

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.

The screenshot displays a web application interface for an employee dashboard. At the top, a blue navigation bar contains the following tabs: Dashboard, Rotas, Leave, Timesheets, and Availability. On the right side of this bar are icons for notifications, help, settings, and a power button. Below the navigation bar, the main content area is titled 'April 2019' with a date selector showing '1' and a right arrow. The dashboard is organized into a grid of 20 cells, each representing a day of the month. Each cell contains a date, a day of the week, and a shift block. The shift block is a dark green rectangle with the text 'Leeds Office', '9am - 5pm', and 'Customer Service'. The days of the week are: 1 Mon, 2 Tue, 3 Wed, 4 Thu, 5 Fri, 8, 9, 10, 11, 12, 15, 16, 17, 18, 19, 22, 23, 24, 25, 26, 29, 30, 1, 2, 3. The shift blocks are present for all days except for the 4th, 11th, 18th, 25th, and the 1st, 2nd, and 3rd of the following month (which are shown in a lighter grey color).

1 Mon	2 Tue	3 Wed	4 Thu	5 Fri
Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service		Leeds Office 9am - 5pm Customer Service
8	9	10	11	12
Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service		Leeds Office 9am - 5pm Customer Service
15	16	17	18	19
Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service		Leeds Office 9am - 5pm Customer Service
22	23	24	25	26
Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service		Leeds Office 9am - 5pm Customer Service
29	30	1	2	3
Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service	Leeds Office 9am - 5pm Customer Service		Leeds Office 9am - 5pm Customer Service

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.

	1 Mon	2 Tue	3 Wed	4 Thu	5 Fri	6 Sat	7 Sun
Open Shifts							
Customer Service							
Jesse Rutledge 30 hours 4 shifts	9am - 5pm Customer Service (3...)	9am - 5pm Customer Service (3...)	9am - 5pm Customer Service (3...)		9am - 5pm Customer Service (3...)		
Anayah Poole	9am - 5pm Customer Service (3...)			9am - 5pm Customer Service (3...)			
Eric Blaese		9am - 5pm Customer Service (3...)			9am - 5pm Customer Service (3...)		
Grant Anderson							
Manager							
James Denham	9am - 5pm Manager (30 min br...)		9am - 5pm Manager (30 min br...)		9am - 5pm Manager (30 min br...)		
Korey Santiago							
Lawson Dolan		9am - 5pm Manager (30 min br...)		9am - 5pm Manager (30 min br...)			

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.

	1 Mon	2 Tue	3 Wed	4 Thu	5 Fri	6 Sat	7 Sun
Open Shifts				9am - 5pm Customer Service (30 mi...)			
Customer Service							
Jesse Rutledge 30 hours - 4 shifts	9am - 5pm Customer Service (30 mi...)	9am - 5pm Customer Service (30 mi...)	9am - 5pm Customer Service (30 mi...)				
Anayah Poole	9am - 5pm Customer Service (30 mi...)			9am - 5pm Customer Service (30 mi...)			
Eric Blaese		9am - 5pm Customer Service (30 mi...)			9am - 5pm Customer Service (30 mi...)		
Grant Anderson							
Manager							
James Denham	9am - 5pm Manager (30 min break)		9am - 5pm Manager (30 min break)		9am - 5pm Manager (30 min break)		
Korey Santiago							
Lawson Dolan		9am - 5pm Manager (30 min break)		9am - 5pm Manager (30 min break)			

