Global Settings in Cloud Roster

Roster Cloud · https://cclearninghub.co.uk/docs/global-settings-in-cloud-roster/

Global Settings in Cloud Roster

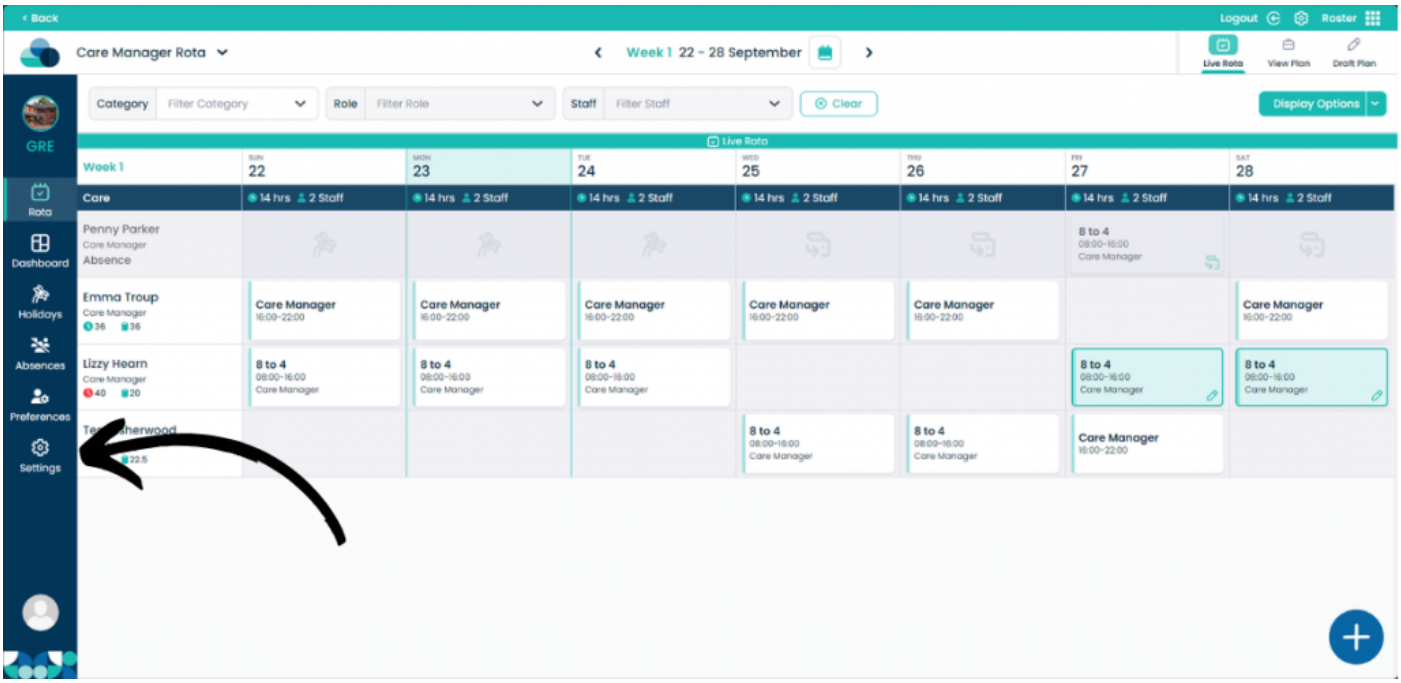
What You'll Learn in This Guide:

- **How to access the Global Settings panel** in the Cloud Roster settings area.
- **How to configure your organisation type** (e.g. Residential or Nursing Home) and customise default messages via the Messages tab.
- **How to define default shift breaks**: set break names, minimum shift lengths, break durations, and customise breaks per staff member.
- **How to establish shift limits** by role and category, including exclusive limits and requiring supervisor approval when exceeded.
- **How to set up alerts and warnings**: configure dashboard notifications, toggle specific alerts, and set consecutive-day work thresholds.
- **How to use miscellaneous options** that support shift coverage and same-day rota adjustments.



