OrangeSky

MyOS

ROSTERING GUIDE

ROSTERING GUIDE

This guide is deep dive into rostering within MyOS! It builds on the information from the Volunteer Leader guide available in the MyOS Hub.

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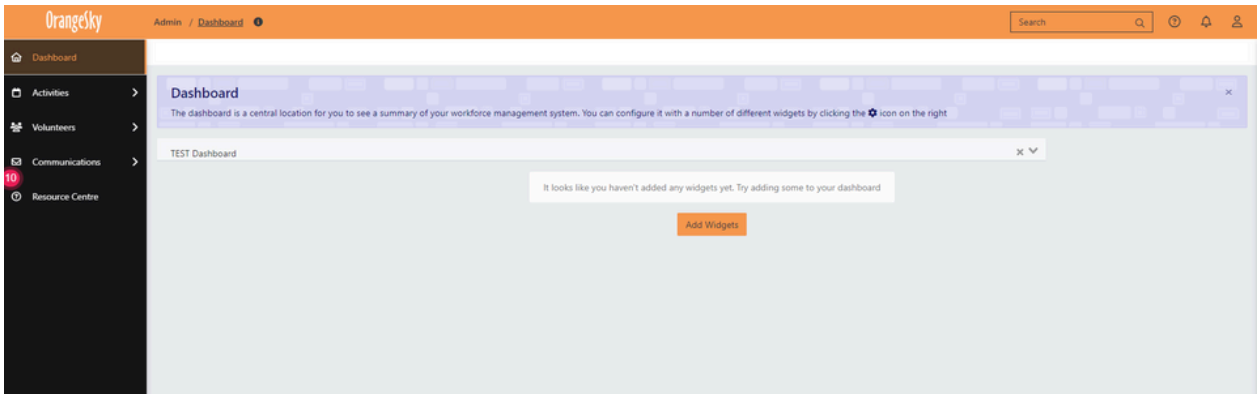
GETTING STARTED

Administrator View

With your Team Leader login, your MyOS will automatically open into the Administrator view below. This is where you'll complete the rostering of your team and create filters, which this guide will explore.



Creating a Filter

Before rostering, we suggest you create a team filter to easily view your volunteer team for rostering. You will only need to do this once, and can save the filter for all future rostering.

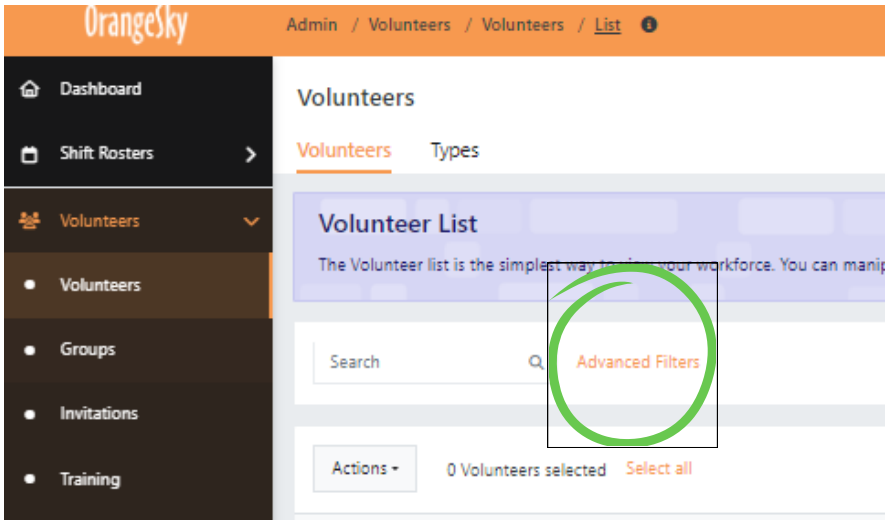
You can create a filter in the 4 steps here:

1. To start, select the **"Volunteers"** tab along the Navigation Bar and select **"Volunteers"** again.

*Please note that while your rostering is done within the **"Shift Roster"** tab, you'll need to be under **"Volunteers"** to set the filter up.*

2. Select Advanced Filter.

To create a filter, please select the orange **"Advanced filters"** button. Once you open Advanced filters, you can also see any current saved filters.



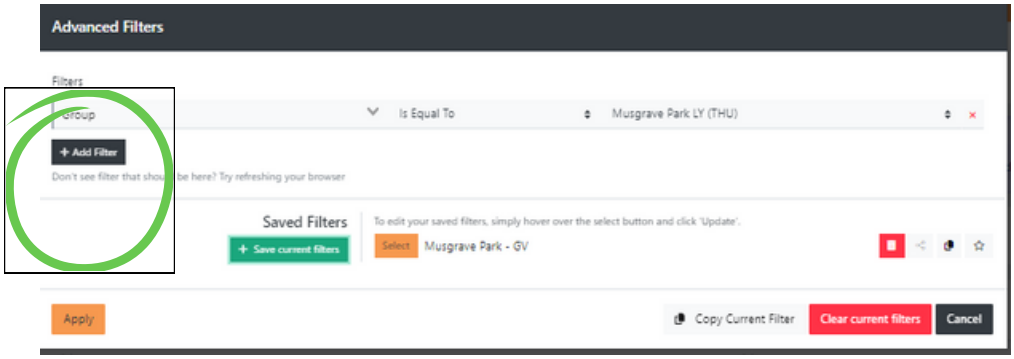
3. Create your first filter group.

You'll need to create a filter for each group of volunteers. For most team leaders, this will mean one group for general volunteers and one for drivers.