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**

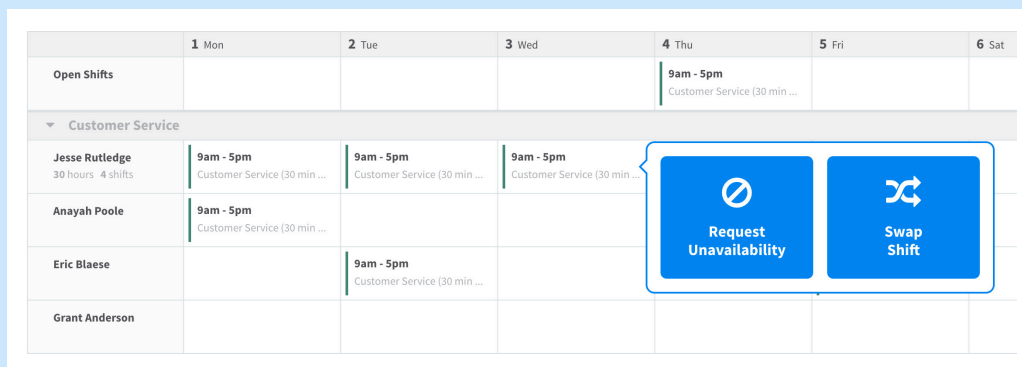
Requests

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.



	1 Mon	2 Tue	3 Wed	4 Thu	5 Fri	6 Sat
Open Shifts				9am - 5pm Customer Service (30 min ...)		
▼ Customer Service						
Jesse Rutledge 30 hours 4 shifts	9am - 5pm Customer Service (30 min ...)	9am - 5pm Customer Service (30 min ...)	9am - 5pm Customer Service (30 min ...)			
Anayah Poole	9am - 5pm Customer Service (30 min ...)					
Eric Blaese		9am - 5pm Customer Service (30 min ...)				
Grant Anderson						

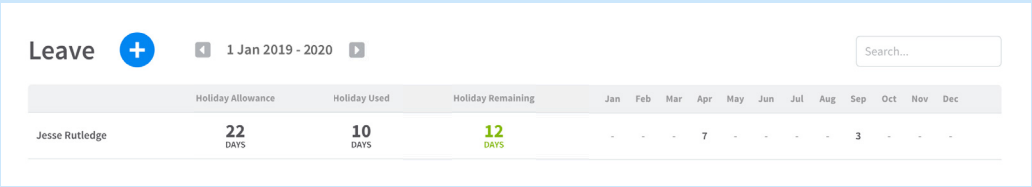
Shift swap

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.



The screenshot shows a web interface for managing leave. At the top, there's a 'Leave' header with a blue plus button and a date range '1 Jan 2019 - 2020'. Below this is a table with columns for 'Holiday Allowance', 'Holiday Used', 'Holiday Remaining', and a monthly breakdown from Jan to Dec. The data is for 'Jesse Rutledge'.

	Holiday Allowance	Holiday Used	Holiday Remaining	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Jesse Rutledge	22 DAYS	10 DAYS	12 DAYS	-	-	-	7	-	-	-	-	3	-	-	-

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.

Leeds Office ▼ Tools ▼ 1 - 7 Apr 2019 London

	1 Mon	2 Tue	3 Wed	4 Thu	5 Fri	6 Sat	7 Sun
Open Shifts				9am - 5pm Customer Service (30 min ...)			
Customer Service							
Grant Anderson							
Anayah Poole	9am - 5pm Customer Service (30 min ...)			9am - 5pm Customer Service (30 min ...)			
Eric Blaese		9am - 5pm Customer Service (30 min ...)			9am - 5pm Customer Service (30 min ...)		
Leeds Outdoors	9am - 5pm	9am - 5pm	9am - 5pm		9am - 5pm		

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.

Add Availability Pattern

[Back to Availability](#)

