

Run Auto Roster

- Right click on the purple bar in the roster and select Auto Roster from the drop-down menu.

Allocate Optima 21 Apr 2025

Rostering SafeCare Personnel

All Requirements All Locations All Categories All Grade Types All Teams All Shift Types Any Day All Activity Types
 All Fulfillment Types All Local People Only Requests Filter People Too [Clear All](#)

Training Ward Person Search...

August 2025 September 2025

	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04	05	06	07	O/T Hrs	Net Hrs Left	Hours Left
Training Ward	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3				
RN-RN-RN	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2				
HCSW-HCSW-HCSW	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO				
SCN-SCN-Band 7 RN																															
Training Ward	11 August 2025																												-	-	2710:00
SCN																															
RN Bagging, Frodo (Band 7 RN)																															
RN																															
RN Gamgee, Samwise (Band 6 RN)																															
RN Grey, Gandalf (Band 6 RN)																															
RN Adan, Boromir (Band 5 RN)																															
RN Artanis, Galadriel (Band 5 RN)	ML1																														
RN Brandybuck, Merry (Band 5 RN)																															
RN Gloin, Gimli (Band 5 RN)																															
RN Gollum, Smeagol (Band 5 RN)																															
RN Gondor, Aragorn (Band 5 RN)																															
RN Greenleaf, Legolas (Band 5 RN)																															

Auto Roster
 Roster Analyser
 Retest Rules on Roster
 Staff Leagues
 Finalise
 Clear Roster
 Assignment Count
 Roster Notes
 Attendance Monitor

- Select the relevant Auto Roster step on the slide-in panel and click OK
- The standard order of Auto Roster steps is:
 1. Shared & Personal Patterns
 2. Nights Only
 3. Final Run

Auto Roster Training Ward : 11 August 2025

Select Auto Roster Build

 1. Shared & Personal Patterns ☒

 2. Nights Only ☐

 3. Final Run ☐

 4. Medics ☐

 5. Day Off Only ☐

☐ Log Trace

Cancel

OK

- The purple bar will turn orange to indicate the Auto Roster is running
- Double click on the orange bar to open the progress panel


21 Apr 2025

All Requirements
All Locations
All Categories
All Grade Types
All Teams

All Fulfilment Types
All Local People
Only Requests
Filter People Too

Training Ward
Person Search...

August 2025

Training Ward	11	12	13	14	15	16	17	18	19	20	21	22	23	24
RN-RN-RN	140	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3	LDx3
HCSW-HCSW-HCSW	84	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2	Nx2
SCN-SCN-Band 7 RN	20	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO
Training Ward	11 August 2025 (Auto Roster Requested)													
SCN														
RN														
RN Baggins, Frodo (Band 7 RN)														
RN Gamgee, Samwise (Band 6 RN)														
RN Grey, Gandalf (Band 6 RN)														
RN Adan, Boromir (Band 5 RN)														
RN Artanis, Galadriel (Band 5 RN)	ML1													
RN Brandybuck, Merry (Band 5 RN)														
RN Gloin, Gimli (Band 5 RN)														
RN Gollum, Smeagol (Band 5 RN)														
RN Gondor, Aragorn (Band 5 RN)														
RN Greenleaf, Legolas														

Roster

Training Ward
11 Aug - 7 Sep 2025

Auto Roster
Roster Analyser
More

Auto Roster Status: Completed
Unapproved
Will Open to Requests on c (10 days time)

Auto Roster Info
Refresh

Completed
Shared Patterns, took 00:00:03, processed 2 Pattern Assignments, created 26 assignments.
Personal Patterns, took 00:00:03, processed 3 Pattern Assignments, created 41 assignments.

Approval History

Status	Auth User	On
Name 11 August 2025		
Starts On 11/08/2025	Ends On 07/09/2025	
Notes No Notes Add Note		

- The progress panel will indicate how far along the process is
- Use the refresh button to update the progress report


21 Apr 2025

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Rostering

Saf

All Requirements

All Locations

All Categories

All Grade Types

All Teams

All Fulfilment Types

All Local People

Only Requests

Filter People Too

Clea

Training Ward

Person Search...

