



# Microsoft 365 Adoption

## Scenario 4 : Roster Management

July 2023



# Agenda

- List of Scenarios
- Scenario Details, Description and Demo
- Resources
- Next Steps



# Scenarios



## Team Collaboration

- Better Meetings
- Document Collaboration
- Managing Team Tasks
- Project Teams
- Effective Committees

Frequency: High

Scale: High

Complexity: Medium

Innovative: High

Benefit: High



## Managing Work

- My Tasks
- Managing Team Tasks
- Project Tasks
- Meeting Actions
- Flagged Emails

Frequency: Medium

Scale: High

Complexity: Medium

Innovative: High

Benefit: High



## Effective Communication

- Department Hub
- Alerts & Messaging
- Announcements and News
- Recognition
- Stakeholder Engagement

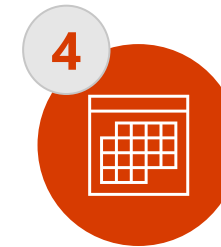
Frequency: Medium

Scale: High

Complexity: Medium

Innovative: Medium

Benefit: High



## Roster Management

- Document Collaboration
- Managing Team Tasks
- Approvals
- Effective Communication

Frequency: Low

Scale: Medium

Complexity: Medium

Innovative: High

Benefit: High



## Workshops and Webinars

- Better Meetings
- Webinars
- Managing Team Tasks
- Registrations and Logistics
- Canvas (Whiteboard)

Frequency: Low

Scale: High

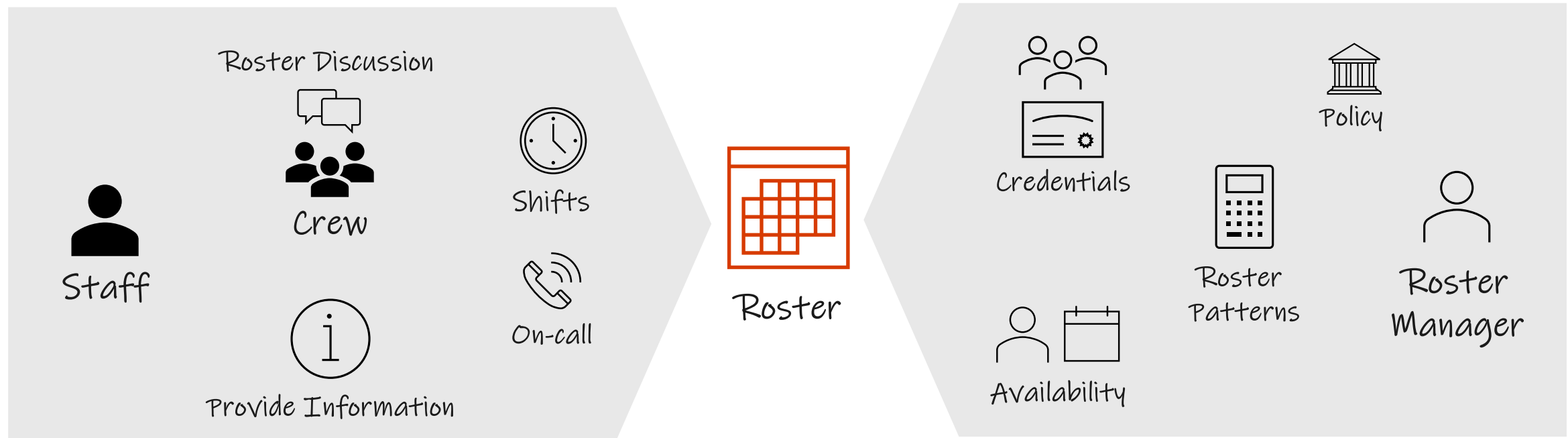
Complexity: Medium

Innovative: Medium

Benefit: Medium

**Next Phase Scenarios:** Forms & Workflow (PowerAutomate, Forms, Approvals); Roster Mgt 2.0 (Shifts); Communications 2.0 (Viva Engage); External Collaboration

# Roster Management



## ■ Stop

- Stop relying on emails.
- Manual entering of leaves data
- Stop emailing for leave information or approvals
- Reduce the effort to save and share the latest version in SharePoint for HQ which is password protected.
- Reduce the effort to set password to protect document
- Stop using Google sheet for maintaining pharmacy roster.
- Stop using different excel tracker to manage and plan leave.