To create the filter click the black **"+Add Filter"** button in the advanced filter pop-up and please select the below drop-down options for the fields:

- **"Filters"** select **"Group"**
- **"Equal to"**
- Shift name e.g. "Musgrave Park"
- Once you've selected the group, click on the green **"Save current filters"** and name the filter e.g. "Musgrave Park - General Volunteer" and click "Save"

Once you've saved the filter, it will appear in your saved filters, like the below:



4. Repeat for any further groups

If you need to create any other volunteer groups (such as Drivers), repeat step 3 for the group.

Once you've saved this filter, it will also appear in your saved filters.

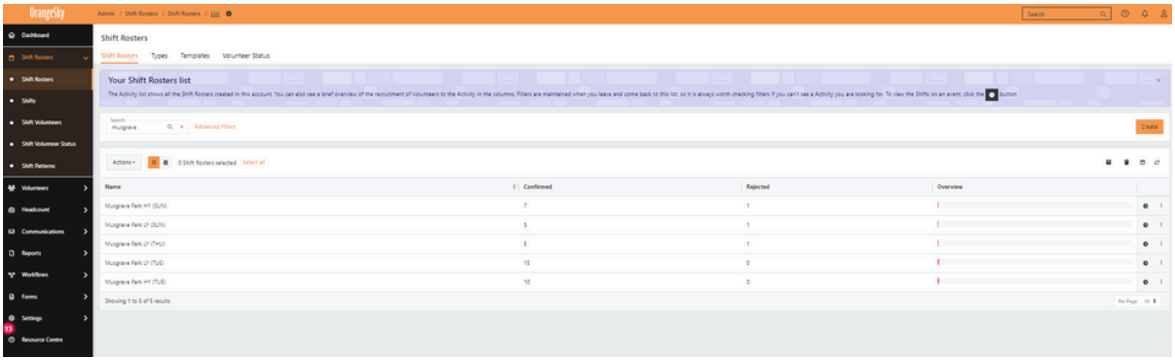
ROSTERING VIEWS

Rostering - Different Views
There are two ways you can view your team's roster, through the schedule view which gives you a bulk calendar view or your list view, which shows a single shift.

They have slightly different functions, which we'll go through in the guide. If you're working on a mobile phone or tablet, we recommend the list view.

To start rostering, click **"Shift Rosters"** on the Navigation Bar and select the **"Shift Rosters"** tab.

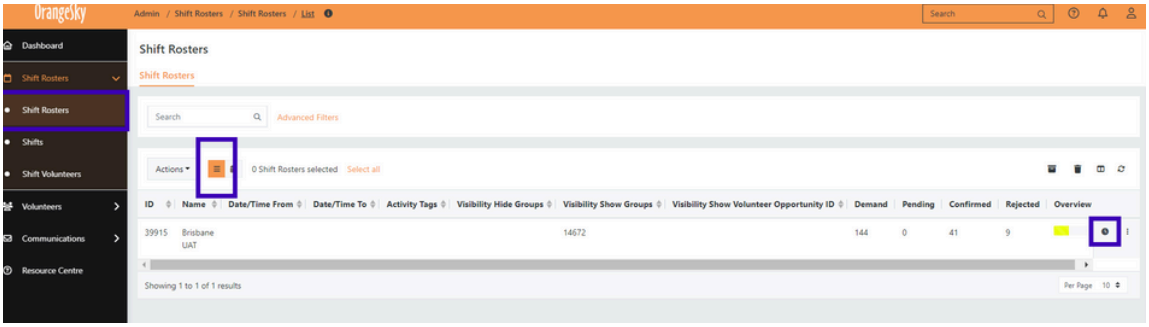
Once you're in your preferred rostering option (schedule view or list view), we recommend saving it as a bookmark on your desktop so that you can easily jump to it later!



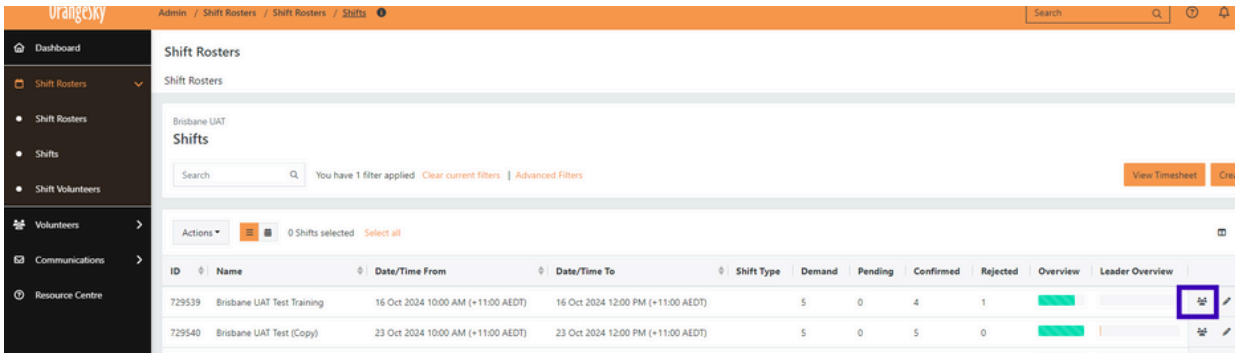
ROSTERING – LIST VIEW

Top tip: Save this page as a Bookmark!

