RotaCloud

RotaCloud for Managers

Using RotaCloud on your desktop computer

Contents

Account types & permissions

As an Admin, you have control over your entire RotaCloud account, and can set up your Locations along with the permissions (access level) for each of your Managers.

An Employee has only basic access to the system (mostly information that relates only to themselves). Managers, meanwhile, have only as much access as the Admin decides.

As a Manager, your account is the step between an Employee and an Admin. Your permissions are based on the Location(s) you manage. You can appear on as many rotas as your Admin allows. However, as a Manager, you will also manage at least one Location. You don't need to be assigned to a Location to manage it; this just means all employees assigned to that Location will be your responsibility.

Only Admins can:

- View and edit RotaCloud billing information
- Change account settings
- Enable paid add-on packages

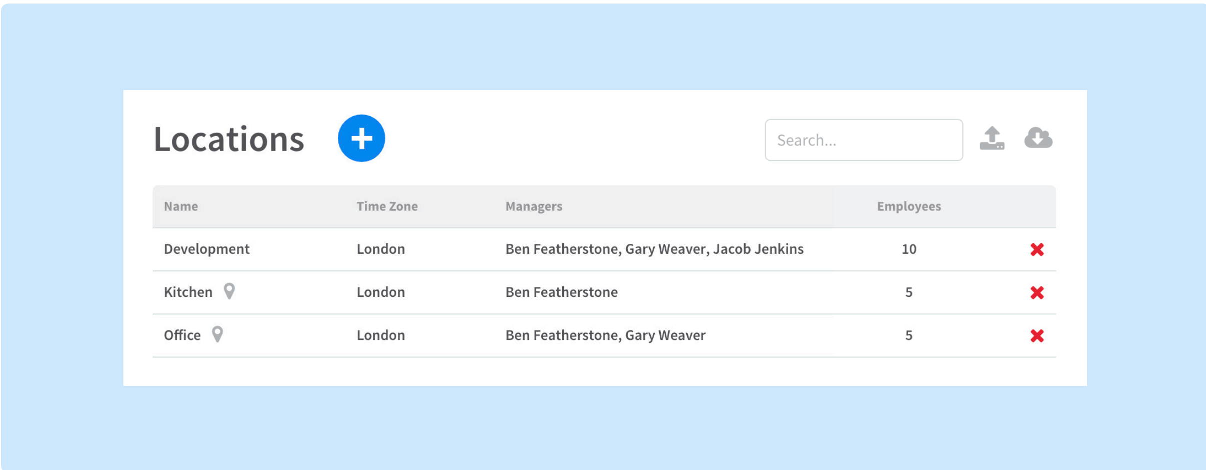
Permissions you can be granted by your Admin include:

- Create and edit rotas for locations you manage
- Approve or deny shift swaps and unavailability
- Approve or deny leave requests
- Manually add leave to yourself
- Manage leave embargoes
- Add employees and manage basic employee information
- View and edit employee salary information
- Manage roles
- View reports

The following sections will go into detail about how to use your RotaCloud account. Don't forget that, if you're an Admin, all these sections apply to you, but the sections Managers have access to will depend on your permissions.

