RotaCloud

RotaCloud for Employees

Using RotaCloud on your desktop computer

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Getting started

Introduction

RotaCloud is your employer's choice of software for managing your shifts and your team's rota. The RotaCloud site and companion app are your way of viewing your shifts wherever you are.

Your employer will invite you to join RotaCloud by adding your email address to your employee profile. You'll be sent an email allowing you to confirm your account and get it set up.

Please follow the link in your welcome email to confirm your RotaCloud account, and add your login details.

If you can't find the email, be sure to check your spam folder first. If you still can't find it, check with your employer that they've entered your email address correctly, and ask them to re-send the invitation.

Now you are all set up, you can log in to RotaCloud by going to
https://app.rotacloud.com/login

Dashboard

Your Dashboard contains a monthly overview of all your shifts. You can navigate between months via the date selector at the top of the page.

Rotas page

The Rotas page shows your shifts at any Location that you've been assigned to. If you're assigned to more than one Location, the Location name in the top-left corner will have a drop-down menu that you can use to navigate between rotas.

There's also a date selector to the right of this menu which you can use to navigate between weeks, or click on the date text itself to open a calendar and jump further ahead. On the rota itself, staff names are listed down the left-hand side, with your name appearing at the top.

Shifts contain a start and end time, and can contain a role defining what your job/ task is for that shift. Each role has a corresponding colour.

If there are any notes added to your shift, you'll see a speech bubble icon. You can hover over this Shift Note with your cursor to see what the note says. Notes can also be added to the day for all employees. You'll find these Day Notes at the top of each day, next to its date.

At the top of the page, you'll see a Tools menu. Here you can print a weekly rota for the location that you're assigned to. You can also export a calendar feed of your shifts to any calendar software, such as Google Calendar.

Open shifts

At the very top of the rota, you'll see a row of shifts known as Open Shifts (if your account manager has enabled this feature). These are shifts that have not been assigned to anyone.

You can claim these for yourself on a first come, first served basis by clicking on the shift and hitting 'Claim Shift'.

Once claimed, the shift will be assigned to you on the rota automatically, so make sure you can definitely work the Open Shift before claiming it!

Please note: if clicking an Open Shift doesn't work, your manager may have disabled this feature, or you might not be able to work the role that has been assigned to this shift.

Notifications

Email notifications are sent to you whenever you have a new shift added, a shift gets updated, or an Open Shift is available. Similarly, you'll also be notified if any requests or holiday arrangements (more on this below) are approved or denied.

You can also receive a reminder when your shift is starting, and can choose how far in advance you receive this reminder.

RotaCloud also has an in-app notification system. You can access it by clicking the bell icon in the top-right of RotaCloud. This icon will display the number of notifications you have in a red circle if there are any that still need to be read. In-app notifications include colleagues asking you to cover their shifts, and the approval/ denial of your leave requests, so it's a good idea to keep an eye on them.

If your employer has enabled SMS notifications on their RotaCloud account, you'll also be able to receive text message alerts when there are any changes or updates.

You can change when and how you receive notifications whenever you like — check out the 'Settings' section below to find out more.

You can find out more about text notifications by using our online help guides at **help.rotacloud.com**
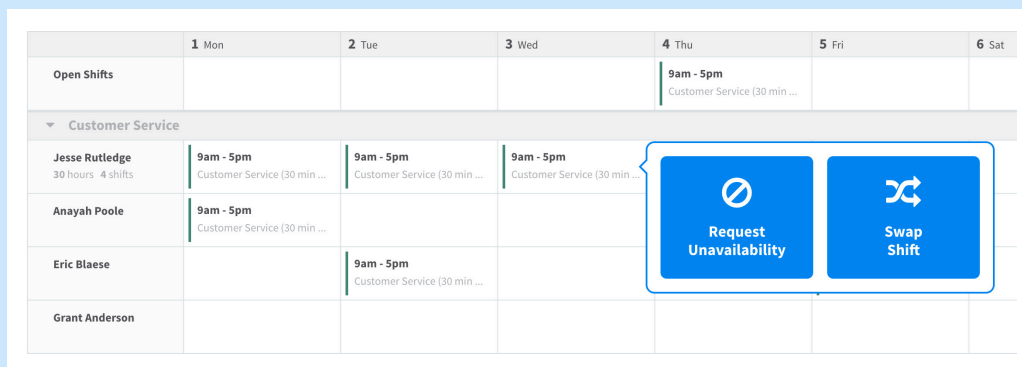
Requests

Please note: the following are optional features that your manager may choose to disable.