Title

Effective Dates

Start Date

End Date

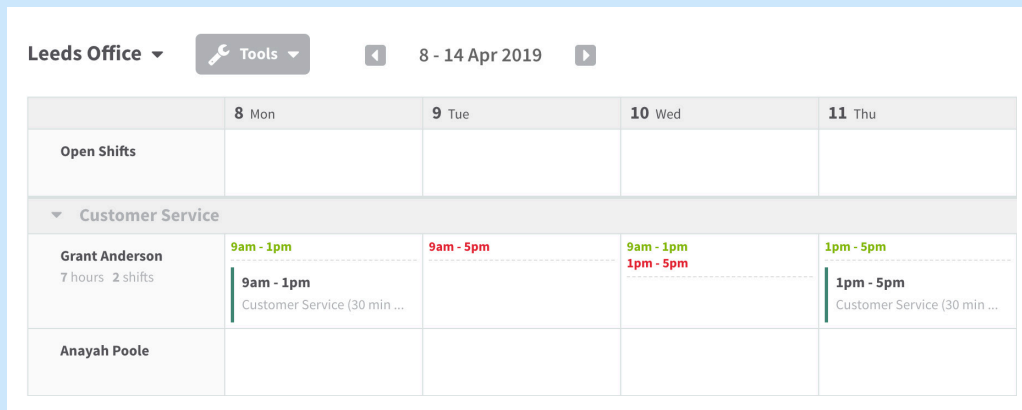
Repeat Every

or

Mon	Tue	Wed	Thu	Fri	Sat	Sun
9am - 4pm	10:30am - 1:30pm 2:30pm - 6pm	1pm - 6pm	9am - 6pm	9am - 6pm	9am - 6pm	9am - 6pm

Employees' Guide - Availability

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).




The screenshot displays a web interface for the 'Leeds Office' rota. At the top, there is a header with 'Leeds Office' and a dropdown arrow, a 'Tools' button with a wrench icon and a dropdown arrow, and a date range '8 - 14 Apr 2019' with left and right navigation arrows. Below the header is a table with columns for dates: '8 Mon', '9 Tue', '10 Wed', and '11 Thu'. The table has three main sections: 'Open Shifts', 'Customer Service' (indicated by a dropdown arrow), and individual employee rows. The 'Open Shifts' row is empty. The 'Customer Service' section shows shifts for 'Grant Anderson' and 'Anayah Poole'. Grant Anderson's shifts are: 9am - 1pm on Mon, 9am - 5pm on Tue, 9am - 1pm and 1pm - 5pm on Wed, and 1pm - 5pm on Thu. Anayah Poole's shifts are: 9am - 1pm on Mon, 9am - 5pm on Tue, 9am - 1pm and 1pm - 5pm on Wed, and 1pm - 5pm on Thu. Each shift entry includes a vertical bar icon and the text 'Customer Service (30 min ...)'. The interface is set against a light blue background.

	8 Mon	9 Tue	10 Wed	11 Thu
Open Shifts				
▼ Customer Service				
Grant Anderson 7 hours 2 shifts	9am - 1pm 9am - 1pm Customer Service (30 min ...)	9am - 5pm	9am - 1pm 1pm - 5pm	1pm - 5pm 1pm - 5pm Customer Service (30 min ...)
Anayah Poole				