Setting up Locations

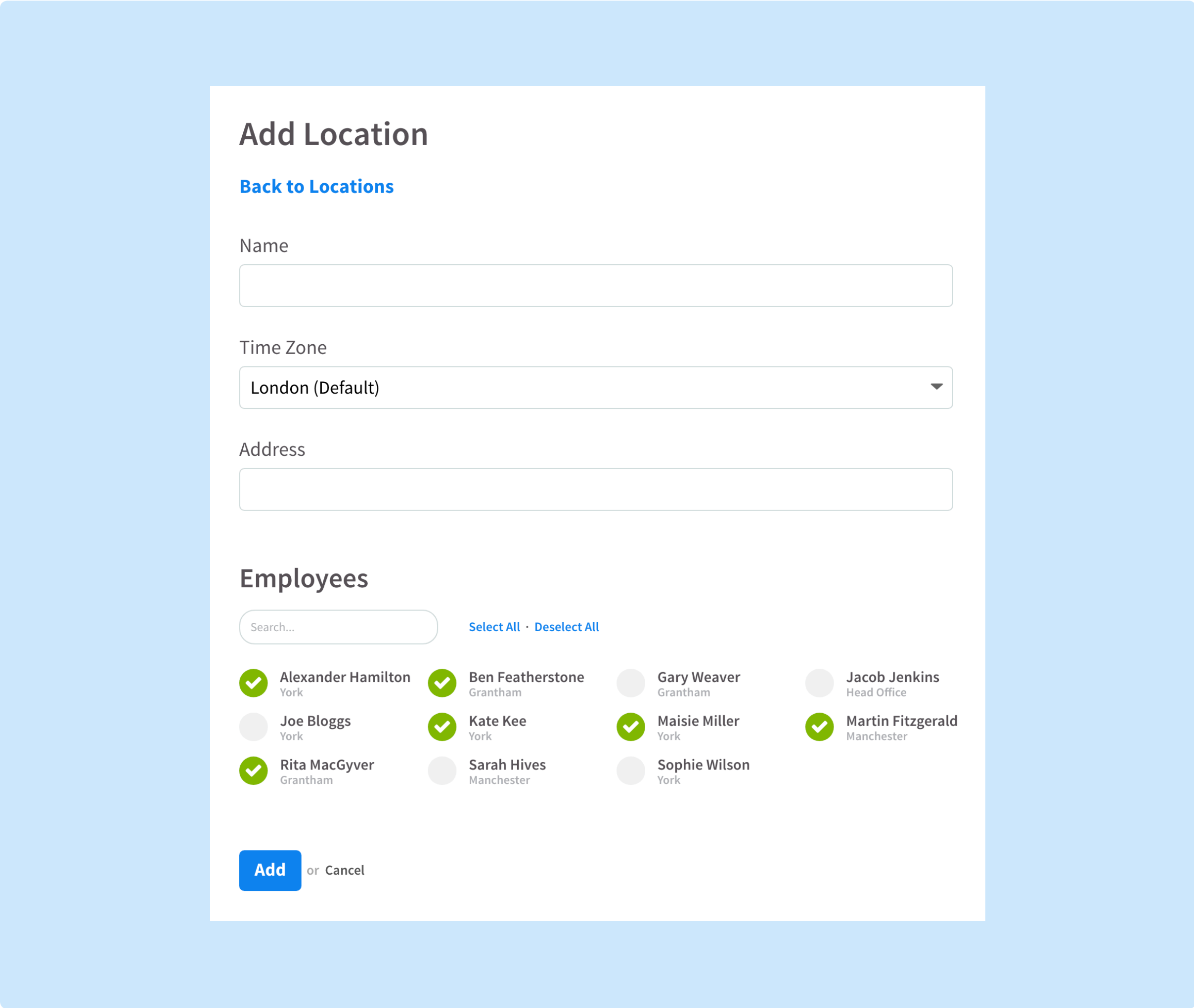
In RotaCloud, each Location is essentially a different rota. This doesn't need to be a different physical location, but allows you to split up your account. Employees can be assigned to as many different Locations/rotas as you need. **To access this section, go to Company > Locations.**



Your Locations page shows you a list of your Locations, their time zones, who manages them and how many users are assigned to them. You can delete a Location by clicking on the red 'X' next to its name.

To create a new Location, click the blue plus button. You'll then be able to give the Location a name, address, and time zone, and select the employees you want to assign to it. If you don't yet have employees added to your account, you can come back to this later, or assign the locations in the employee accounts once set up.

For information about setting up Locations relating to clocking in/out, please see our Time & Attendance section.