By clicking on a shift on the rota, you'll see a pop-up menu with the option to request unavailability or a shift swap.

Unavailability

This tool lets you to message your employer/managers to tell them you can't work a particular shift. They are then notified, and can approve or deny the request. If approved, the shift will be removed from your rota. If denied, you will not be able to request it off again.
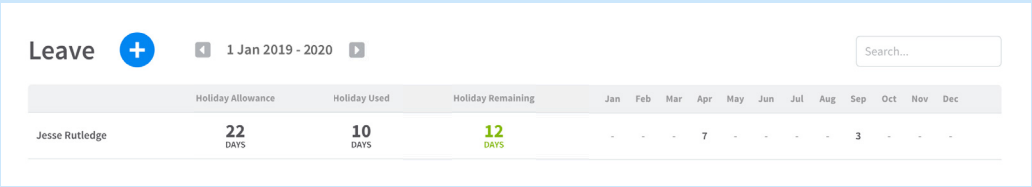
Shift swap

This tool lets you arrange cover with another employee through RotaCloud. Select the shift that you can't work, click 'Swap Shift' and choose the employee who you'd like to cover for you. Optionally, you can offer to work a shift for them in return.

The request is then forwarded to that employee, who can approve or deny it. If the employee agrees, then the request is forwarded to your employer/managers for approval. If approved, the shifts are moved automatically. If denied at any stage, the shifts stay where they are.

Leave / Holiday

The Leave page gives you a breakdown of any holiday that you have booked. If your employer has configured it, your allowances will detail how much holiday you have remaining. You can (if enabled) request leave by clicking the blue plus button.

When requesting leave, choose the type of leave that best describes your absence. You can choose from 'Holiday' or 'Other Leave'. Only holiday will come out of your holiday allowance. Choose a start date and end date, and use the AM/PM drop-down menus to denote a half-day. Next, you can add a message for your employer/managers if you wish, then hit 'Continue'. Your manager can then approve or deny the request.

If your holiday request exceeds the amount of holiday you have remaining for the year, you may receive the message: "You have not got enough holiday remaining in the leave year to request this holiday."

Request Leave

Back to Leave

Type

Holiday ▼

Start Date

	am ▼

End Date

	pm ▼

Days

Message

Request Leave or **Cancel**

When Holiday has been added to the rota, it displays in a hashed blue box.
When Other Leave has been added, it displays in a hashed green box.

Availability

Availability lets you mark down when you're free or not free to work, so your employer knows if you can work a shift ahead of building the rota.

From the Availability page, you can mark down when you can or cannot work on particular days or for particular time frames. You can create as many patterns as you like, and can choose how often this pattern recurs. You can choose to have a pattern recur every week, every other week, and so on. You can then decide whether the pattern is ongoing, or if it ends on a specific date, or example, if you're on a training course or have university or college term dates.
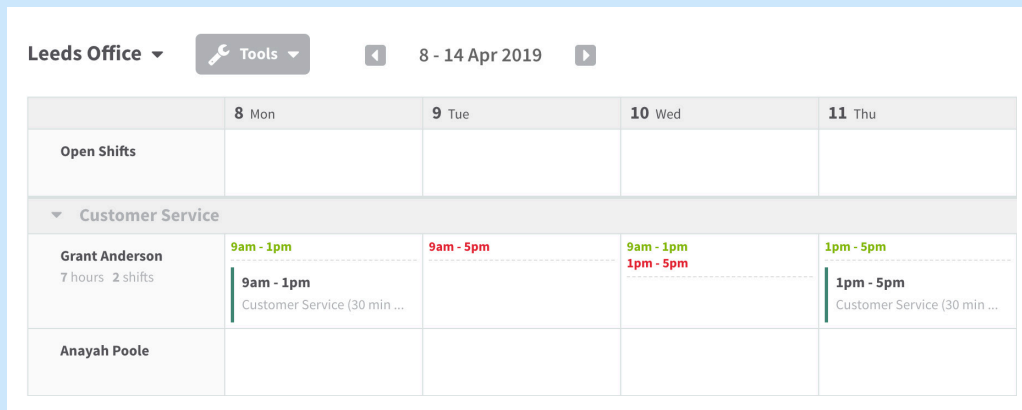
Each pattern you create is then fed into the rota. You can see how it displays by heading to the Tools menu, and selecting 'Show or Hide Availability' (only available on the desktop version).

