

# Checklist for setting up a new site on HosPortal

Version 3: 15 September 2022

Item	Location on HosPortal	Responsibility	Done?
1. Set up site and enable site administrators	Admin > Site administrators	HosPortal	
2. Define roles, skills and teams			
1(a) Define roles and level of breakdown or roles (i) e.g1. just Registrar, or define Registrar AT1 separate from Registrar AT2 (ii) e.g2. just Consultant, or define VMO separate from Staff Specialist	Admin > Roles	Joint	
1(b) Determine if Skills and Teams are to be used on personnel or roster	Admin > Teams Admin > Skills	Joint	
1(c) Define users: complete and upload a spreadsheet of all users using HosPortal's Excel spreadsheet format, including for each user their name, role, email, mobile. If relevant: skills, teams, start date and end date.	Staff > Import	Customer	
2. Define roster groups and overall roster structure			
2(a) Define roster groups: names, icons, week names, standard session times	Admin > Roster Groups	Joint	
2(b) Define activity-based rosters: (i) name, shift times, colours, application on holidays (ii) users eligible to do shifts (iii) exceptions	For each roster group: Admin > Add	Customer	
3. For each roster group			
3(a) Define possible locations and activity names	Admin > Locations	Customer	

3(b)	Define tags, if relevant	Admin > Roster tags	Customer
3(c)	If you are using terms, for instance for trainees or rotating staff: create the terms and define the term dates.	Admin > Terms Admin > Term dates	Customer
3(d)	Enter roster templates. This is a collaborative and iterative exercised between HosPortal and the Customer, with the detailed templates to be entered by the Customer under HosPortal's guidance. Refer video overview here.	(roster page) > Templates	Joint, then completed by Customer
3(e)	Add user templates to rosters and allocations	(roster page) > Templates	Joint, then completed by Customer
3(f)	If you are using patterns, create the roster patterns	Admin > Patterns	Customer
3(g)	Add unallocated sessions to staff	(review with HosPortal)	HosPortal
4.	Set rules, reminders and alerts		
4(a)	Define shift conflict rules and shift separation rules	Admin > shift conflict rules	Customer
4(b)	Set shift reminders and admin reminders for vacant shifts	Admin > Shift reminders	Customer
4(c)	Set event-based shift alerts	Admin > Shift alerts	Customer
5.	Define market and shift swap rules		
5(a)	Set rules for what shifts can be swapped and transferred, and what permissions are required for each role and roster	Admin > shift change request rules	Customer
5(b)	Set rules for who can use the market	Admin > Shift market rules	Customer
6.	Define leave and enter pre-existing leave		
6(a)	Define allowable leave types	Admin > Leave types	Customer

6(b)	Define leave approval process	Admin > Leave request rules	Customer
6(c)	Define leave alerts	Admin > Leave alerts	Customer
6(d)	Upload existing leave using standard Excel format	Leave > Import	Customer (with HosPortal assistance)
7.	Review site holidays: days that are treated the same as public holidays that are not state-wide proclaimed holidays, such as shut-down days.	Admin > Site holidays	
8.	Set up self-roster processes		
8(a)	If using the self-roster function, define rosters, participants and quotas. For other than simple selections or preferences on single rosters, be sure to talk to HosPortal first.	(roster page) > Self-roster	HosPortal initially
9.	Build rosters		
9(a)	If using terms, apply users to terms	Admin > Term users	Customer
9(b)	If using other templates, draft shifts from templates	(roster page) > Edit	Customer
9(c)	Edit rosters	(roster page) > Edit	Customer
10.	Invite users and make site live		
10(a)	Amend permissions in readiness for go-live: remove site administrators no longer required; create additional permission groups as necessary	Admin > Site administrators  Admin > Permission groups	Customer
10(b)	Review welcome message and help pages to be sent to new users		HosPortal

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10(c)	Review final setup with HosPortal		Joint
10(d)	Make site live. This will automatically invite all your users to set up their logins, and will enable shift reminders and other communications and alerts.	Admin > Site details	Joint
10(e)	Publish rosters	(roster page) > Edit	Customer

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