List View

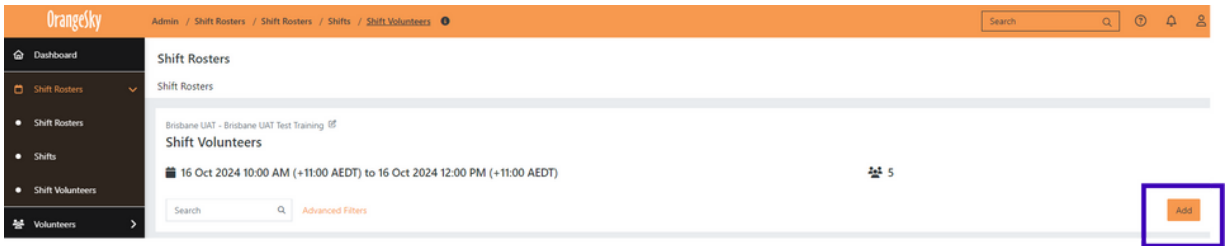


1. To roster in the list view, make sure the 'list icon' (*as pictured above*) is selected.
2. Click the '**clock icon**' on the right hand side, to **"view shifts"**. You will have a list of upcoming shifts by date.
3. On the day you would like to roster for, click the "**view volunteers"** people icon on the right hand side.



4. To add volunteers to a shift, select the orange **"Add"** button on the top right above the list of shifts. This will open a black **"Volunteer Search"** tab on the right hand side.

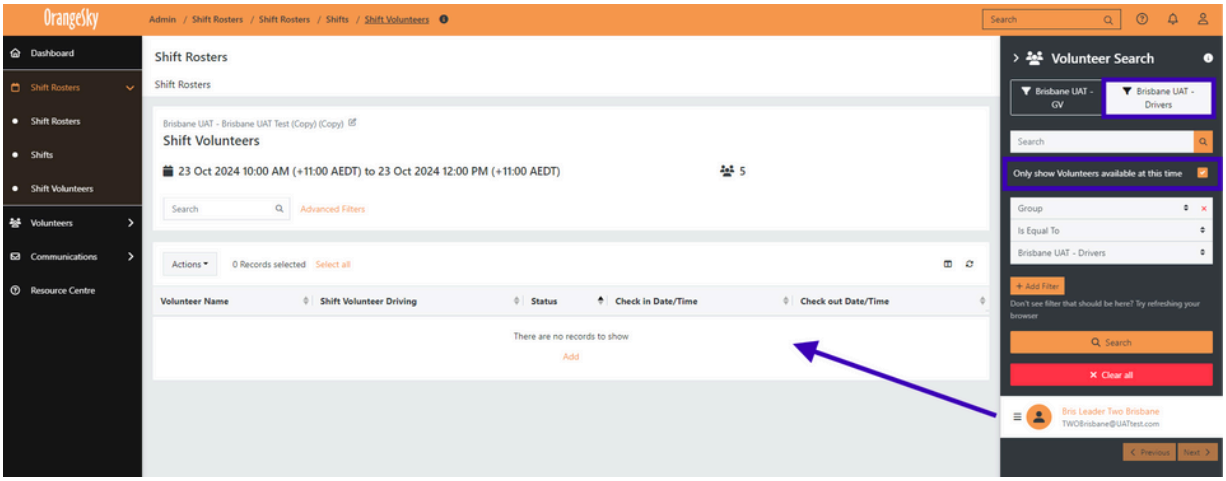
We'll now go through the steps to add each volunteer group to your shift from this search.

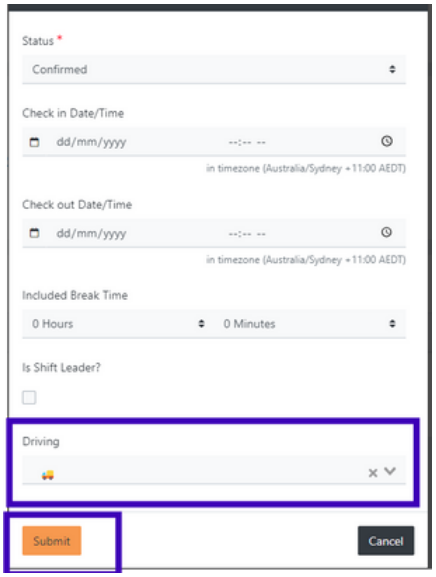


Rostering Drivers

If your shift has a driver, we suggest rostering them first.

1. Select the orange **"Add"** button on the top right above the list of shifts (see above). This will open a black **"Volunteer Search"** tab on the right hand side (see below).
2. To roster your driver, click on your saved filter, e.g. **"Brisbane Test - Drivers".**
3. Click the tick box for **"only show volunteers available at this time".** This will remove any volunteers who have marked themselves as unavailable for this time period.
4. Click the orange **"search"** button. All available volunteers will appear below.
5. Next, click the driver volunteer you would like to roster for this shift, and drag & drop them onto the rostered shift.





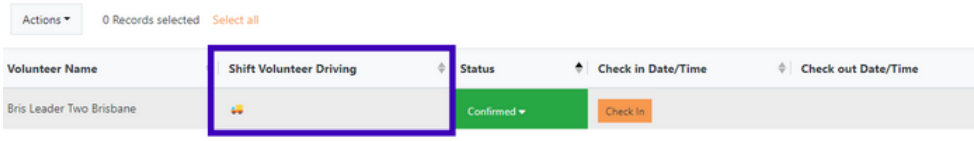
6. Once you drop & drag the volunteer on to the shift, the pop up here will appear.

Please keep the **"Status"** as **"Confirmed"** and leave the check in and check out times here *(do not add any times)*.

Using the **"Driving"** drop down, select the car icon. Click **"Submit"**.

