



A Quick Guide to Rostering Software



roubler.

A man and a woman are smiling and looking at a tablet together in a cafe. The woman is on the left, wearing a grey blazer over a white top. The man is on the right, wearing a denim shirt and a brown apron. They are both looking at the tablet held by the man. The background shows a cafe interior with several hanging lamps and a counter with pastries.

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Introduction

Thanks to ever-evolving workforce management technology, the days of creating rosters and timesheets in an Excel spreadsheet are numbered. Your business has likely realised the many pitfalls of these longstanding employee management tools: confusion about rostered shifts, lost rosters, staff budget blow-outs, people arriving late for shifts, time wasted on manual data entry, endless data inaccuracies, and incorrect pay runs. These pitfalls can mean that businesses lose thousands of dollars each year.

But imagine having real-time visibility of your largest expense – paid employee hours. What if you could create and send compliant rosters in minutes, issue roster updates directly to your employee’s smartphones and see at-a-glance exactly how much you are spending on labour each day, week or month?

Online, fully-automated rostering software makes this entirely possible. But with a plethora of options and features available, it can be difficult to know where to start when you are looking for this critical component of your automated workforce management system.

To make this job easier we’ve put together a guide to the fundamentals of rostering software, together with a simple checklist of features that we believe every rostering software system should offer. You can use this list as a starting point to help you identify exactly what you need, and then use it to compare different providers.

The Fundamentals of Rostering Software

Before you start researching rostering software providers, you'll need to have a clear understanding of the core purpose, features, pros and cons that rostering software offers.

The purpose of rostering software

An automated rostering tool is a piece of software that uses your employee profile details, compliance rules, and staffing budgets to help you plan shifts, calculate labour costs and create and send rosters to employees. It can be accessed via internet-enabled desktop computers, smartphones or tablets.

It is designed to make your manager's lives easier by speeding up and simplifying the rostering process, keeping communications and information in a secure, central location, and improving rostering accuracy and workforce visibility.

However, this software is more than just a sophisticated spreadsheet. It can:

- Help ensure your rosters comply with employment law regulations about minimum and maximum working hours, meal breaks and time between shifts by alerting you to potential issues.
- Offer managers a single reference point to see which staff are rostered on for each shift.
- Prevent staff from being rostered on for a shift when they are on leave or are marked as unavailable.
- Provide owners and managers with accurate, detailed data on labour costs, and labour efficiency to help reduce over-rostering and excessive use of overtime.
- Communicate directly with employees via a mobile app. Rosters and updates are sent directly to employee's smartphones, removing the need for paper rosters, messaging apps, and emails.
- Integrate with time and attendance tools to show rostered versus actual time worked.
- Integrate with payroll engines to ensure payroll accuracy.
- Empower employees to manage their time by submitting unavailability requests, leave requests and shift swaps which, once approved, appear directly in the roster.

The pros and cons of rostering software – a quick list

Pros:

- Eliminates the need for manually creating and printing rosters.
- Eliminates the need to distribute rosters and updates via email, paper or messaging apps.
- Greatly speeds up rostering as data is automatically pulled from employee profiles so there is no need to refer to multiple information sources around availability, leave, skillsets and pay rates.
- Reduces confusion about shifts if multiple updates are made.
- Availability data makes it easier to fill shifts at short notice.
- Ensures compliance with employment laws around working hours with notifications.
- Eliminates data entry when integrated with employee self service, time and attendance, and payroll.

- Planned versus actual labour costs give managers valuable financial and staffing insights to help improve how rosters are built.
- Employee self service, particularly via mobile apps, improves employee engagement.
- Often integrates with external time and attendance, accounting and payroll software.

Cons:

- Can be more expensive than manual paper or spreadsheet methods.
- Employees may be resistant to using a rostering app if they are uncomfortable with technology.
- Some time is required to implement the system and train staff.
- You will need to have an offline contingency plan should an electricity blackout or internet outage occur.



Rostering Software Features

Feature	Details
Easy-to-use interface	<p>Look for simple, clean interfaces that employees with all levels of technical ability can navigate.</p> <p>Rostering software should offer you a variety of views e.g. day, week, month.</p>
Cloud-based SaaS for flexibility	<p>A cloud-based application will offer managers and their employees greater flexibility for accessing and entering data in non-office environments on multiple devices such as smartphones, tablets, and desktop.</p> <p>A cloud-based system also means that your data will always be secure, and updates to the system will occur without delays or downtime.</p>
Efficiency tools: auto-fill, copy roster, template rosters	<p>These tools allow you to create rosters quickly using templates, 'auto fill' options and 'copy roster' tools so you don't have to start each roster from scratch. This is particularly useful if you know that your staffing for one week will be the same as the previous week.</p> <p>These tools are core to the time savings that rostering software offers so should be made a priority for assessing providers.</p>
Smart rostering	<p>Some software products offer a 'smart' or 'intelligent' rostering feature which uses machine learning or criteria based on data from employee profiles, payroll information plus leave and unavailability to fill shifts or suggest employees for a shift.</p> <p>Suitability for a role may be assessed on the basis of:</p> <ul style="list-style-type: none">• availability e.g. not on leave• the type of role required• the minimum hours off required between shifts• maximum working hours limits• staff performance rating

