS or email.

## The Tools

There are three tools users can select to create and modify rosters. These tools are also referred to as cursor modes:

| Tool | Description |
|---|---|
| Query [ 🔍 ] | Use the **Query** tool to view more information about a roster item, including duty times, compliance with the associated work practice and recency controls and notes. |
| Fill [ 🖌 ] | Use the **Fill** tool to roster items in a non-chronological order for various personnel in the roster. |
| Eraser [ 🖊 ] | Use the **Eraser** tool to delete standard roster items. This tool does not work for customised roster items (those marked with a triangle in the top right corner AL ). To delete customised roster items, refer to **Deleting rosters with custom data**. |
| Copy [ 📋 ] | Use the **Copy** tool to copy selected shift codes to the current user or other users. |
| Move [ ➡ ] | Use the **Move** tool to cut selected shift codes and move them to a different period for the current user or other users. |
| Swap [ 🔄 ] | Use the **Swap** tool to swap selected shift codes. |

## The Views

There are three views users can select from when viewing the roster.

| Tool | Description |
|---|---|
| Roster | Use the **Roster** view to only view rostered shift codes. |
| Actual | Use the **Actual** view to only view actual shift codes. This view only shows you shift codes which have been entered by the user in their timesheet. |
| Hybrid | Use the **Hybrid** view to view a combination of rostered and actual shift codes. This view displays actual shift codes, unless there are no actuals entered in the timesheet, in which case it displays the rostered shift code. |

## Rostered Shift Code Attributes

Rostered shift codes with specific attributes are highlighted in the roster by cornered tips within the rostered item. There are eight different attributes which may be highlighted within rostered shift codes.

| Icon | Description |
|---|---|
| FB | Normal view of a shift code. |
| FB | The red triangle in the upper right hand corner indicates a note or file has been attached to the rostered day. |
| FB | The blue triangle in the upper right hand corner indicates a shift deviation for the rostered day. This can be due to a work practice change or a change in shift time and details. |
| FB | The split blue and red triangle in the upper right hand corner indicates that both a note/file has been attached and shift deviation. |
| T | The yellow triangle in upper left hand corner indicates that the user has leave pending on that day. |
| AL | The green triangle in the upper left hand corner indicates that the user has approved leave on that current day. |
| T A | Extra shift codes on top of the primary shift code indicate that the user has more than one rostered shift code for that day. |
| N1 N A | A shift code placed in between two current rostered days indicates that the user has a night shift code allocated (i.e. a shift code that crosses over midnight). |

## Viewing Rosters

Step 1. Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2. Click **Expand** [ ⊞ ] for the required base location and department.

Step 3. Select the required date period using the **Date Picker** [ 📅 ].

Step 4. Select the **Query** tool [ 🔍 ] in the **Tools** pane.
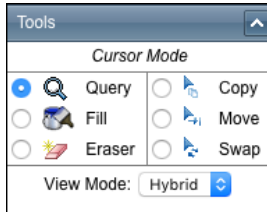
Step 5. Click a shift in the **Calendar** pane to view detailed information. The information window is displayed.
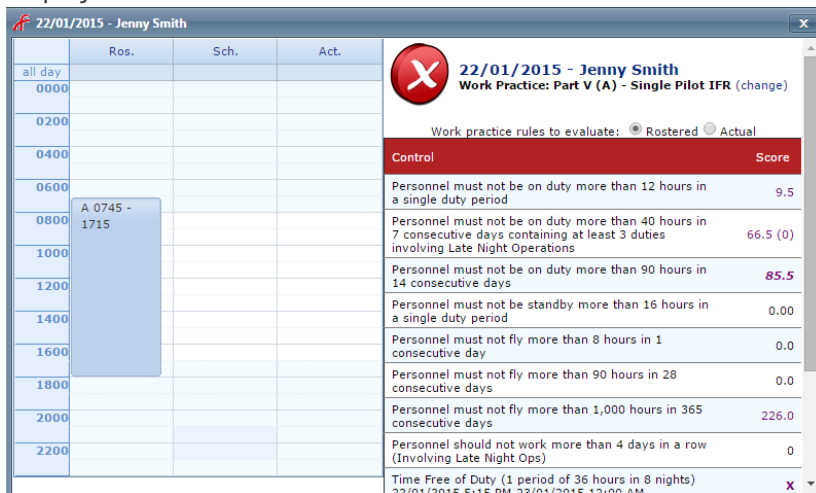
The **Ros.** column indicates the start and end times for the shift. The **Act.** column indicates the actual time for the shift as entered in the timesheet for this user. An icon indicates the compliance status with work practices and recency requirements for that shift. The icons are:

| Icon | Description |
|---|---|
| ✅ | The shift is within the controls of the assigned work practice and complies with all recency requirements. |
| ❓ | The shift is approaching the controls of the assigned work practice or a recency requirement. This status is only displayed if the Notice threshold is enabled for your organisation in the work practice setup. |
| ⚠️ | The shift is approaching the controls of the assigned work practice or a recency requirement. |
| ❌ | The shift exceeds the controls of the assigned work practice or the recency requirement is expired. |

