

1 Template facility setup

HosPortal setup checklist

HP: HosPortal
C: Customer

Detailed Checklist						
Item	Action	Location on HosPortal	Owner	Status	Target Date	Comments
A	Kick off and review		HP	Not started		
	Add new site in 'pre-live' state	HP admin page > Add a new site	HP	Not started		
	Determine key personnel		HP	Not started		
	Set up site administrators and invite them to log on	Admin page > Site administrators	HP	Not started		
	Set target dates		HP	Not started		
	Review and discuss existing roster spreadsheets		HP/C	Not started		
	Review and discuss existing roles on spreadsheets		HP/C	Not started		
	Review and discuss existing teams and skills		HP/C	Not started		
	Share kick-off checklist	Setup Checklist	HP	Not started		
	Share HP glossary	HP glossary	HP	Not started		
	Share customer SMS IS form		HP	Not started		
	Provide an overview of next milestone		HP	Not started		
	Agree next meeting		HP/C	Not started		
B	Create roster structures					
	Define roster groups and overall structure	Admin page > Roster groups	C	Not started		
	Define week names and standard session times for each roster group	Admin page > Roster groups	C	Not started		
	Create roles	Admin page > Roles	C	Not started		
	Create roster structures		C	Not started		
	For ABR type: view rosters in Edit mode to confirm structure, correct times and days, PHs, and staffing	Roster page > Edit	C	Not started		
	For LBR type: create shift templates and view rosters in Template mode to confirm structure	Roster page > Templates	C	Not started		
	Determine if there is a shortname pattern	Admin > short name settings	C	Not started		
	Load staff using updated list showing skills and teams and any start dates	Staff page > Import	C	Not started		
	Q&A		HP/C	Not started		
	Discuss next milestone		HP	Not started		
	Agree next meeting		HP/C	Not started		
C	Define rules and patterns					
	Create shift conflict rules	Admin > Shift conflict rules	C	Not started		
	Create work rules	Admin > Shift work rules	C	Not started		
	Create user conflict rules	Admin > User conflict rules	C	Not started		
	Create leave rules	Admin > Leave request rules	C	Not started		
	Determine if patterns are to be used	Admin > Patterns	C	Not started		
	If #31 is yes, build patterns	Admin > Patterns	C	Not started		
	Q&A		HP/C	Not started		
	Discuss next milestone		HP	Not started		
	Agree next meeting		HP/C	Not started		
D	Create user templates					
	Build users templates	Staff page > [person] > User templates; or Roster Page > Templates > Shift > 'person' icon > choose user	C	Not started		
	If relevant, add 'unallocated' templates	Staff page > [person] > User templates	C	Not started		
	If relevant, add 'unavailable' templates	Staff page > [person] > User templates	C	Not started		
	Determine if terms are to be used			Not started		
	If #39 is yes, define terms; term dates and term users	Admin page > Terms	C	Not started		
	Q&A		HP/C	Not started		
	Discuss next milestone		HP	Not started		
	Agree next meeting		HP/C	Not started		
E	Prepare for roster					
	Create leave types	Admin > Leave types	C	Not started		
	Upload leave	Leave > Import	C	Not started		
	Review leave imported accurately	Leave page	C	Not started		
	If required, update user skills and teams	Admin page > Teams; Admin page > Skills	C	Not started		
	If required, set permissions	Admin page > Permissions	C	Not started		
	Q&A		HP/C	Not started		
	Discuss next milestone		HP	Not started		
	Agree next meeting		HP/C	Not started		
F	Build rosters					
	<i>Different ways to build your rosters:</i>					
	For ABR type: From Edit page and assign users on the shifts; or	Roster page > Edit > Shift > Assign user through 'person' icon > Draft or Publish	C	Not started		
	For ABR type: From Edit page using the multi-select function; or	Roster page > Edit > Actions > Multi Select > Bulk user > Draft or Publish	C	Not started		
	Build rosters from patterns; or	Roster page > Edit > Roster > Burger menu (3 dots) > Create shifts from pattern	C	Not started		

	Build rosters from templates either as draft (in yellow) or published (in white)	Roster page > Templates > Draft or Publish	C	Not started
	Set up launch help 'splash page'	(On Intercom)	HP	Not started
	Q&A		HP/C	Not started
	Discuss next milestone		HP	Not started
	Agree next meeting		HP/C	Not started
G	Go Live			
	Confirm go-live communication to users	(Site internal communication)	C	Not started
	Final checks		C	Not started
	Set site live	Admin > Site details > Go live	C	Not started
	Q&A		HP/C	Not started
	Discuss next milestone		HP	Not started
	Agree next meeting		HP/C	Not started
H	Others			Not started
	Define different views			
	Set shift reminders	Admin page > Reminders	C/HP	Not started
	Set rules for swaps and gifts; cross-swaps; time adjustments	Admin page > Shift change request rules	C/HP	Not started
	Set market rules	Admin page > Shift market rules	C/HP	Not started
	Define leave request rules (using and approving leave)	Admin page > Leave request rules	C/HP	Not started
	Q&A		HP/C	Not started