Roster Boss©

# More Features

* Specify different companies and business units within
* Specify users per company and business unit – users are also workers
* Specify different types of workers, e.g. manager, shift-manager, barista, butcher, cashier, etc.
* Specify calendars for company and business unit
* Specify shift plan – standard, standard for weekday, holiday, and day-specific
* Specify shift requirements
  + Type of worker x count
* Specify worker preferences
  + Minimum hours per week and day
  + Maximum hours per week and day
  + Preferred hours per week and day
  + Preferred days of week
  + Preferred times of day
  + Excluded days of week
  + Excluded times of day
  + Specific exclusion periods
* Specify manager’s preference criteria rankings
  + Most months of service
  + Highest job performance rating
  + Round-robin fairness
    - Latest date last scheduled
    - Latest date last scheduled for non-preference
    - Latest date last worked
  + Minimum days late
  + Minimum days missed
  + Minimum days sick
  + Tags present
* Specify shift schedule generation settings
  + No. of weeks to generate
  + Weeks to lock – requires employee trading
* Tags
  + Create new tags
  + Assign tags to workers

# Weekly Roster Scheduling Algorithm

1. For each manager preference criteria (in ranked order):
   1. Go through all employees that meet the criteria
   2. Schedule them to their preferred days and shifts
2. For each day of the week
   1. For each shift on day
      1. Select workers who haven’t met minimum hours for week
      2. Exclude workers who can’t work this day of week or shift
      3. Select workers who prefer this day and shift period

# Features

1. Specifying Worker Settings
   1. Worker Calendar
      1. Inherit from other calendar
      2. Import holidays for locality
   2. Worker Parameters
      1. Name
      2. Certifications
      3. Tags
      4. Last date scheduled
      5. Last date scheduled to non-preference
      6. Last date worked
      7. YTD days late, missed, sick
      8. MTD days late, missed, sick
      9. Performance Rating
      10. Months of service
   3. Worker Preferences
      1. Min. and Max. Hours per day and week
2. Specifying Shift Templates
   1. Name
   2. Worker Tags Required
   3. Worker Tags Optional
3. Scheduling Workers for Shifts
   1. Creating Special Shifts
      1. Shift to Create
   2. Auto-creating Shifts
      1. Auto-creation settings

Company

Id

Name

BusinessUnitList

Business Unit

Id

Name

BusinessUnitList

ShiftList

ShiftRosterList

Shift

Id

ValidFromDate

ValidToDate

StartTime

EndTime

RequirementTagList

ShiftRoster

ShiftId

Start Date-time

End Date-time

WorkerAssignList

Worker

Id

Name

TagList

WorkerAssignList

ShiftTradeRequestList

WorkerAssign

WorkerId

ShiftTradeRequest

# Minimum Viable Product

1. Metaera Functions
   1. Super Administrator
      1. CRUD Companies
      2. Configure Billing Parameters
      3. View Usage Statistics
2. Company/Business Unit Functions
   1. System Administrator
      1. Configure Company Settings
      2. CRUD Business Units
      3. CRUD User Roles
         1. Set/Clear Type: System Admin, General Manager, Shift Manager, Worker, Customer
      4. CRUD Users
         1. Add/Remove User Roles (All)
   2. General Manager
      1. CRUD Users
         1. Add/Remove User Roles (Shift Manager & Worker)
         2. Shift Scheduling Parameters
            1. Weekly Settings

Minimum Hours

Preferred Hours

Maximum Hours

Preferred Days of Week

Excluded Days of Week

Maximum Consecutive Days

Minimum Full Day Breaks

Preferred Full Day Breaks

Allow Double Shifts?

* + - * 1. Shift Settings

Minimum Hours

Preferred Hours

Maximum Hours

Preferred Times of Day

Excluded Times of Day

* + - * 1. Specific exclusion periods
    1. Configure Worker Preference Ranking Criteria (overall)
       1. Most months of service
       2. Highest job performance rating
       3. Round-robin fairness
          1. Latest date last scheduled
          2. Latest date last scheduled for non-preference
          3. Latest date last worked
       4. Minimum days late
       5. Minimum days missed
       6. Minimum days sick
       7. Tags present
    2. CRUD Work Units
    3. CRUD Year Periods
    4. CRUD Shift Types
       1. Name
       2. Based on:
          1. Work Unit Volume
          2. Period of Year
          3. Day of Week
          4. Time of Day
       3. Add/Remove Worker Roles with Min./Max Count
    5. Configure Default Shift Parameters (all shifts)
       1. CRUD Fixed Shift Meal Breaks
          1. Minimum Work Hours Required
          2. Shift Crosses Start – End: Break Duration
       2. CRUD Floating Shift Meal Breaks
          1. Minimum Work Hours Required
          2. For Floating Shifts Between Start Time – End Time
          3. Break Duration
          4. Only Before or After Floating Shift?
       3. CRUD Rest Breaks
          1. For Every X Hours Contiguous Work
          2. Rest Duration Minutes
    6. CRUD Shifts
       1. Fixed or Floating
       2. Specify Shift Type
       3. Configure Shift Parameters
    7. Manually Assign User to Shifts
  1. \*Shift Manager
     1. Configure Worker Preference Ranking Criteria (this shift)
     2. CRUD Sub-shifts (this shift only)
     3. Configure Shift Parameters (this shift only)
     4. Manually Assign Worker to This Shift
  2. Worker
     1. Configure Preferences
  3. \*Customer Booking

# Screens

1. Super Administrator
   1. CRUD Business Units
2. System Administrator (Customer)
   1. Company Settings
3. General Manager
   1. Shift Planning
4. Worker
5. New Customer
   1. Customer Sign-up