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 ▼ 

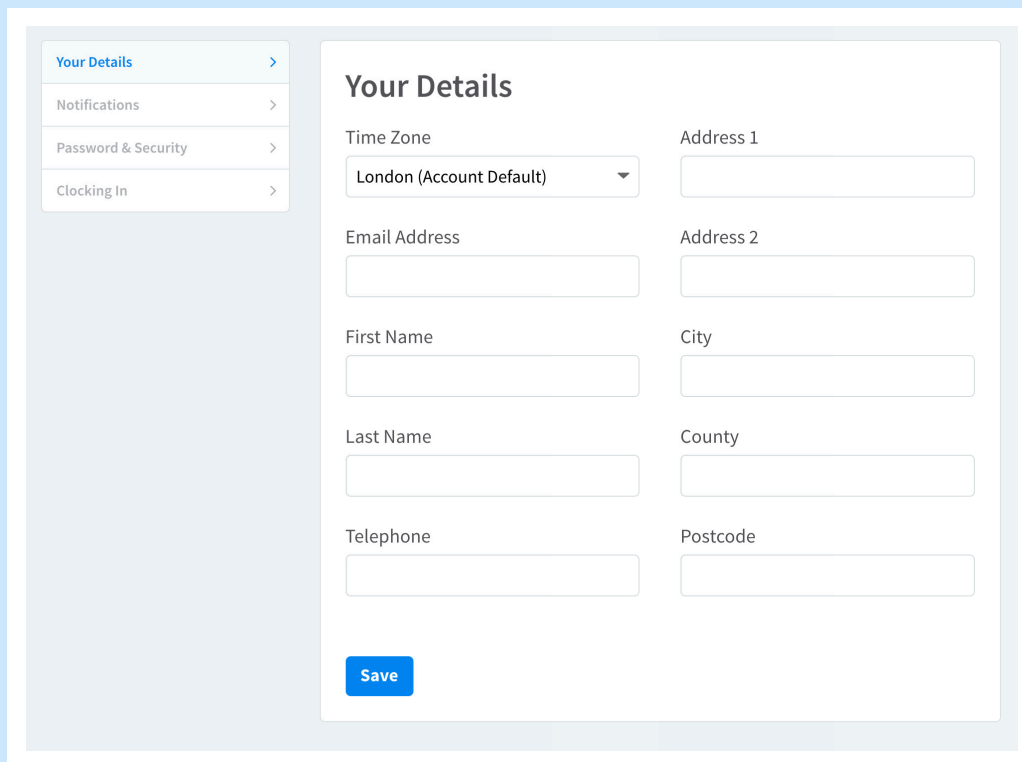
Your Timesheet

 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).

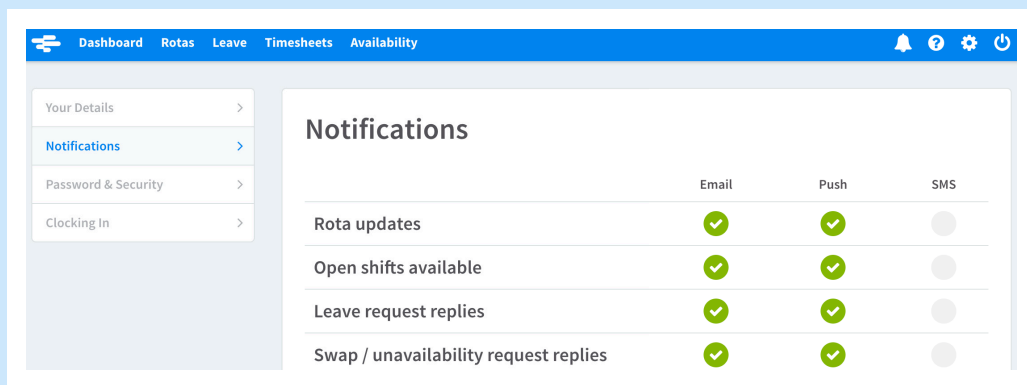


The screenshot shows a web interface for updating personal details. On the left is a sidebar with four menu items: 'Your Details' (highlighted in blue with a right-pointing arrow), 'Notifications' (with a right-pointing arrow), 'Password & Security' (with a right-pointing arrow), and 'Clocking In' (with a right-pointing arrow). The main content area is titled 'Your Details' and contains several input fields arranged in two columns. The left column includes a 'Time Zone' dropdown menu currently set to 'London (Account Default)', followed by text input fields for 'Email Address', 'First Name', 'Last Name', and 'Telephone'. The right column includes text input fields for 'Address 1', 'Address 2', 'City', 'County', and 'Postcode'. At the bottom left of the main content area is a blue 'Save' button.

Employees' Guide - Updating details & settings

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.

Employees' Guide - Updating details & settings

The screenshot shows a web application interface with a blue header bar containing navigation links: Dashboard, Rotas, Leave, Timesheets, and Availability. On the right side of the header are icons for notifications, help, settings, and a power button. A left sidebar contains a menu with 'Your Details', 'Notifications', 'Password & Security' (highlighted), and 'Clocking In'. The main content area is divided into three sections. The first section, 'Change Password', includes fields for 'Current Password', 'New Password', and 'Re-type Password', with a 'Save' button and a link for 'I forgot my password'. The second section, 'Two Factor Authentication', features an 'Enable Two Factor Authentication' button. The third section, 'Current Sessions', displays a table of active 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.

The screenshot shows the 'Clocking In' settings page within the same application. The header and sidebar are identical to the previous screenshot. The 'Clocking In' menu item in the sidebar is highlighted. The main content area has a title 'Clocking In' and a 'Clocking In PIN' field. Below the field is a 'Show PIN' link and a 'Save' button.

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™

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