Shift patterns	If a business has staff who work regular shifts each week or fortnight, this function allows managers to pre-set shift patterns that can be auto-filled into the roster each week. This saves many hours of work entering shifts and remembering each permanent part- and full-time employee's working hours.
In-built communication tools	<p>Most rostering software allows you to distribute rosters, communicate updates and send shift requests directly to an employee self service portal and/or mobile app. That way employees have the most up-to-date roster at hand. All communications regarding rosters can be conducted via the app or portal.</p> <p>These features are core to the time savings and process efficiencies that rostering software offers so should be made a priority for assessing providers.</p>
Ability to set an approval hierarchy for quality control	Approval workflows are used to ensure quality control before rosters are approved and published. This can be useful when multiple levels of management are involved in the process.
Shift change requests	Some software providers allow you to send requests to employees for shift changes or additional shifts for approval or decline. If approved, the shift automatically appears in their roster.
Leave and unavailability views and controls	<p>Rostering software should allow you to see all approved leave and unavailability requests from one screen.</p> <p>It should prevent rostering mistakes by alerting managers if they try to assign a shift to someone who is unavailable or on leave that day.</p>
Shift-swapping function	<p>A shift-swapping function eliminates the confusion caused by employees trying to swap shifts via text message, WhatsApp, social media or email.</p> <p>Employees can offer their shift to others in the same location using a mobile app or employee self service portal.</p> <p>Online rosters are automatically updated when swaps occur.</p>
Labour cost calculator and forecasts	A labour cost calculator that interprets Modern Awards will allow you to see your true labour costs in real time to allow you to monitor budgeted against actual expenditure.



Integration with Time & Attendance system	By having your rostering and time and attendance functions incorporated into the one platform you'll have visibility of rostered versus actual time worked. This data is useful in managing absentees, break times, late starts and early finishes.
Integration with or inbuilt payroll engine	To have a truly automated system, rostering data should flow seamlessly into a time and attendance system and then into an integrated payroll engine so that data entry and transfer is eliminated and pay runs can be executed accurately and on time.
Compliance notifications	If the rostering software is integrated with Modern Awards interpretation software/employment law compliance software, notifications can be set so that managers are alerted if they assign shifts in a way that may breach regulations.
Modern Award interpretation	Your rostering system should be able to automatically calculate any combination of time rates, overtime, complex arrangements such as higher duties or split shifts, leave entitlements, superannuation and other industry-specific provisions based on employee profiles and Modern Award templates. Awards should be automatically updated by the provider so that you are always compliant.
Scalability & multi-site Rostering	Look for a system that can easily accommodate the growth of your business in terms of employee numbers and additional locations as cost-effectively as possible. Having a multi-site rostering view allows you to see staffing and labour costs across your entire business and is useful in managing staff who work across multiple locations without having separate logins or accounts.
Installation and training	Staff training should be included in your rostering software subscription.
Technical support	Your system should be simple enough that little to no support is required. However, you should still have a single point of contact for technical questions and issues.



Rostering Software Provider Comparison Chart

Feature	Roubler ✓ or ✗	Provider 2 ✓ or ✗	Provider 3 ✓ or ✗
Easy-to-use interface	✓		
Cloud-based SaaS	✓		
Efficiency tools: auto-fill, copy roster, template rosters	✓		
Smart rostering	✓		
Shift patterns	✓		
In-built communication tools	✓		
Ability to set an approval hierarchy for quality control	✓		
Shift change requests	✓		
Leave and unavailability views and controls	✓		
Shift-swapping function	✓		
Labour cost calculator and forecasts	✓		
Integration with Time & Attendance system	✓		
Integration with or inbuilt payroll engine	✓		
Compliance notifications	✓		
Modern Award interpretation	✓		
Scalability & multi-site Rostering	✓		
Installation and training included	✓		
Technical support included	✓		

Whether you're considering automated rostering software for the first time, or you're trying to replace a system you've outgrown, you will be faced with a seemingly endless supply of options. It's easy to get caught up in the hype of the latest-and-greatest technology available but instead, focus on systems that perfect the basics. If you're upgrading or starting fresh, take the time to find a system that fits and is ready to grow with your business.



About Roubler

Welcome to the future of workforce management. Our all-in-one HR and payroll software consolidate multiple workforce management functions into one easy to use, cloud-based system.

All Roubler features, including onboarding, time and attendance, rostering and payroll are connected by a single data source enabling you to manage employee information and HR tasks across the entire employee lifecycle on one platform.

With an inbuilt employee self service function available on iOS and Android, the information you need to onboard employees, create rosters, manage leave and run payroll is always up to date and ready to access wherever and whenever you need it.

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“The biggest thing is how much time it has freed up for me, where staff can onboard themselves and create their own unavailability which allows me to get out there and manage the business”

– Matt, Retail Store Manager, HG Retail

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“The staff and management have engaged with Roubler really quickly.”

– Chris Jolliffe, General Manager & Licensee, Potts Point Hotel

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