On the roster, you will see the car icon against the driver.

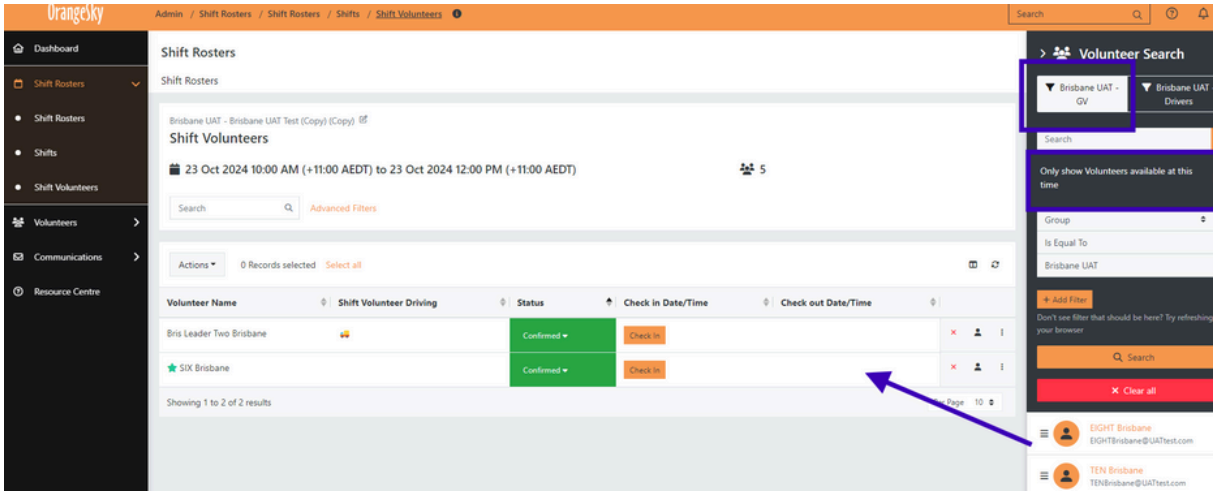
That is all you need to do for your driver. Next, you'll repeat these steps for each volunteer type.



Rostering General Volunteers

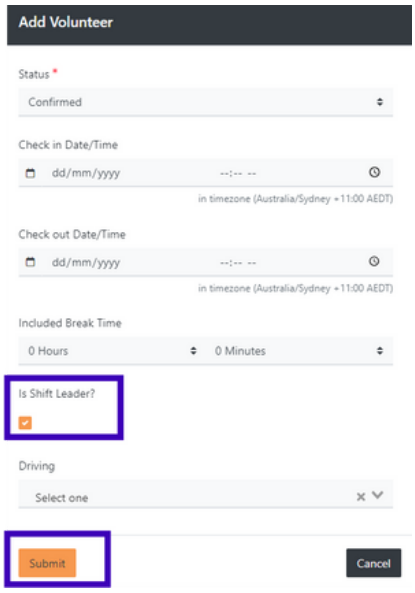
We'll now use the same steps as driver rostering to fill the rest of your volunteer shift.

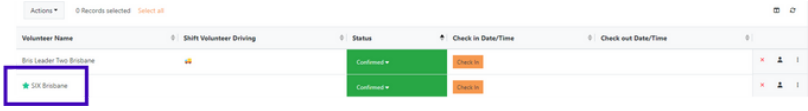
1. Select the orange **"Add"** button on the top right above the list of shifts (see above). This will open a black **"Volunteer Search"** tab on the right hand side (see below).
2. Click on your saved filter, e.g. **"Brisbane Test - General Volunteer"**.
3. Click the tick box for "only show volunteers available at this time". This will remove any volunteers who have marked themselves as unavailable for this time period.
4. Click the orange **"search"** button. All available volunteers will appear below.
5. Next, click each volunteer you would like to roster for this shift, and drag & drop them onto the rostered shift.
6. Click **"Submit"** on the pop up for each volunteer as they are placed on the shift. You don't need to adjust their status or check in times.



Rostering Shift Leaders

Before you finish your roster, make sure that you have a designated **Shift Leader**. Each shift must have an assigned Shift Leader. The Shift Leader will be assigned the shift report to complete, and can check volunteers in and out, or update the check in and out times if needed. If you're not able to attend, please select another volunteer comfortable with MyOS as the Shift Leader.





Follow the same steps 1 - 5 as above, where you drop & drag the volunteer on to the shift keep the **"Status"** as **"Confirmed"** and leave the check in and check out times here (*do not add any times).*

For the Shift Leader, tick the **"Is Shift Leader?"** box and click **"Submit".**

On the roster, you will see a star icon against the Shift Leader.