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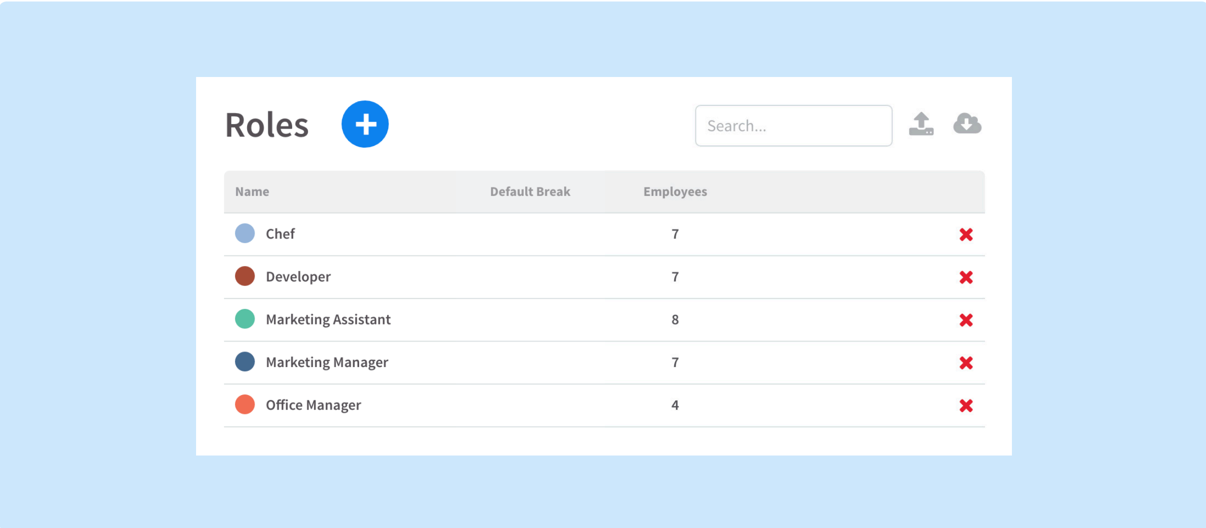
Creating & assigning Roles

Roles are a way of assigning job titles or tasks to your Employees. They are colour coded to make your Dashboard and Rotas easier to view at a glance, and can be accessed by going to Company > Roles.



Roles help to define and restrict what an employee can do in the account. Employees can only be assigned and claim shifts for Roles they work. The Roles page will show you a list of all your roles and how many employees are assigned to work it.

As on the Employees page, you can use the search bar to help find a specific role, import roles if you have a lot to upload at once, or download role data in a spreadsheet format. To delete a role, click the red 'X' on the corresponding Role.

To edit one of these Roles, simply select the Role, make the changes you need and click 'Save'.

To create a new Role, click the blue plus button. You will then be asked to give it a name, default break (we generally would not recommend adding this if the role often has shifts of varying length), select a colour, and add employees to work this role.