Step 1:

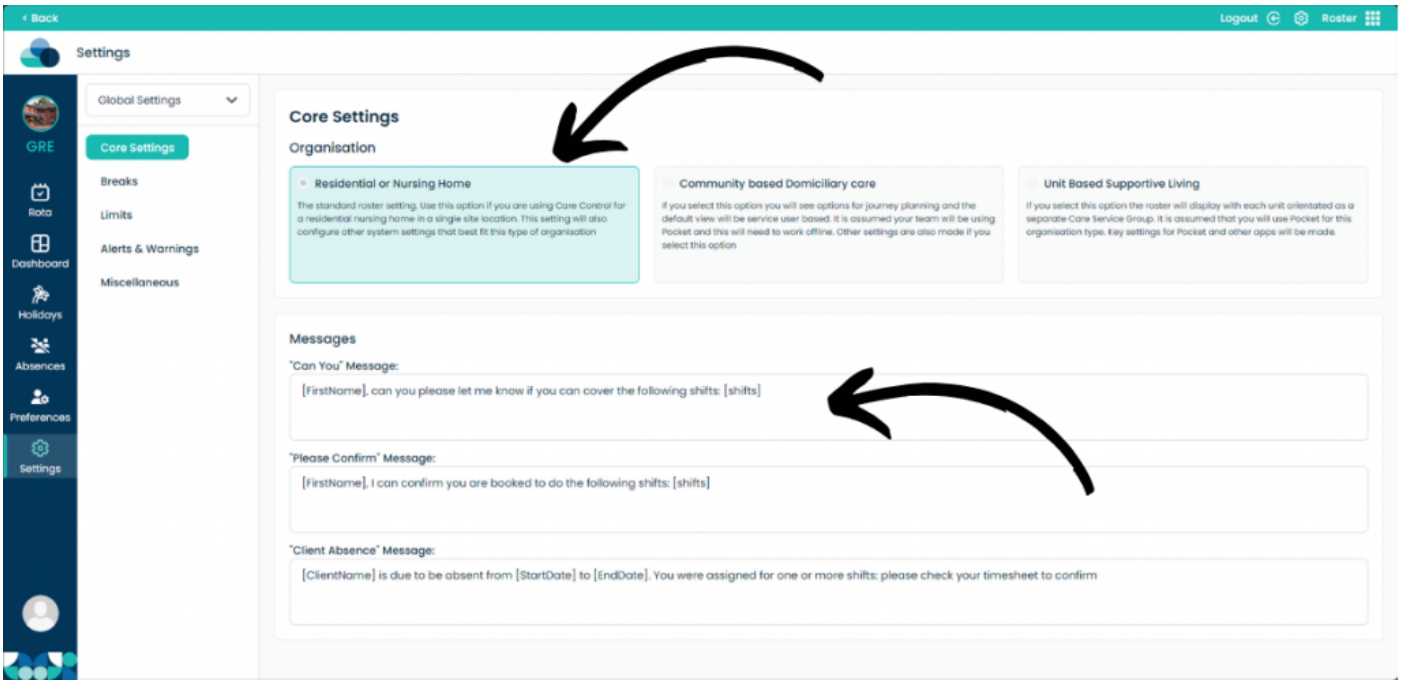
Navigate to the **Settings** page of Roster.



Step 2:

On the **Core Settings** page you can select which type of **Organisation** you are. Currently we only have support for **Residential or Nursing Home.**

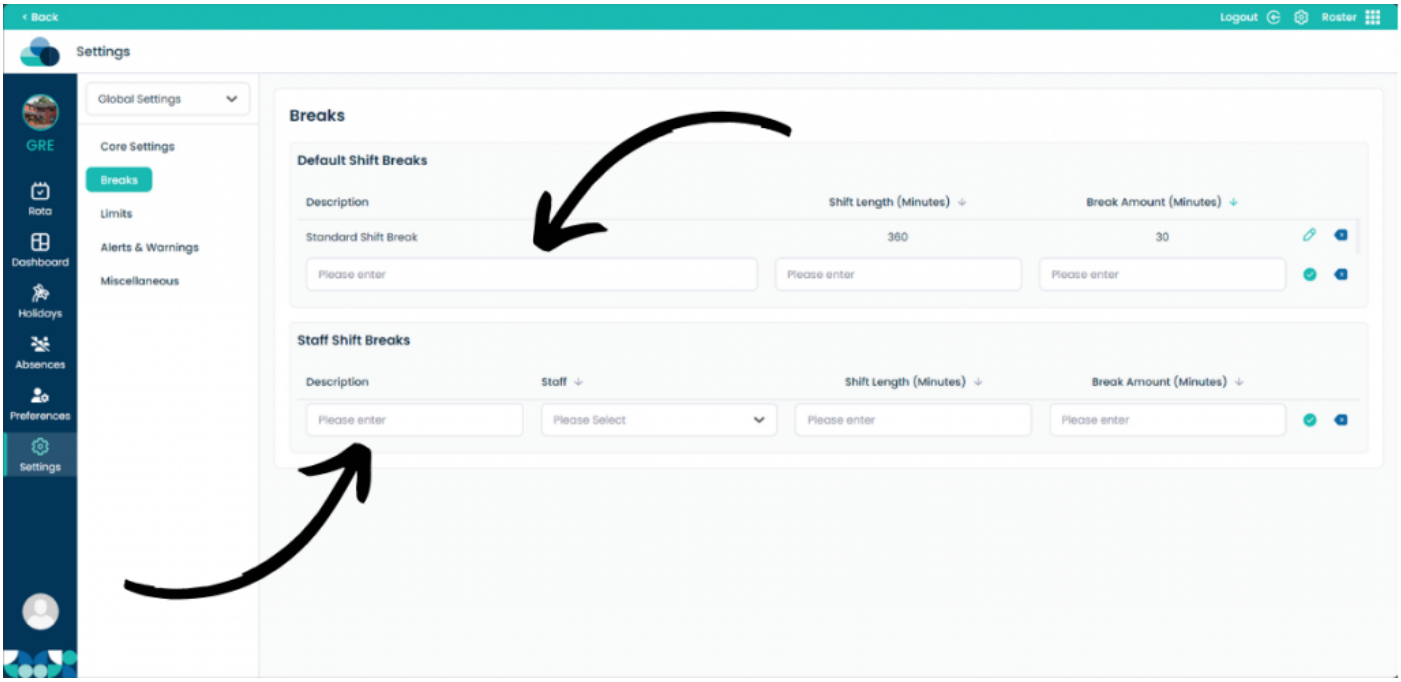
In the **Messages** tab you can modify what the default messages are for each message.