ROSTERING – SCHEDULE VIEW

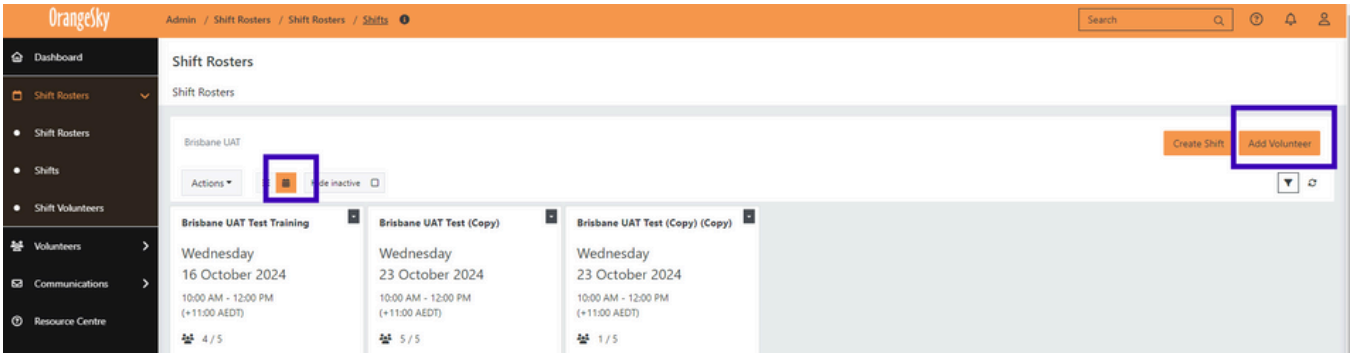
Switching views - Schedule View

We'll now show you how to roster in the schedule view. The easiest way to navigate to the calendar view, is to go back to the shift option from the top of the screen. To switch to the bulk or schedule view of rosters, please select the calendar icon, called **"Schedule View"**.

Alternatively, follow the below steps to navigate to the Schedule view from the Dashboard:

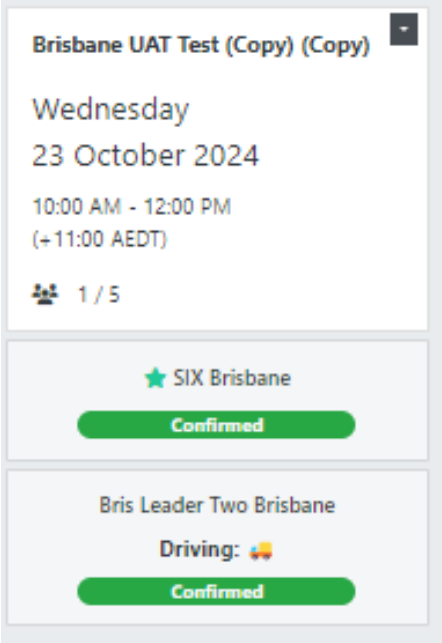
1. Select **"Shift Rosters"** on the Navigation Bar and select **"Shift Rosters"**.
2. Then click the 'clock icon' on the right hand side, to **"view shifts"**. You will have a list of upcoming shifts by date.
3. To switch to the calendar view, click on calendar icon below (called **"Schedule view"**) next to the Actions bar.

Now we'll start adding our volunteer groups below:

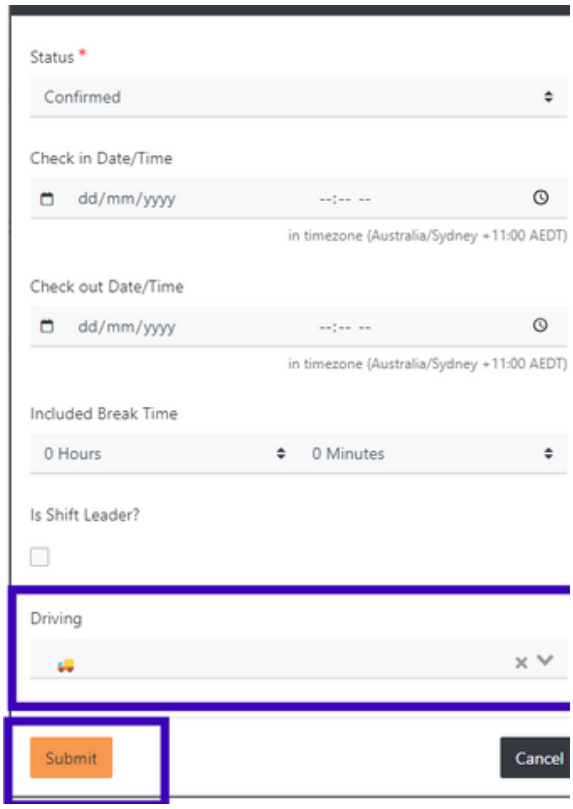


Rostering Drivers

1. Click the orange **"Add Volunteer"** button on the right. This will open a black **"Volunteer Search"** tab on the right hand side
2. When you click on **"Add Volunteer"**, your saved filter will appear at the top of the Volunteer Search. Simply click on the filter name to apply it. For your drivers, click on your driver filter at the top.
3. Then click the orange **"search"** button.
4. Click on the driver you want to roster and drag and drop them onto the space below the shift information box (see right).



5. Once you drag & drop the volunteer on to the shift, the pop up here will appear. (Please note that the pop up is the same in list view or calendar view).



Please keep the "**Status**" as "**Confirmed**" and leave the check in and check out times here ***(do not add any times).***

Using the **"Driving"** drop down, select the car icon. Click **"Submit"**.

On the roster, you will see the car icon against the driver.

That is all you need to do for your driver. Next, you'll repeat these steps for each volunteer type.

Rostering General Volunteers

We'll now use the same steps as driver rostering to fill the rest of your volunteer shift.

1. Select the orange **"Add Volunteer"** button on the top right above the shifts. This will open a black **"Volunteer Search"** tab on the right hand side.
2. Click on your saved filter, e.g. "Brisbane Test - General Volunteer".
3. Click the orange **"search"** button. All available volunteers will appear below.
5. Next, click each volunteer you would like to roster for this shift, and drag & drop them onto the space below the shift name.
6. Click **"Submit"** on the pop up for each volunteer as they are placed on the shift. You don't need to adjust their status or check in times.