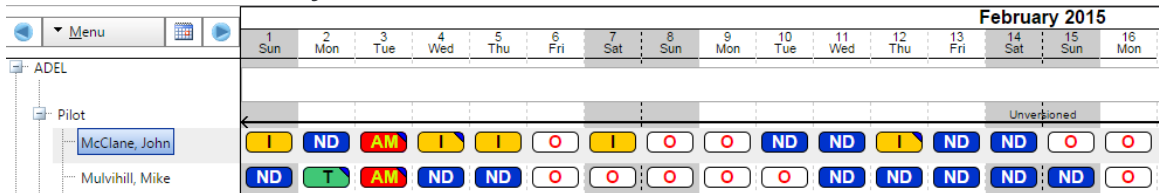# Assigning Shifts

## Assign Shifts Using the Fill Tool

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.   Select the **Fill** tool [ 🖌 ] in the **Tools** pane.
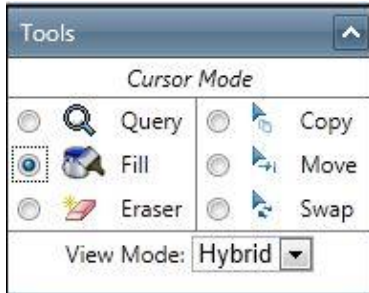


Step 4.   Expand the **My Favourites**, **Duty**, **Non-Duty**, **Standby**, **Leave** or **Aircraft** pane depending on the required shift type.

Step 5.   Click on the required shift code to select it. In the example below, the 'Instructing' shift is selected.
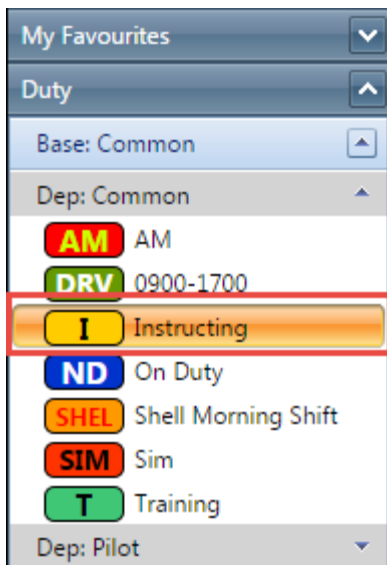


Step 6.   Click on the **Calendar** pane on the days you wish to roster the selected shift type. In the example below, the **'Instructing'** shift code is rostered for **McClane, John** on the **1st**, **4th**, **5th**, **7th** and **12th February 2015**.



Step 7.   Repeat **Step 6** until you have completed assigning the selected shift code to personnel. To change the selected shift code and continue rostering, repeat **Steps 4-6**.
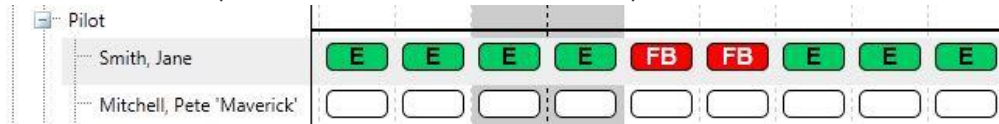
## Copy Shifts to Other Personnel

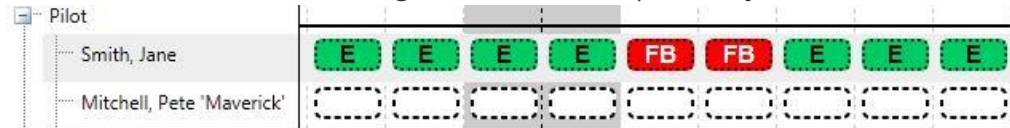The **Copy** tool [ ] allows you to copy selections of the roster to the current user or to other users.

Step 1.    Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.    Click **Expand** [⊞] for the required base location and department.

Step 3.    Select the **Copy** tool [ ] in the **Tools** pane.
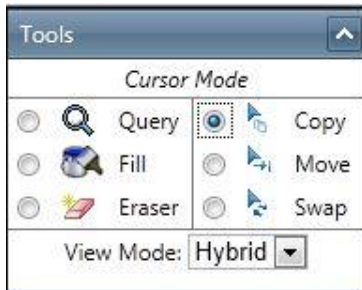


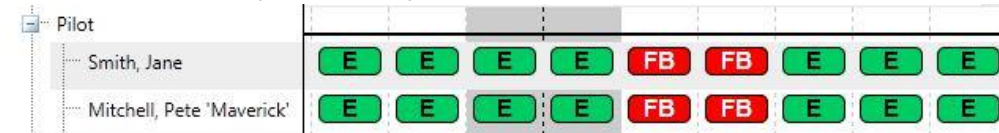Step 4.    **Left-click** the required shift code in the **Calendar** pane. The directional cursor is displayed.



Step 5.    Move the cursor to the left or right to select the required days.



Step 6.    Hold **Shift** on your keyboard and **left-click** when the expanded selection meets the requirements.