Step 3:

In the **Breaks** page you can modify what the **Default Shift Breaks** are. In the left hand box you type the **name** of the break. In the **Shift Length** box you can enter the minimum shift length for the break to trigger. You can then add the **Break Amount** in the final box. Once happy click the **Tick** to confirm the break. You can also delete the breaks with the **cross** or modify the break with the **pencil** icons.

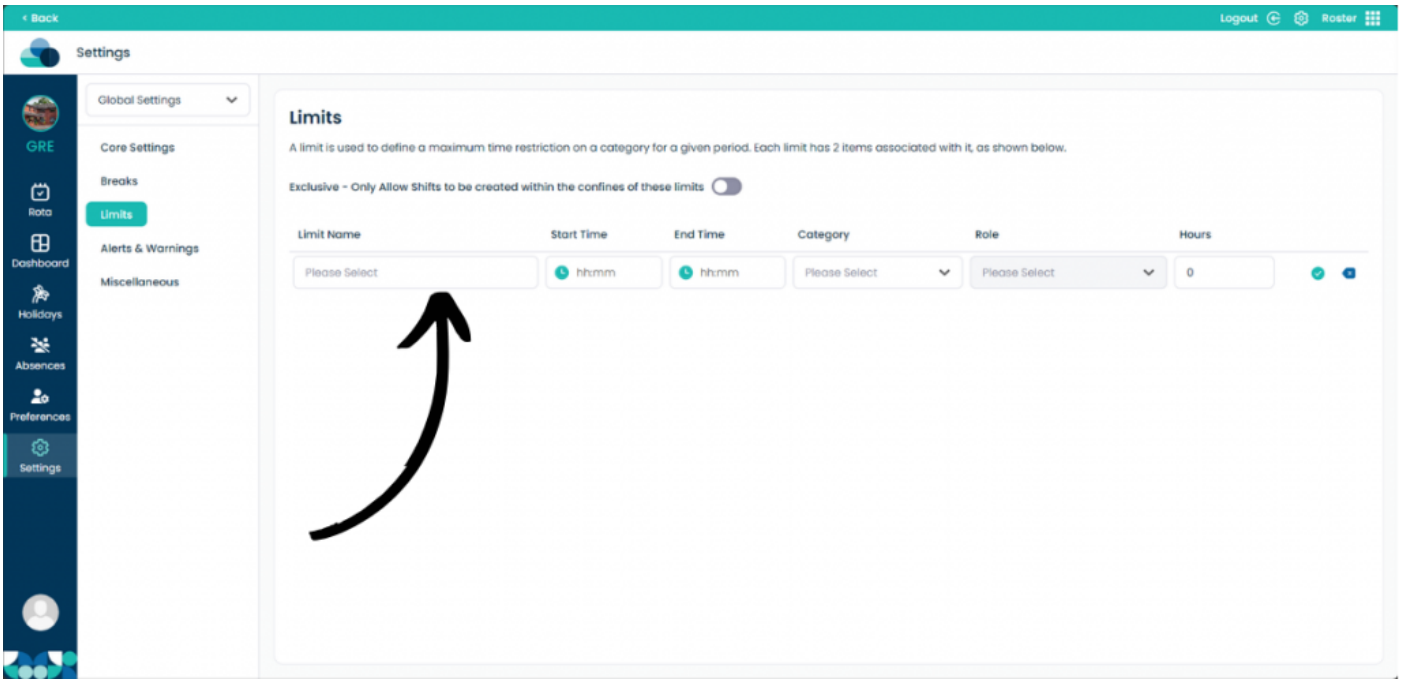
You can also modify individual **Staff Shift Breaks** if a staff member requires special break times.