Timesheets

The Timesheets screen allows you to view your clocking-in and clocking-out times for an entire pay period, and compare them to your scheduled shift times. Your daily totals for hours paid are shown on the right, with a grand total for the pay period shown at the bottom of the screen.

You can switch between the current, previous, and next pay period by using the date selector in the top-left of the page. The 'Hide Shifts' icon can be used to show just your actual clocking-in times.

3 Mar - 2 Apr 2019 ▾

Your Timesheet

🗓 Hide Shifts

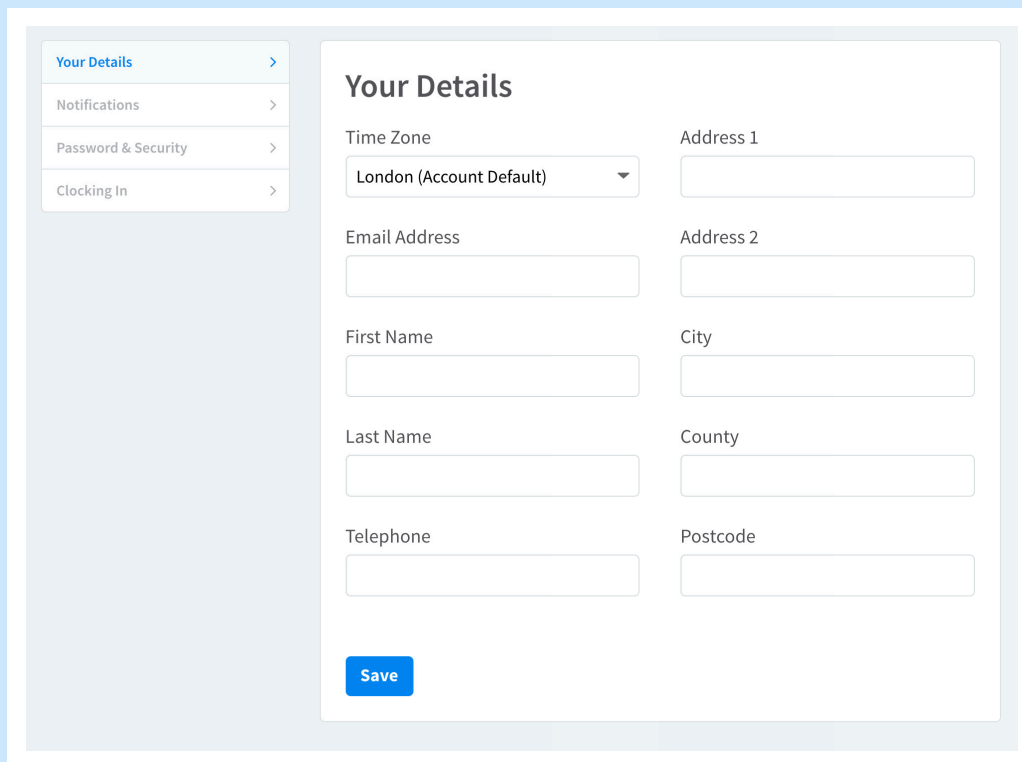| Date	In	Out	Break	Details		Hours Paid
Wednesday 20 March	09:00	17:30	30	Customer Service	📍 Leeds Office	8.50
	09:00	17:30	30	Customer Service	📍 Leeds Office	
Thursday 21 March						
Friday 22 March						
Saturday 23 March	09:00	17:30	30	Customer Service	📍 Leeds Office	8.50
	09:00	17:30	30	Customer Service	📍 Leeds Office	
Sunday 24 March	09:00	17:30	30	Customer Service	📍 Leeds Office	8.50
	09:00	17:30	30	Customer Service	📍 Leeds Office	
Monday 25 March	09:00	17:30	30	Customer Service	📍 Leeds Office	8.50
	09:00	17:30	30	Customer Service	📍 Leeds Office	