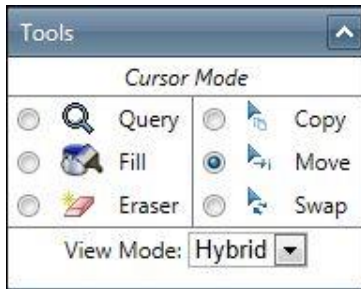Step 7.    Move cursor to the required section of the roster to place copy.

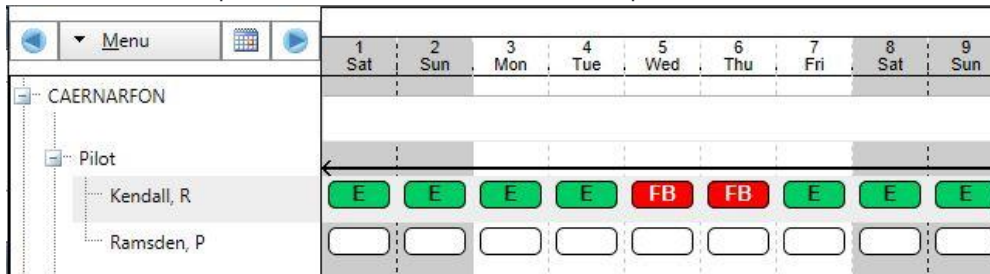Step 8.    Double **left-click** to place the copied section of shifts.

## Move Shifts to Other Personnel

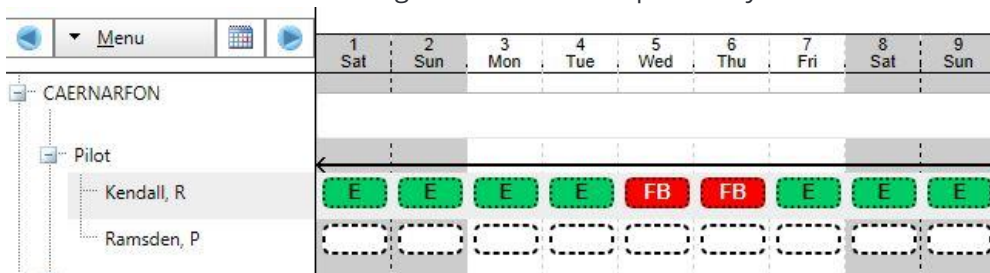The **Move** tool [ 🔗 ] allows you to move selections of the roster to the current user or to other users.

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.  Click **Expand** [ ⊞ ] for the required base location and department.

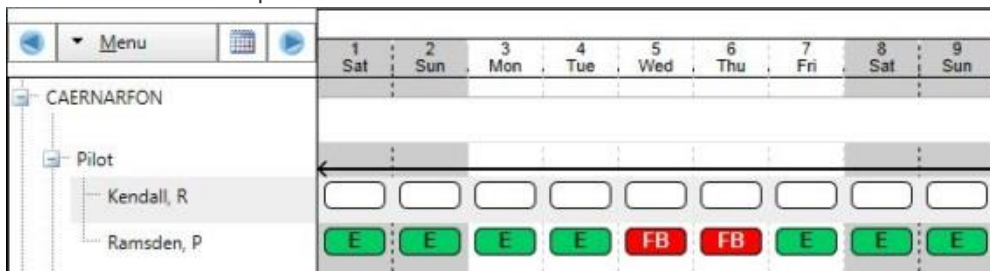Step 3.  Select the **Move** tool [ 🔗 ] in the **Tools** pane.



Step 4.  **Left-click** the required shift code in the **Calendar** pane. The direction cursor is displayed.



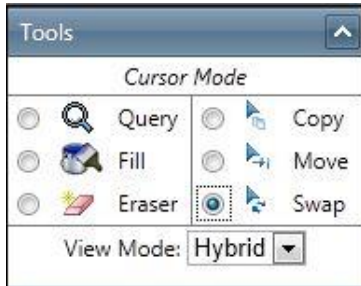Step 5.  Move the cursor to the left or right to select the required days.



Step 6.  Hold **Shift** on your keyboard and **left-click** when the expanded selection meets the requirements.

Step 7.  Move cursor to the required section of the roster to place the shifts.

Step 8.  Double **left-click** to place the section of shifts.

## Swap Shifts with Other Personnel

The **Swap** tool [ ] allows you to swap selections of the roster to the current user or to other users.

**Step 1.**  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

**Step 2.**  Click **Expand** [ ⊞ ] for the required base location and department.

**Step 3.**  Select the **Swap** tool [ ] in the **Tools** pane.



**Step 4.**  **Left-click** the required shift code in the **Calendar** pane. The directional cursor is displayed.
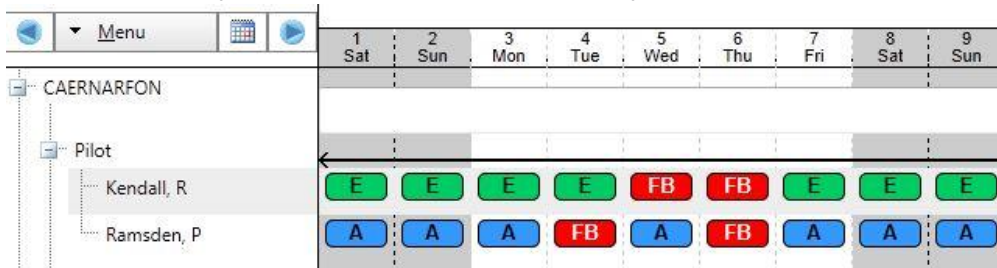