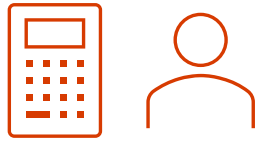
## ▶ Start

- Use M365 tools for managing rosters and leave requests
- Share and maintain the common version of the Roster.
- Maintain a common platform for all to view updated leaves (approval and requests)
- Work on a shared document to save time..
  - > More effective use of time and reduce the effort to remember password
  - > Work directly on the document daily if required to update
  - > Less calls to ask for password
- Allows other healthcare professional to have an overview of our pharmacist roster
- Leave management through centralized spreadsheet at a shared location

## ▶▶ Continue

- Pre-plan leave, submit leave requests promptly.

# Roster Management



## Roster Development

- Roster Managers develop their rosters based on existing patterns, policies and availability of staff.
- The spreadsheet containing the calculations is stored in a Teams Workspace, in a Roster Channel.
- Edit and read permissions are managed by the Roster Manager.
- Staff on the Roster are tagged in the Teams Workspace by the kind of role they fill in Rosters.



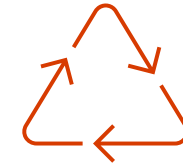
## Requests

- Staff update their availability and lodge leave requests.
- Staff wishing to swap shifts can make their requests in the Roster Channel for their team, tagging the role they are wanting to swap.
- Staff notify their sudden un-availability and on-call staff are notified.



## Publishing & Updating

- In line with policy and procedure, rosters are published in advance.
- Staff are able to view a copy of the roster but not make changes themselves.
- Staff may request changes and the roster may then be updated by a Roster Manager.
- Based on changes, the Roster Manager makes changes to the roster and re-publishes it.
- Staff are notified that the Roster has been updated.



## Continuous improvement

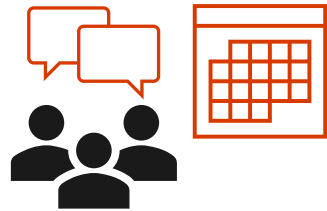
- Feedback on Rosters is collected and reviewed.
- Changes to Policy, Procedure and patterns are made through a regular improvement cycle.
- Changes to policies, procedures and patterns are communicated to Roster Managers and staff.



# Roster Management

## Roster Development

### 1 Roster channel in your Team



Create a channel in your Team's workspace for Rosters. Set it to appear in everyone's channel list.

This will provide a dedicated chat for rostering and a place for rostering information.

Provide tabs at the top of the channel that link to relevant policies, procedures and resources. Create a channel calendar.

This can also link to a **read only** view of the current roster.

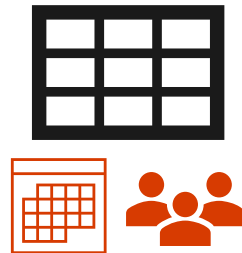
### 3 Set up role Tags



The owners of the workspace can assign people to Tags.

These tags can then be used to mention in chat, with people having that tag, receiving notifications. (e.g. @RosterMgrs, @Nurses, @Therapists, @Orderlies etc..)

### 2 Roster spreadsheet



Store the roster spreadsheet in the Files tab of the channel.

Manage the appropriate permissions for viewing and editing the roster spreadsheet.

# Roster Management

## Requests

### 1 Make requests



There are several different ways people can make requests. Choose one of the following:

1. Make requests in the Roster chat @mentioning the Roster Managers (@RosterMgrs tag),
2. Email the Roster Managers,
3. Put an entry into the Channel Calendar or
4. Record their requests in a List.

Work out the best solution for your team.

### 3 On-call



One or more on-call people can be mentioned in the chat and receive notifications that they are required on shift.