August 2025

Training Ward

11 12 13 14 15 16 17 18 19 20 21 22 23 24

RN-RN-RN

71

LDx2

LDx2

LD

LDx2

LDx2

LDx2

LDx3

LDx3

LD

LD

LDx2

LDx3

LDx3

HCSW-HCSW-HCSW

51

N

N

N

N

N

SCN-SCN-Band 7 RN

0

DO

DO

DO

DO

DO

DO

DO

DO

DO

DO

DO

DO

DO

Training Ward

11 August 2025 (Auto Roster Requested)

SCN

RN Baggins, Frodo (Band 7 RN)

SCN

SCN

SCN

SCN

SCN

SCN

SCN

SCN

SCN

SCN

RN

RN Gamgee, Samwise (Band 6 RN)

LD

LD

LD

LD

LD

LD

RN Grey, Gandalf (Band 6 RN)

LD

LD

LD

N

N

N

RN Adan, Boromir (Band 5 RN)

RN Artanis, Galadriel (Band 5 RN)

ML1

RN Brandybuck, Merry (Band 5 RN)

N

N

RN Gloin, Gimli (Band 5 RN)

N

N

RN Gollum, Smeagol (Band 5 RN)

RN Gondor, Aragorn (Band 5 RN)

LD

LD

LD

LD

RN Greenleaf, Legolas

N

N

N

N

N

N

Roster

Training Ward

11 Aug - 7 Sep 2025

Auto Roster

Roster Analyser

More

Auto Roster Status: Started

Unapproved

Will Open to Requests on c (10 days time)

Auto Roster Info

Refresh

Started

Global Patterns, 42% complete, processed 46 Duties, created 46 assignments.

Approval History

Status

Auth User

On

Name

11 August 2025

Starts On

11/08/2025

Ends On

07/09/2025

Notes

No Notes

Add Note

- Once the process is complete, close the slide-in panel using the X icon in the top right corner, then refresh the roster to display the inputted shifts

Allocate Optima 21 Apr 2025

Rostrering SafeCare Personnel

All Requirements All Locations All Categories All Grade Types All Teams All Shift Types Any Day All Activity Types

All Fulfillment Types All Local People Only Requests Filter People Too Clear All

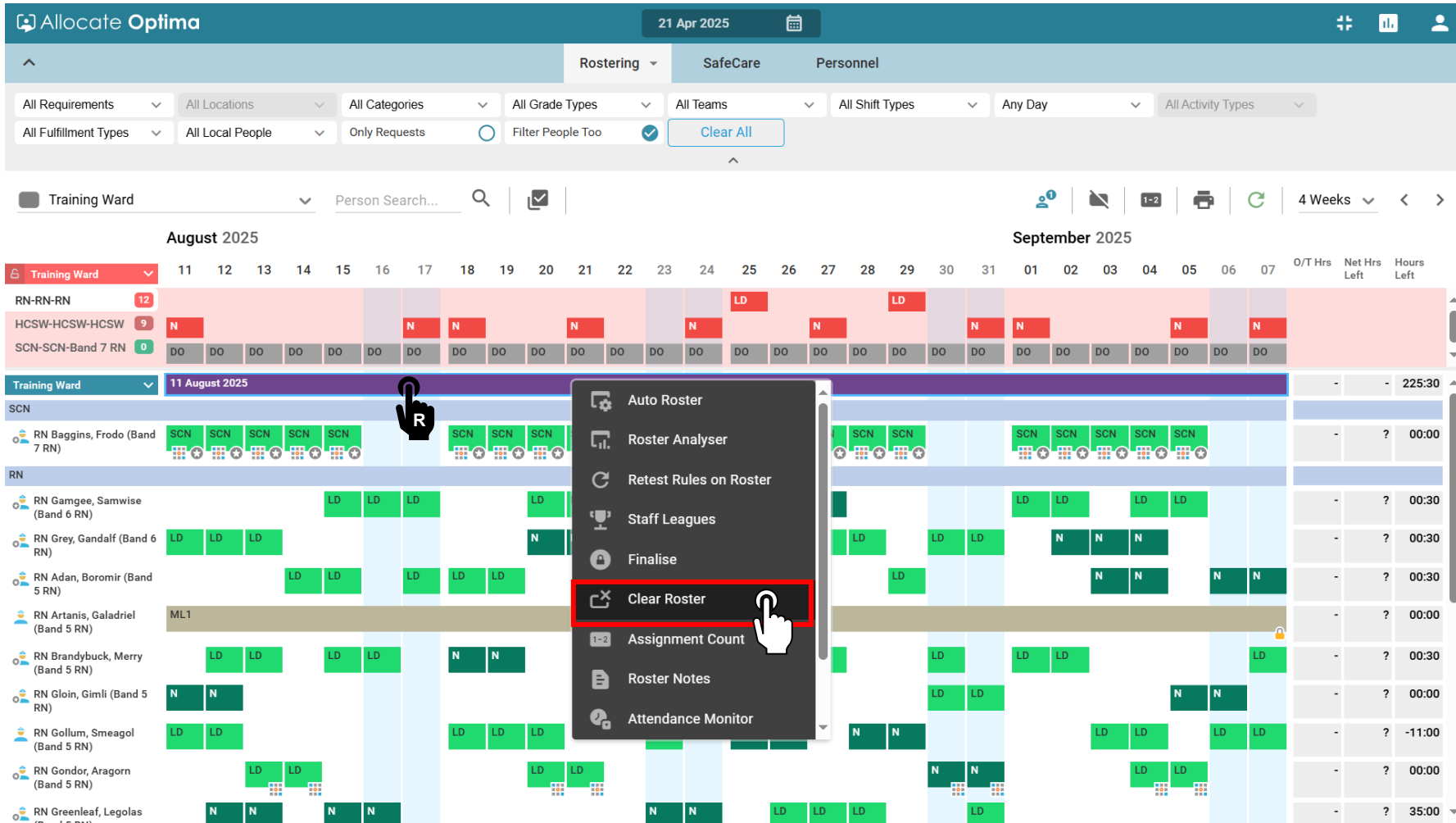
Training Ward Person Search...