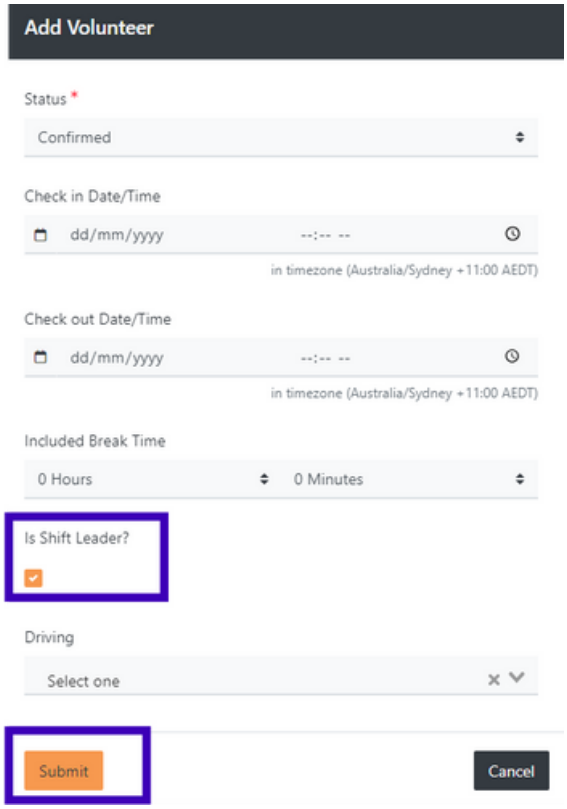
Rostering Shift Leaders

Before you finish your roster, make sure that you have a designated Shift Leader. Each shift must have an assigned Shift Leader. The Shift Leader will be assigned the shift report to complete, and can check volunteers in and out and change check in and out times if needed. If you're not able to attend, please select another volunteer comfortable with MyOS as the Shift Leader.

Follow the same steps 1 - 5 as above, where you drop & drag the volunteer on to the shift keep the **"Status"** as **"Confirmed"**.

For the Shift Leader, tick the **"Is Shift Leader?"** box and click **"Submit".**

On the roster, you will see a star icon against the Shift Leader.

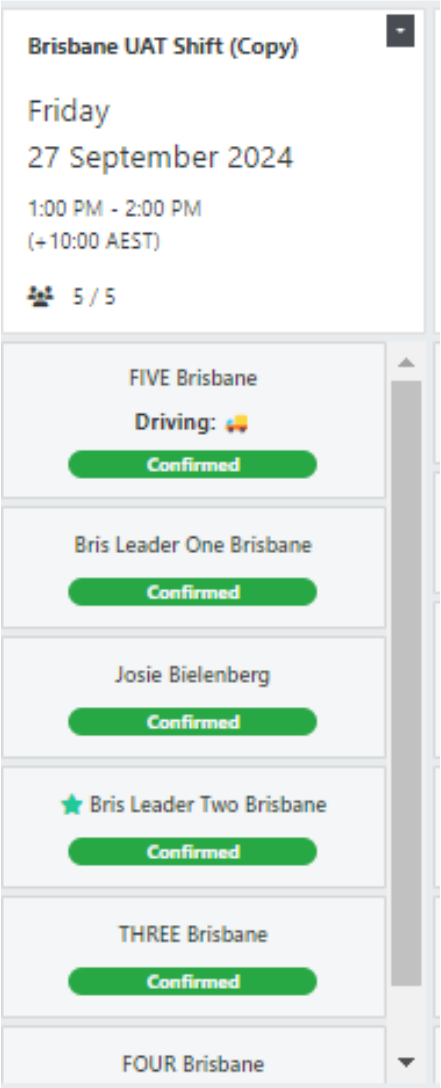


ROSTERING TIPS

Reviewing the Roster

Once you've finished these rostering steps, have a quick review of the final group.

You should see within the group that there is someone with a green star as the designated shift leader and a driver with the orange truck next to them.



Note: when rostering in 'schedule view' there are a few differences.

- There is no "only show volunteers available at this time". This is because the system does not know which specific date an unavailability aligns to. If you roster a volunteer on a shift on a date they are unavailable the above pop-up will appear.

- You can drag & drop volunteers from one shift to another. This works like copy & paste and means you can easily drag volunteers from one shift into another.

Roster Alerts

Rosters are automatically published in MyOS, however, volunteers are not alerted immediately when added to a roster. This allows you to freely edit and adjust your roster without worrying about sending multiple notifications.