**Step 5.**  Move the cursor to the left or right to select the required days.



**Step 6.**  **Left-click** when the expanded selection meets the requirements.

**Step 7.**  Move cursor the required section of the roster to swap the shifts.

**Step 8.**  **Left-click** to swap the section of shifts.

# Verifying Rosters

Air Maestro allows you to build rosters which are compliant with your work practices and recency requirements. Anytime you create a roster or modify it, it is advisable that you verify the roster.
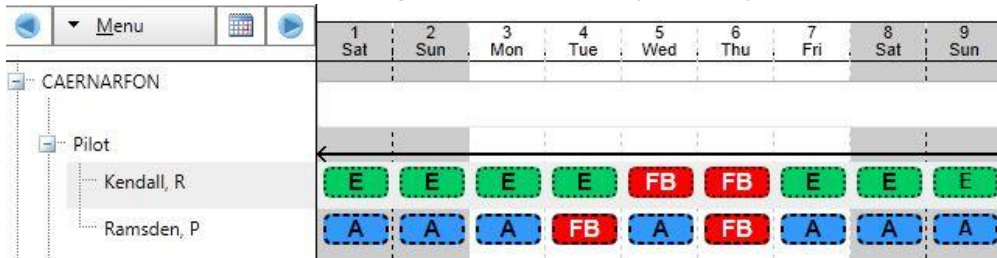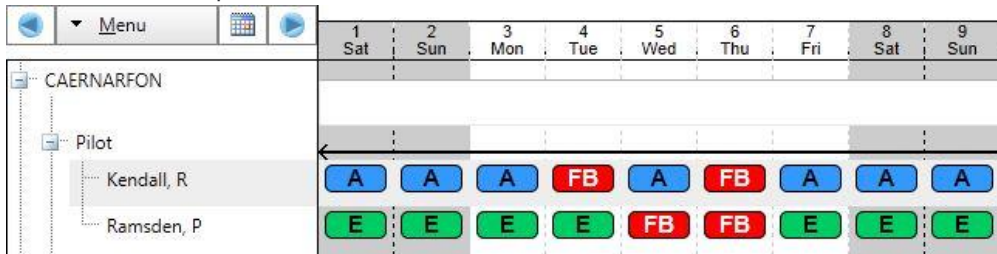
Step 1.    Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.    Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.    Select **Menu > Verify**. The system checks the roster against the work practices and associated recency items to determine whether there are any conflicts with work practice controls or incomplete recency requirements.

When there are no conflicts, a green background is displayed behind the shift code. When the user is close to exceeding the requirements, a yellow background is displayed. Should the user not comply with the requirements, a red background is displayed.



Step 4.    Select the **Query** tool [ 🔍 ] and select the required day in the roster to view the specific requirement that does not comply.



In the above example, **John McClane** is compliant with the requirements of the **CAO 48** work practice, but has not completed the required **'Pilot: 3 Night Landings'** recency item that is associated with the **'Instructing'** shift code.

Step 5.    Modify the roster as required and re-verify it to ensure it is compliant.

# Versioning Rosters

It is good practice to version the roster each time you modify it. Versioning allows you to keep track of changes in the roster and revert to previous versions of the roster if necessary. It also allows you to notify selected personnel of roster changes, via SMS or email.

## Create a New Roster Version

Step 1. Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2. Click **Expand** [⊞] for the required base location and department.

Step 3. Click the **'Unversioned'** text. The **Version Roster** dialog box is displayed.
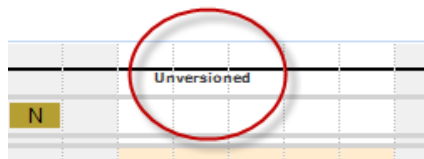


Step 4. Select a start and end date for the version. A preview of the selected version period is displayed in the **Preview** pane.



Step 5. Click [Version] to save a copy of the roster in its current state for the selected version period. The **Version Name** prompt is displayed.

Step 6. Enter a meaningful version name in the text box. You can enter text and/or numerical characters.



Step 7. Click [OK]. You are prompted to notify personnel who are directly and indirectly affected by the new version.

**Step 8.** Select the required communication method for each person or click **'None'** if you do not wish to notify them of the change.



**Step 9.** Select any additional personnel who require email notification of the roster change from the **Select Additional Personnel** drop-down list and click [Add].