Step 4:

On the **Limits** page you can set limits for the staff members. Here you can set the limit for how long a shift can be for a **category** and **role.** You can also set them as **Exclusive** which will mean that shifts can only be created within these limits.

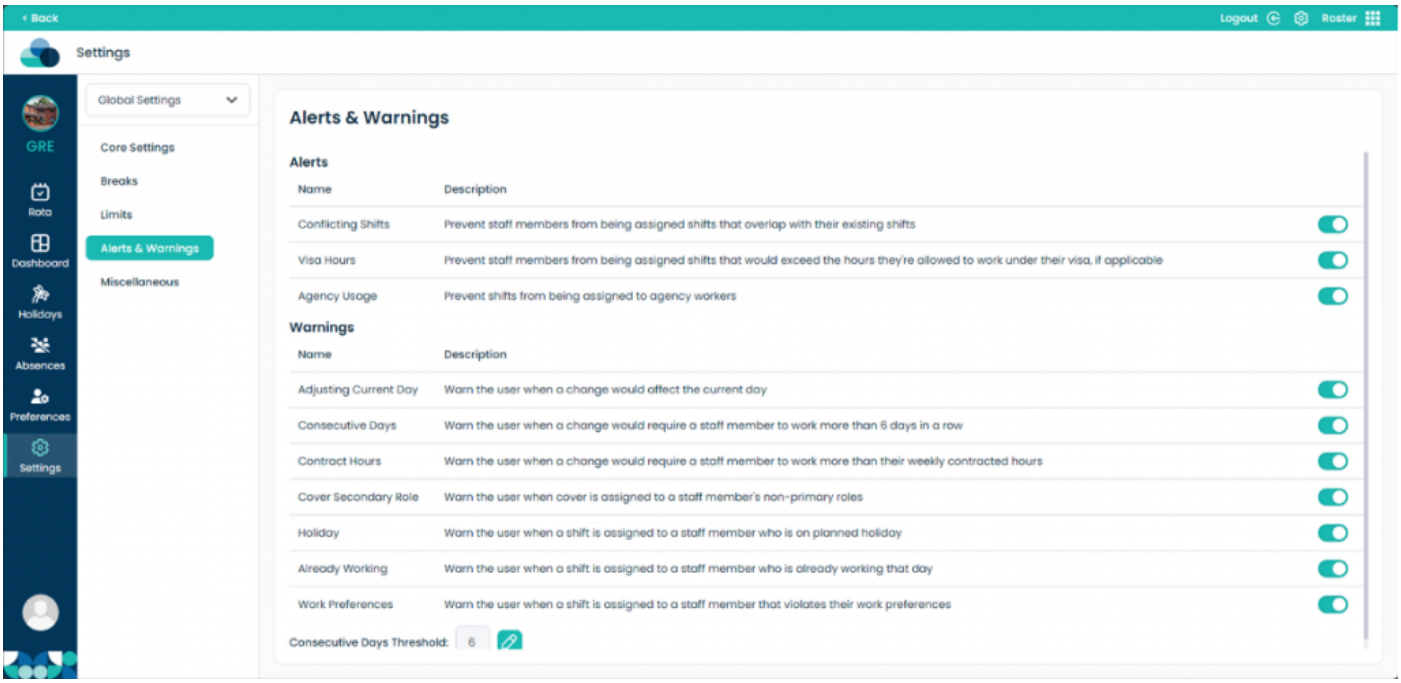
If a staff member tries to exceed these limits it will have to be confirmed by a higher staff member later on.



Step 5:

Alerts & Warnings page will display what warnings will be shown on the **Dashboard** . You can toggle each of the individual **Alerts** or **Warnings** using the toggle on the right hand side.

You can also set the **Consecutive Days Threshold** which will warn you if a staff member has worked for x amount of days.



Step 6:

In the **Miscellaneous** tab you can modify two different options that can help with covering shifts and modifying shifts on the day the rota is being modified.