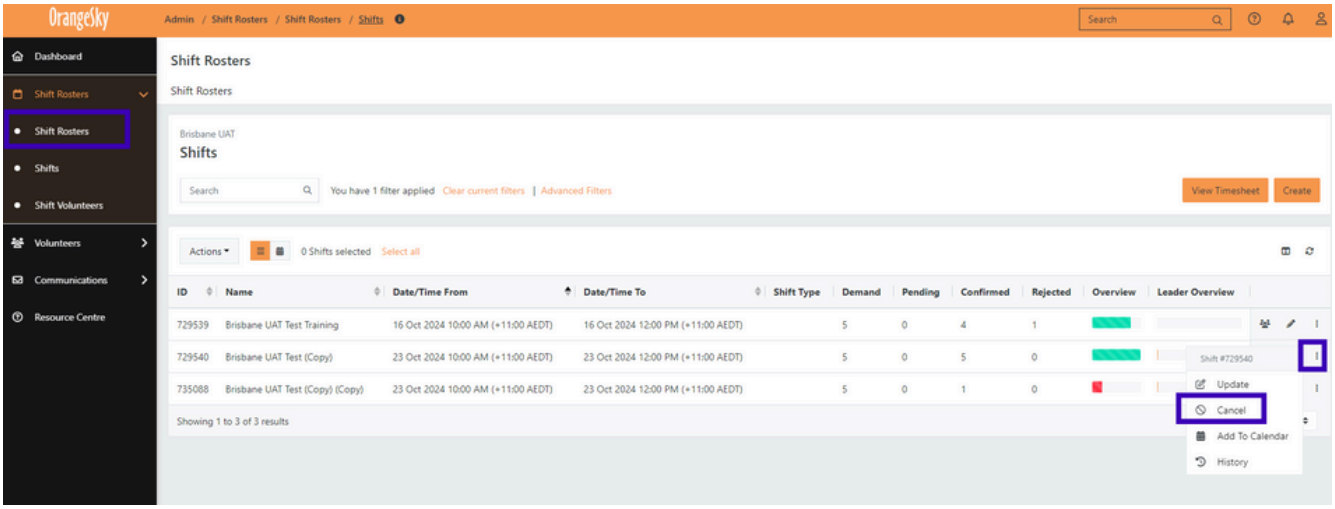
Rostered volunteers will receive a shift reminder 1 month, 14 days and 48 hours before their rostered shift. They do not need to confirm shift acceptance, but they can withdraw.

When you complete a roster, we suggest that you let your team know (on WhatsApp) to jump in to MyOS and view their '**Upcoming Shifts**' on their MyOS Dashboard.

Cancelling a Shift

You may need to cancel a shift, for reasons such as lack of volunteers or inclement weather.

To cancel a shift in MyOS, please navigate to the Admin View. Go to **"Shift Rosters"** under **"Shift Rosters"** and click on the **'clock icon'**. Click the three dots next to the shift you're looking to cancel. From the drop down menu, please select **"cancel"**. A pop up will open to confirm if you'd like to cancel the shift. The volunteers for that shift will be notified.



Shift Withdrawal

Volunteers can withdraw from a shift anytime up until 47hrs prior to the shift start time. You will not receive an alert when a volunteer withdraws, however, you can see via the roster in MyOS.

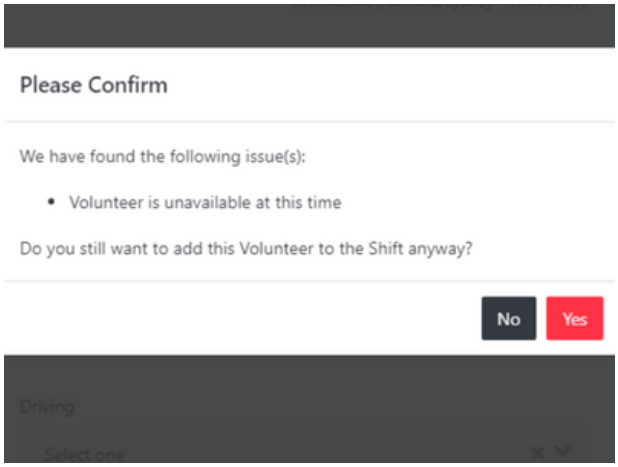
A volunteer cannot withdraw 47hrs prior to shift and will instead be prompted to contact their Team Leader to advise they cannot attend. This ensures that last minute changes aren't made without you being made aware and gives you time to update your roster.

Volunteer Availability

MyOS assumes volunteers are always available unless they add an unavailability. As we showed above, when rostering in the calendar "**Scheduled view"** the system doesn't know what date the unavailability sits on.

If you try to drop an unavailable volunteer on the roster, it will share a pop-up that they're unavailable. Unless the volunteer has agreed to the shift, click **"No"** on the pop-up.

For the best view of unavailable volunteers, use the "**List view"**.



ROSTERING – FAQs

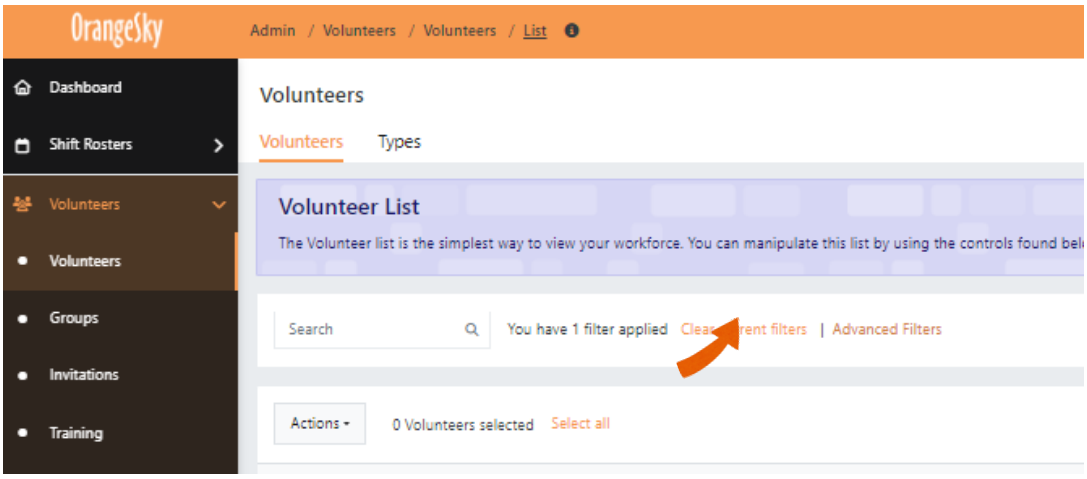
Why can't I see my saved filters?

There are a few reasons your filter might not be working.