**Step 10.** Click [Send Notifications] to notify the personnel about the version change. Alternatively, if you do not wish to notify personnel about the version change, click [Don't Send Notifications]. The version name is displayed for the selected version period.
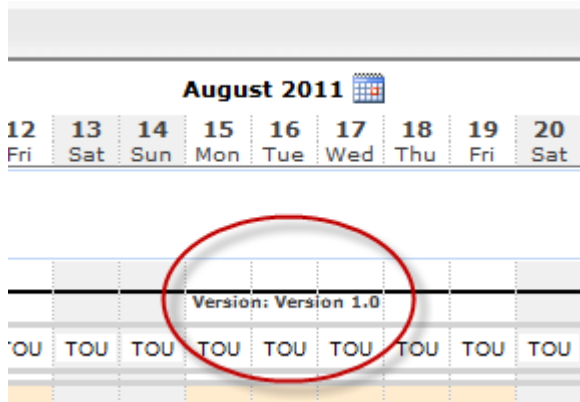
## Update a Roster Version

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.   Click the **'Version'** text. The **Version Roster** dialog box is displayed.



Step 4.   Click [Version] to save a copy of the roster in its current state for the selected version period. The **Version Name** prompt is displayed.

Step 5.   Enter a meaningful version name in the text box. You can enter text and/or numerical characters.

Step 6.   Click [OK]. You are prompted to notify personnel who are directly and indirectly affected by the new version.

Step 7.   Select the required communication method for each person or click **'None'** if you do not wish to notify them of the change.
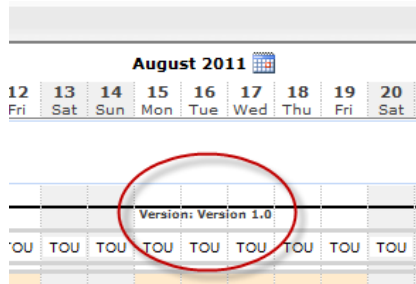
Step 8.   Select any additional personnel who require email notification of the roster change from the **Select Additional Personnel** drop-down list and click [Add].

Step 9.   Click [Send Notifications] to notify the personnel about the version change. Alternatively, if you do not wish to notify personnel about the version change, click [Don't Send Notifications]. The version name is displayed for the selected version period.

# Creating Custom Shift Codes

Air Maestro allows you to customise the shift codes for each rostered day, depending on your requirements. For example, if you have created a 'Day' shift code with a start time of 0730-1700, but you require the rostered user to start the shift later on that day, you can customise the start time and enter a comment.

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Click **Expand** [⊞] for the required base location and department.

Step 3.   Select the **Query** tool [🔍] in the **Tools** pane.
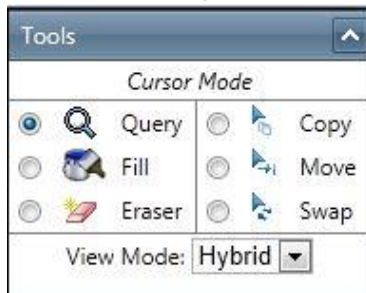


Step 4.   Click the required shift in the **Calendar** pane. The dialog box detailing the work practice and shift time is displayed.

Step 5.   Click [Change], to change the default work practice for the shift.



**10/08/2011 – Aleks Banas**
**Work Practice: CAO 48** (change)
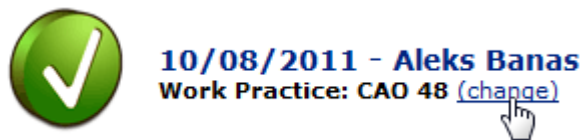
Step 6.   Select the required work practice from the **Work Practice** drop-down list.

Step 7.   Click [Apply]. The work practice is updated for the current shift.



**10/08/2011 – Aleks Banas**
**Work Practice: CAO 48 Part VIII – Emergency A** (change)
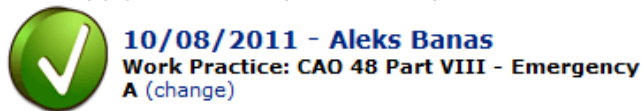
Step 8.   Click the rostered shift below the **Ros.** Text. The **Edit Duty Period** pane is displayed.



Step 9.   Adjust the duty, shift and flight times as required.

**Step 10.** Enter the reason for the shift change or any special conditions in the **Note** field.



**Step 11.** Click [Update]. The rostered shift time is adjusted in the **Ros.** Column.



**Step 12.** Click [X] to close the dialog box. In the **Calendar** pane the shift code is displayed with a coloured triangle in the top right corner. The triangle indicates that the item contains custom data and a note.

*If you update any shift times or include notes for any shift code, these changes are highlighted to the user when they view **My Profile > My Roster** in the **Changed Duty Periods** and **Notes** panes.*

# Rostering Split Shifts

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.  Click **Expand** [⊞] for the required base location and department.

Step 3.  Select the **Fill** tool [ 🖌 ] in the **Tools** pane.
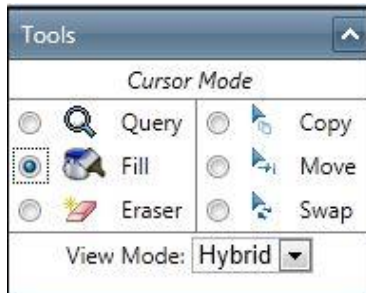


Step 4.  Expand the **My Favourites**, **Duty**, **Non-Duty**, **Standby**, **Leave** or **Aircraft** pane depending on the required shift code.

Step 5.  Select the required shift code.