This should be used in conjunction with other notification methods (e.g. Phone Call, Email)

### 2 Swap shifts



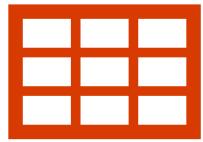
People can post in the Roster Chat for shift swaps.

They can @mention the Tag for their role or specific people to find the right people.

# Roster Management

## Updating & Publishing

### 1 Updating the roster

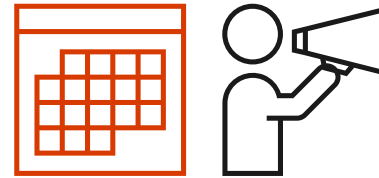


Based on the needs of each shift, the availability of suitable people and the requests they have made, the roster is prepared and updated by the Roster Manager.



They have permission to edit and change the roster, whilst other team members only have read permissions.

### 3 Communicating the roster



An announcement is made in the Roster channel chat, notifying the roster and linking to it.

This can be complemented with an email message to the team.



### 2 Publishing the roster



Review and approval of the roster takes place in line with policies and procedures.

A fixed version of the roster is published to the Team's workspace.



# Roster Management

## Continuous Improvement

### 1 Gathering feedback



On a quarterly cycle, people are asked for feedback on the rostering process and to provide ideas for improvement.

People do not have to wait to be asked and can share their ideas at any time by posting into the Roster chat channel.

### 3 Managing the change



Identify, develop and leverage a network of Roster Champions to help communicate any changes to rostering practices and tools.

Communicate the changes using announcements in the Roster channel that share information and instructions.

Share the changes during team meetings and newsletters.

### 2 Assess changes



Feedback and ideas are validated and collated.

They are analysed and prioritised based on risk, benefit and cost.

Initiatives are undertaken to make the improvements and prepare to communicate the changes.

# Future Capabilities

The following capabilities may become available in Microsoft 365 at some point in the future.

## Shifts

**Shifts** in Microsoft Teams (desktop and mobile apps) allows you to create, update, and manage schedules for your team.

**Schedules** - Create, edit, and manage a schedule. A schedule displays days at the top, team members appear on the left, and assigned shifts appear in the calendar.