Firstly, check that any previous filters have been cleared. To clear any filters, click on the orange button **"clear current filters"** (pictured below).

Secondly, try refreshing your screen. Your filter might not apply if you haven't refreshed the screen.

Third, check to make sure that your filter has been saved. You can apply a filter, but to save it for future use, make sure you use the green **"Save current filter"** when setting it. To set up a saved filter, see the instructions on page 2 **"creating a filter"**.

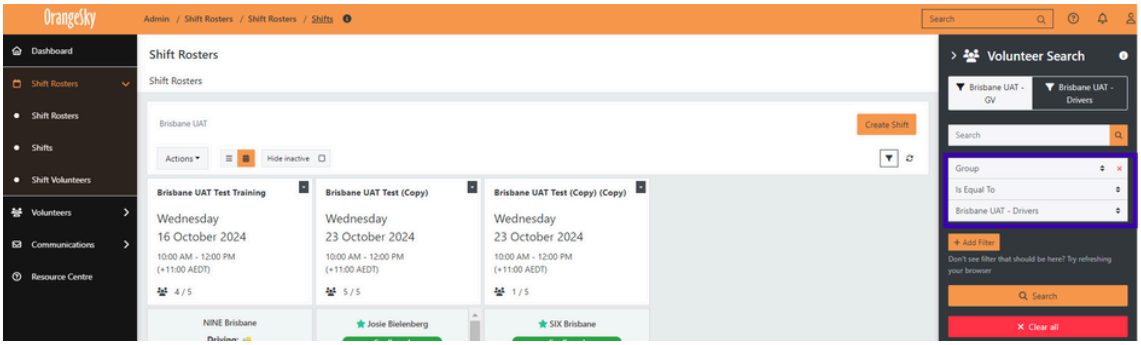


Remember that we're here to help! If you're having trouble with the filter, please reach out. We can create and share a filter with you!

I haven't saved a Filter. Can I roster without one?

If you haven't saved a filter, you can set a filter directly from the shift roster. Click the **"+Add Filter"** button and select the below drop-down options for the fields (as seen in the below image):

- **"Filters"** select **"Group"**
- **"Equal to"**
- Shift name e.g. "Brisbane Test - Drivers".
- Click **"Search".**

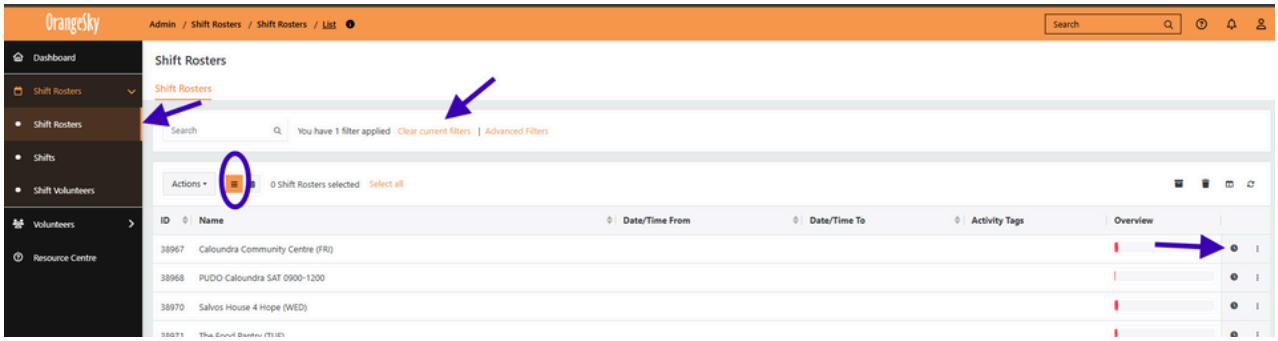


I can't view my teams roster – what should I do?

Firstly, check that you're in the **"Shift Rosters"** section under **the "Shift Rosters"** tab on the right hand side navigation bar.

Secondly, check to see if any filters are saved or applied. If they are, simply click on the orange "Clear Current Filters".

Thirdly, make sure you're in the **"List view"** not the **"Calendar view"**. To navigate between these, click the "List view" next to the **"Actions"** bar. To roster, click the **"view shifts" clock icon** on the right hand side.



Nobody was able to do a shift report. What should I do?

Every shift should have a Shift Leader who completes the shift report. When you've finished the roster, make sure that someone on the shift is listed as the Shift Leader and has the green star next to them.

If the Shift Leader was unable to pop the report in, you can do this from the **"Shift Rosters"** section. Go to the roster via the **"view shifts"** clock icon on the right hand side. Click the people icon **"view volunteers"** icon. Against the Shift Leader (*green star)* click the person icon **"quick update record"**. In the pop-up, use the "Impact" tab to fill in the shift report information.

MyOS SUPPORT

For further support on **MyOS**, you can access the Volunteer Resource Hub **here** to view **MyOS Hub Resources**.

MyOS Hub Resources are specially designed to support your transition, with a range of resources and support opportunities including:

- Learning Modules
- Training videos
- Submit a question
- Book in 1:1 support
- Log an issue
- Share an improvement

We encourage all volunteers to seek support from the resources in the **MyOS Hub**, and to reach out/book in 1:1 support if you're still struggling to access the resources you need.

MyOS is designed to simplify shift experience and streamline systems so you can focus on the important stuff - positively connecting communities.

Thank you for your continued commitment to friends doing it tough.

Need further support?

AU - 07 3067 5800
NZ - 9 801 6455

AU - volunteer@orangesky.org.au
NZ - volunteer@orangesky.org.nz