Step 6.  Hold the **Ctrl** key on your keyboard, **left-click** on the required day to add an extra shift; you can have a maximum of three shifts on a single day. In the example below **'Smith, J'** has split shifts on the **24th** and the **25th** of **August, 2012**.



Step 7.  Modify the shift times for the shift code if required.

Step 8.  Select the **Query** tool [ 🔍 ] in the **Tools** pane.

Step 9.  **Left-click** on the rostered day.

**Step 10.** Enter the reason for the additional shift or any special conditions in the **Note** field.



**Step 11.** Click [X]. The shift is displayed with extra smaller shifts below the primary shift.



**Step 12.** Click [X] to close the dialog box. In the **Calendar** pane the shift code is displayed with a coloured triangle in the top right corner. The triangle indicates that the shift code contains custom data.



*If you update any shift times or include notes for any shift code, these changes are highlighted to the user when they view **My Profile > My Roster** in the **Changed Duty Periods** and **Notes** panes.*

# Deleting Shifts

It is good practice to version the roster each time you modify it. Versioning allows you to keep track of changes in the roster and revert to previous versions of the roster if necessary. It also allows you to notify selected personnel of roster changes, via SMS or email.

## Deleting Single Shifts

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.   Select the **Eraser** tool [ 🖊 ] in the **Tools** pane.

Step 4.   Click the shift code to delete in the **Calendar** pane. In the example below, the third shift code for the pilot **'Banas, A'** is deleted.
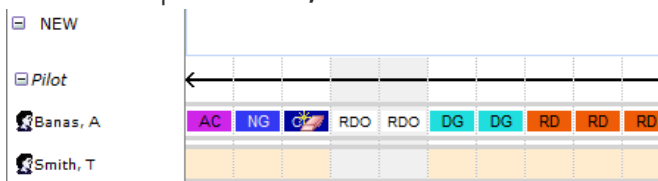


## Deleting Multiple Shifts

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.   Select the **Eraser** tool [ 🖊 ] in the **Tools** pane.

Step 4.   Hold **Shift** on your keyboard and **left-click** the first shift code to delete in the **Calendar** pane. The directional cursor is displayed.

Step 5.   Move the directional cursor to the left or right to select the required shift codes. In the example below, the shift codes on the **6**th, **7**th, and **8**th of **June 2011** for the pilot **'Banas, A'** are selected.



Step 6.   Click on the last shift code of your selection (e.g. 8th of June 2011 in the example above).

## Viewing & Modifying Personnel Entitlements

Step 1.    Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.    Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.    **Right-click** for the required person and select [View Details]. The person's entitlements are displayed.



*To insert accumulated entitlements, click [Insert Brought Forward] and update the required fields. Click [OK] to save the changes.*

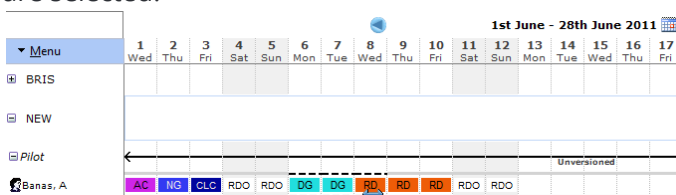Step 4.    Click [X] to close the dialog box.

## Adding Base Notes to Rosters

Step 1.    Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.    Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.    Enter the base note in the **Base Notes** text box located to the right of the base name.



*The base note is automatically displayed to all personnel at the base for the rostered month in the **Company News** pane on the Home screen. It is also displayed in the base roster for the rostered month.*

Step 4.    Click out of the **Base Notes** text box. The prompt to save the note is displayed.

Step 5.    Click [OK].

# Touring Personnel

By default, personnel are displayed in the roster in their primary base and department (as setup in the personnel wizard). When personnel tour to other bases, they can be temporarily transferred to that base in the roster for a specified date range.

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.
Step 2.  Click **Expand** [ ⊞ ] for the required base location and department.
Step 3.  Drag and drop the required person to the required base. The **Tour Resources** dialog box is displayed.



Step 4.  Select the target base in the **To Base** drop-down list.
Step 5.  Specify the period the person must be located at the target base in the **Between** and **And** date pickers.
Step 6.  Click [Transfer]. The **Online Rostering** screen is updated and the person is transferred to the new base.

> *During the tour period the touring user is listed at their touring base with an asterisk next to their name to indicate they are touring.*

# Changing Personnel Order

By default, personnel are listed in alphabetical order in the roster. The default order can be revised to suit your requirements. Once the order revised, it is retained in the system until further changes are applied.

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.
Step 2.  Click **Expand** [ ⊞ ] for the required base location and department.
Step 3.  Drag and drop the required person to the desired location.
Step 4.  Repeat **Step 3** to change the order of addition personnel.

# Validating Shifts

Air Maestro's Shift Validation feature allows you to setup shift requirements for each base and department. For example, you may require at least two personnel to be rostered for a shift type of 'AM' each day. You can set this up as a shift validation rule for the relevant base/department and when you review the roster, the system highlights if the rule is met. Should the rule not be met, the date not meeting the rule is highlighted in red for the relevant rule.