**Groups** - Name a group like a job type or location to keep your groups organised.

**Shifts** - Choose where to add a shift. Create it from scratch, or copy an existing one.

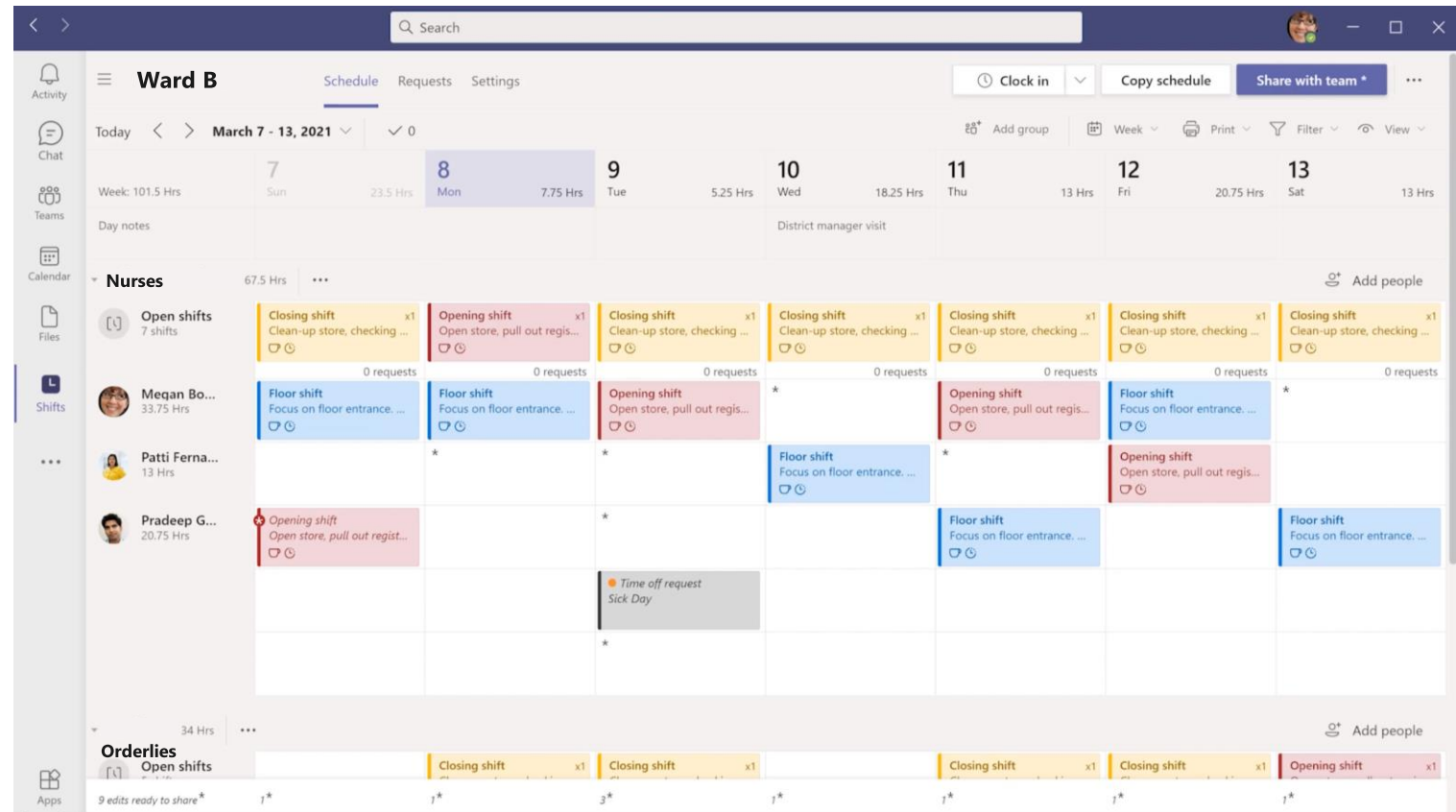
**Open shifts** - Each schedule has an open shifts row showing what is available in that week.

**Time Clock** - Let your team clock in and out of a shift with a mobile device.

**Requests** - Review requests for time off, shift swaps, or offers.

**Tags** - Use shift-based @tags to quickly communicate with anyone currently on shift.

**Share** - Once you finalise a schedule, share it with your team so everyone is up to date.



The screenshot shows the 'Shifts' interface in Microsoft Teams for a group named 'Ward B'. The interface includes a search bar at the top, navigation tabs for 'Schedule', 'Requests', and 'Settings', and a 'Clock in' button. The main area displays a calendar for the week of March 7-13, 2021. The calendar shows shifts assigned to team members: Meqan Bo... (33.75 Hrs), Patti Ferna... (13 Hrs), and Pradeep G... (20.75 Hrs). Shifts are color-coded: yellow for 'Closing shift' (Clean-up store, checking...), blue for 'Floor shift' (Focus on floor entrance...), and pink for 'Opening shift' (Open store, pull out regis...). A grey box indicates a 'Time off request Sick Day' for Pradeep G... on Tuesday. The interface also shows 'Open shifts' rows for each day, indicating available shifts. The bottom of the screen shows 'Orderlies' with 'Open shifts' and 'Closing shift' options.

# Self-help & Learning Resources for Champions

## Microsoft (Generic)

- [Microsoft 365 Quick Starts - Microsoft Support](#)
- [Microsoft 365 Training](#)
- [Microsoft 365 – YouTube](#)
- [Microsoft Teams Blog - Microsoft Community Hub](#)
- [FastTrack Resources \(microsoft.com\)](#)
- [Microsoft Teams – Microsoft Adoption](#)
- [Download Office Training Center Bill of Materials from Official Microsoft Download Center](#)
- [Microsoft Teams – Microsoft Adoption](#)
- [Microsoft Teams Adoption Guide](#)
- [Try it with templates - Microsoft Support](#)

## IHiS (Internal)

- [Tutorials On Using Microsoft 365 Products](#)  
(Available on HealthSG Tenant)  
Please reach out to internal Transformation Office/Change Team if you cannot access or further learning resources' links.