4 Weeks

August 2025 September 2025

	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04	05	06	07	O/T Hrs	Net Hrs Left	Hours Left			
Training Ward	71	LDx2	LDx2	LD	LDx2	LDx2	LDx2	LDx2	LDx3	LDx3	LD	LD	LDx2	LDx3	LDx3	LDx3	LDx2	LDx3	LDx2	LDx2	LDx2	LDx2	LDx3	LD	LD	LDx3	LDx3							
HCSW-HCSW-HCSW	51	N					N	N			N			N			N				N	N			N		N							
SCN-SCN-Band 7 RN	0	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO	DO								
Training Ward	11 August 2025 (Auto Roster Requested)																															-	-	1387:00
SCN																																		
RN Baggins, Frodo (Band 7 RN)	SCN	SCN	SCN	SCN	SCN			SCN	SCN	SCN	SCN	SCN			SCN	SCN	SCN	SCN	SCN			SCN	SCN	SCN	SCN	SCN	-	?	00:00					
RN Gamgee, Samwise (Band 6 RN)					LD	LD	LD				LD	LD	LD			N	N	N				LD	LD		LD	LD	-	?	00:30					
RN Grey, Gandalf (Band 6 RN)	LD	LD	LD						N	N	N						LD	LD		LD	LD		N	N	N		-	?	00:30					
RN Adan, Boromir (Band 5 RN)																							N	N		N	N	-	?	104:00				
RN Artanis, Galadriel (Band 5 RN)	ML1																															-	?	00:00
RN Brandybuck, Merry (Band 5 RN)								N	N																		-	?	127:00					
RN Gloin, Gimli (Band 5 RN)	N	N																						N	N		-	?	46:00					
RN Gollum, Smeagol (Band 5 RN)															N	N		N	N								-	?	104:00					
RN Gondor, Aragorn (Band 5 RN)				LD	LD						LD	LD								N	N			LD	LD		-	?	00:00					
RN Greenleaf 1 enolae	N	N				N	N						N	N													-	?	81:00					

- Repeat these steps for all 3 Auto Roster stages. Manual adjustments can be made to the rostered shifts between each step or at the end of the full process
- If you need to clear the roster of auto-rostered shifts, right click on the purple bar and select Clear Roster to remove all shifts



The screenshot shows the Allocate Optima interface for the Training Ward. The top navigation bar includes tabs for Rostering, SafeCare, and Personnel. Below this are various filters for requirements, locations, categories, grade types, teams, shift types, and activity types. A 'Clear All' button is visible. The main area displays a roster for August and September 2025. A purple bar represents the auto-rostered shifts. A context menu is open over this bar, with the 'Clear Roster' option highlighted in red. Other options in the menu include Auto Roster, Roster Analyser, Retest Rules on Roster, Staff Leagues, Finalise, Assignment Count, Roster Notes, and Attendance Monitor. The roster grid shows shifts for various staff members, including RN Baggins, Frodo (Band 7 RN), RN Gamgee, Samwise (Band 6 RN), RN Grey, Gandalf (Band 6 RN), RN Adan, Boromir (Band 5 RN), RN Artanis, Galadriel (Band 5 RN), RN Brandybuck, Merry (Band 5 RN), RN Gloin, Gimli (Band 5 RN), RN Gollum, Smeagol (Band 5 RN), RN Gondor, Aragorn (Band 5 RN), and RN Greenleaf, Legolas (Band 5 RN). The grid shows shifts for August 11-31 and September 1-7, with columns for O/T Hrs, Net Hrs Left, and Hours Left.

- Select the relevant date range and any type of shift you **do not** wish to remove, then click OK

Clear Roster

Starts On

11/08/2025

Ends On

07/09/2025

☐

Keep Requested Duties

☐

Keep Manually Assigned Duties

☒

Keep Personal Pattern Assigned Items (41)

☒

Keep Shared Pattern Assigned Items (26)

☐

Keep Demand Pattern Assigned Items

☐

Keep Duties with Clock Events

Will clear 156 assigned duties and 0 unavailabilities

☐

Enable Shift Type Filter

Shift Type Filter

Cancel

OK