In the example below, a shift validation rule for 'AM' duties is enabled for the Adelaide Pilot base. On the 1st and 3rd the requirements of the rule are met and hence the date is highlighted in white, with the count of shifts displayed in the corresponding column. However, on the 2nd and 4th the rule is not met and hence the date is highlighted in red, with the count of shifts displayed as '0'.

The shift validation rule requires at least two shift codes of 'AM' for every day of the roster. The 1st has two personnel assigned to this shift code, the 2nd has no personnel assigned to this shift code, the 3rd has three personnel assigned and the 4th has no personnel assigned. The row containing the shift validation rule for 'AM Duty' is updated accordingly.

## Create a Shift Validation Control

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.  **Right-click** the required base or department.
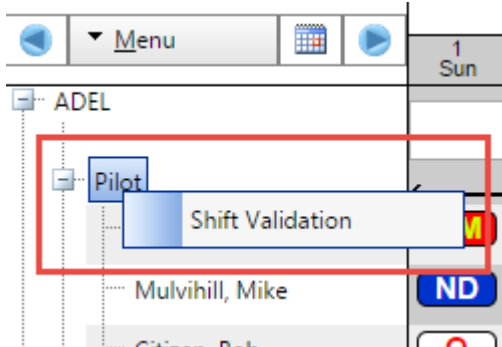


Step 3.  Click [Shift Validation]. The **Shift Validation** dialog box is displayed.

Step 4.  Click [Add Control] in the **Controls** pane.



Step 5.  Enter the name for the shift validation control in the **Short Name** field.

Step 6.  Select the **Display in Roster** tick box to show the rule in the roster, below the name of the last user in the base/department.

Step 7.  Select the **'In total personnel ↓'** option from the **Control Type** drop-down list.

Step 8.  Select the required option from the **must work** drop-down list.

| Option | Description |
|---|---|
| **At least** | Select this option to ensure that there are at least X personnel assigned to the shift code(s) for this rule. If this option is selected and there are more than the required number of personnel assigned to the shift code(s) on a given day, the control is still flagged as green. |
| **No more than** | Select this option to ensure that there are no more than X personnel assigned to the shift code(s) for this control. If this option is selected and there are more than the required number of personnel assigned to the shift code(s) on a given day, the control is flagged as red. This option is useful for controls relating to off duty periods and leave. |
| **Exactly** | Select this option to ensure that there are exactly X personnel assigned to the shift code(s) for this control. If this option is selected and there are less or more than the required number of personnel assigned to the shift code(s) on a given day, the control is flagged as red. |

**Step 9.** Enter the required number of shifts for the control to be satisfied in the **duty period(s)** field.



**Step 10.** Select the shift code(s) that satisfy the control from the **of type** drop-down list.

**Step 11.** Select the base(s) and/or department(s) where this control is applicable from the **For Bases/Departments** drop-down list.

**Step 12.** Select the **Enabled** tick box to immediately active the control.

**Step 13.** Click [Update].



The shift validation control is added to the **Controls** pane.



It is evaluated for compliance with the dates set in the **Over Period** fields. To evaluate a different period, modify the required dates and click [Re-Validate Selection].



**Step 14.** Click [X] to close the **Shift Validation** dialog box.

**Step 15.** Expand the required base and department.

**Step 16.** Review the shift validation control for the required period.
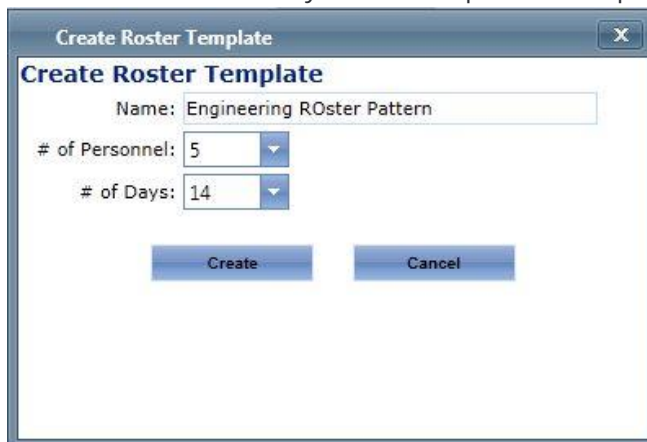


💡 *To hide the shift validation control from the roster, select **Menu > Hide Shift Validation**. To show the shift validation controls, select **Menu > Show Shift Validation**.*

# Validating Shifts

If your rosters contain a set structure, you can save time rostering by creating and applying a roster template.

## Create a Template

Step 1.  Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.  Select **Menu > Create Roster Template**. The **Create Roster Template** dialog box is displayed.

Step 3.  Enter a descriptive name for the template in the **Name** text box.

Step 4.  Select the number of personnel the template must span in the **# of Personnel** drop-down list.

Step 5.  Select the number of days in the template must span in the **# of Days** drop-down list.



Step 6.  Click [Create].

Step 7.  Click **Expand** [ ⊞ ] for the newly created template in the Templates list.

Step 8.  Create the template by assigning the required roster codes to the template users, using the **Fill** [ 🖌 ] tool.