Updating details & settings

You can view and change your personal details (including your email address and password) by going to the Account Settings page (the cog icon in the top right corner of the blue bar).

Also in the Settings menu, you can control the types of notifications that you receive from RotaCloud. To select whether or not you receive an email, push or SMS notifications, simply check or uncheck the boxes next to that notification type.

Use the "Send Me Reminders" box to choose if you want to receive reminders of your shifts starting, and how far before the shift you receive them.
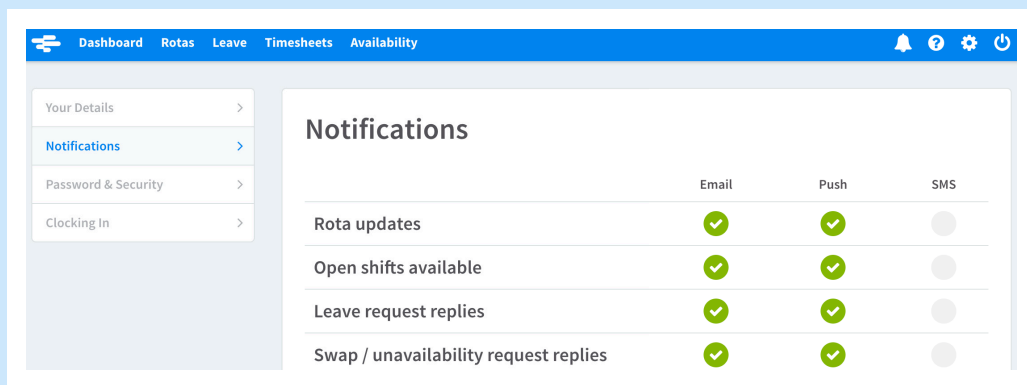
The Password & Security page allows you to change your password from within RotaCloud. Or, if you've forgotten your password, you can reset it via a link sent to your email address. Two-factor authentication can also be enabled, which requires you to enter a code sent to your mobile phone for additional security.

Your current RotaCloud sessions are also displayed below, allowing you to see exactly where you have logged into RotaCloud.

Dashboard   Rotas   Leave   Timesheets   Availability

Your Details
Notifications
Password & Security
Clocking In

Change Password

Current Password

I forgot my password

New Password

Passwords must be at least 8 characters in length

Re-type Password

Save

Two Factor Authentication

Enable Two Factor Authentication

Current Sessions

Device	Last Active	
Chrome on Macintosh	7 minutes ago	✖
Chrome on Macintosh	14 minutes ago	✖

Finally, if you use an iPad/tablet terminal to clock in at your place of work, you can view or change your clocking-in PIN from the Clocking In screen.

Dashboard   Rotas   Leave   Timesheets   Availability

Your Details
Notifications
Password & Security
Clocking In

Clocking In

Clocking In PIN

Show PIN

Save

Troubleshooting

If you're experiencing issues with the RotaCloud website, please check that you're running the latest available version of your operating system and web browser.

If you are unable to find a particular feature that this manual has made reference to, it could have been disabled by your manager/employer. We recommend consulting them if you'd like to make use of a particular RotaCloud feature.

Finally, if you're still having issues, our live chat service is available Monday–Friday, 8am–5pm GMT, and can be accessed through the chat icon in the lower-right corner of the RotaCloud website.

We also have an online Help Centre available 24/7 at **help.rotacloud.com.** It's packed full of useful articles and videos offering advice and answers from the RotaCloud team.

Get your
shifts together™