## Apply a Roster Template using Advanced Tools
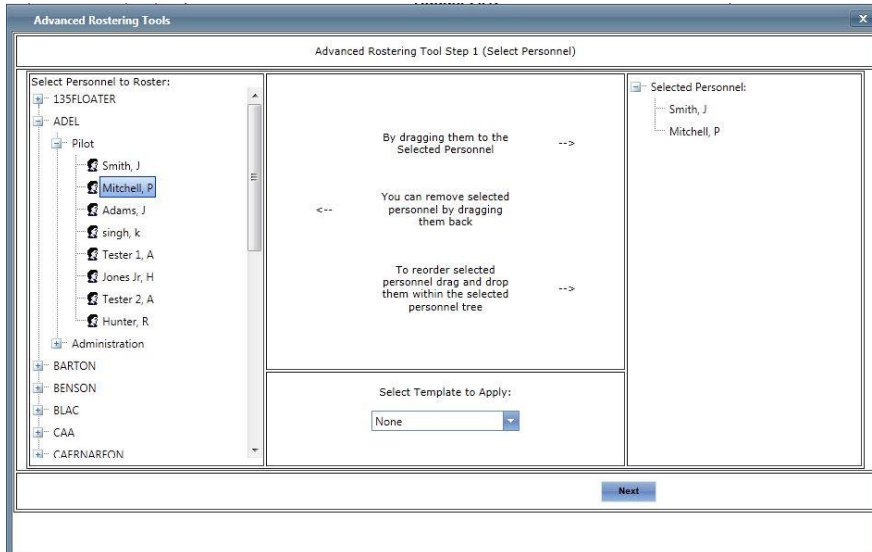
Step 1. Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2. Select **Menu > Advanced Tools**. The **Advanced Rostering Tools** dialog box and the **Advanced Rostering Tool Step 1 (Select Personnel)** is displayed.



Step 3. Select the required personnel whom you wish to apply the template for in the **Select Personnel to Roster** pane.

> *To select an entire department, click on the department name.*

Step 4. Drag the selected personnel to the **Selected Personnel** tree.

Step 5. Sort the order of personnel in the **Selected Personnel** tree if required.

Step 6. Select the required template you wish to apply from the **Select Template to Apply** drop-down list.

Step 7. Click [Next]. The **Advanced Rostering Tool Step 2 (Define Selection)** is displayed.

Step 8. Select the start and end date you wish to apply the template from the **Select Start Date** and **Select End Date** calendars.

Step 9. A preview of the roster is displayed in the **Preview** pane.

Step 10. Click [Next]. The **Advanced Rostering Tool Step 3 (Setup Repeat Rules)** is displayed.

Step 11. Select the applicable copy option from the **Copy current selection to** radio buttons.

| Option | Description |
|---|---|
| **Themselves** | Copy the defined template period from Step 2 to the current user for the next period. |
| **Next User** | Copy the current user's defined template period from Step 2 to the next user in the roster for the next period. This option is used in rolling rosters. |

| Previous User | Copy the current user's defined template period from Step 2 to the previous user in the roster for the next period. This option is used in rolling rosters. |
|---|---|

Step 12.  Select the number of times the template must be applied to the selected personnel in the **Loop** drop-down list.



Step 13.  Click [Apply]. The selected template is applied to the selected personnel.

## Apply a Roster Template using Quick Assign Template

Step 1.   Select **Operations > Scheduling > Roster**. The **Online Roster** screen is displayed in a new window.

Step 2.   Click **Expand** [ ⊞ ] for the required base location and department.

Step 3.   **Right-click** the start date for the selected personnel you wish to apply the template from in the **Calendar** pane.

Step 4.   Select the **Apply Template** option from the right-click roster menu.

Step 5.   Select the required template you wish to apply.

Step 6.   Select the applicable apply template option.

| Option | Description |
|---|---|
| **Entire Template** | Apply the selected template to the selected user and all subsequent users below the current user. |
| **Row 1, Row 2, etc.** | Apply only the first row of the selected template to the selected user. |

Step 7.   The **Advanced Rostering Tool Step 2 (Define Selection)** is displayed.

Step 8.   A preview of the roster is displayed in the **Preview** pane.

Step 9.   Click [Apply] to apply the template. The selected template is applied to the selected personnel.

Step 10.  Alternatively if the template requires looping click [Next]. The **Advanced Rostering Tool Step 3 (Setup Repeat Rules)** is displayed.

Step 11.  Select the applicable copy option from the **Copy current selection to** radio buttons.

| Option | Description |
|---|---|
| **Themselves** | Copy the defined template period from Step 2 to the current user for the next period. |
| **Next User** | Copy the current user's defined template period from Step 2 to the next user in the roster for the next period. This option is used in rolling rosters. |
| **Previous User** | Copy the current user's defined template period from Step 2 to the previous user in the roster for the next period. This option is used in rolling rosters. |

Step 12.  Select the number of times the template must be applied to the selected personnel in the **Loop** drop-down list.



Step 13.  Click [Apply]. The selected template is applied to the selected personnel.