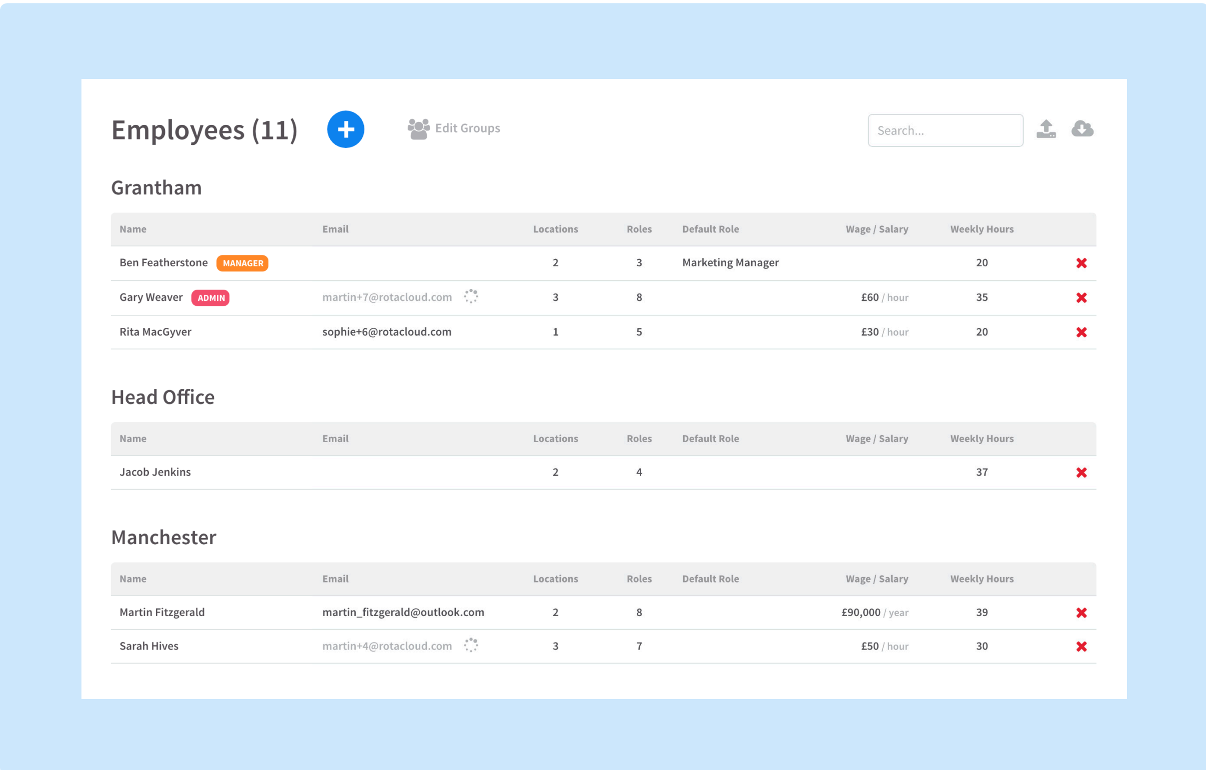
Managing Employees

Introduction

RotaCloud can be used to store important and useful information about your employees. You can add, view, and edit this by going to Company > Employees.

The Employees Page

On the Employees page you will find a list of all the employees you have on your account. You will be able to see at a glance who is a Manager, Admin, or Employee. There's also a search bar to help you quickly find someone in your employee list.



If you have groups set up, you will see them on your Employees page. These can be anything you like and don't have to correspond with any Roles or Locations. (See below to learn how to create Groups.)

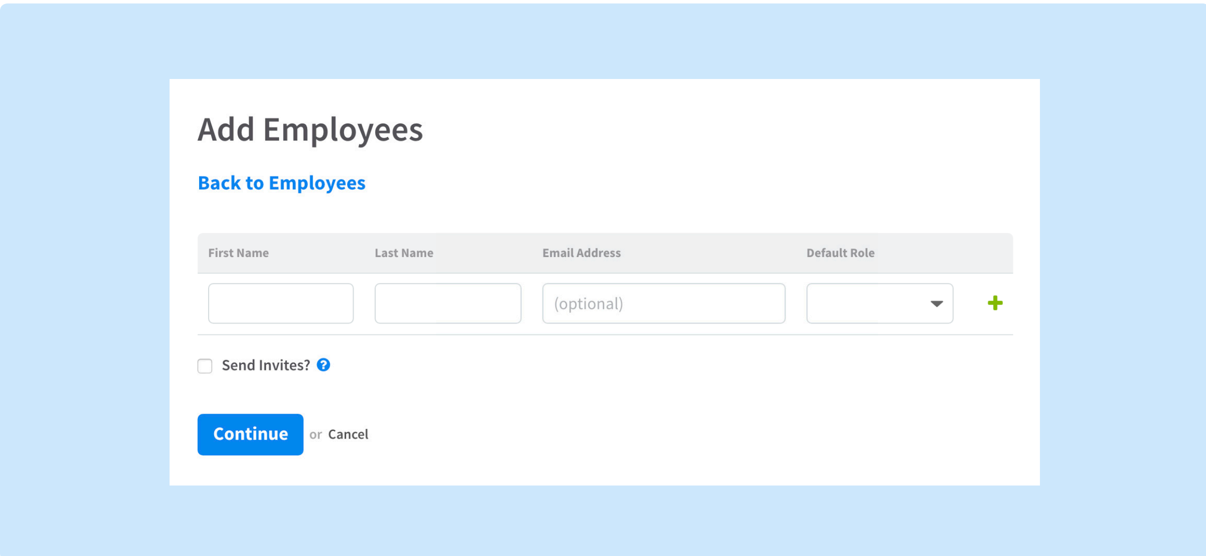
The numbers in the Locations and Roles columns can be hovered over with your cursor for details of what they are assigned to.

If you need to delete an employee, click the red 'X' at the end of their name. This will remove them from your account from that point onwards (including future shifts) but you'll still have a record of their past shift, leave and timesheet information (if applicable).

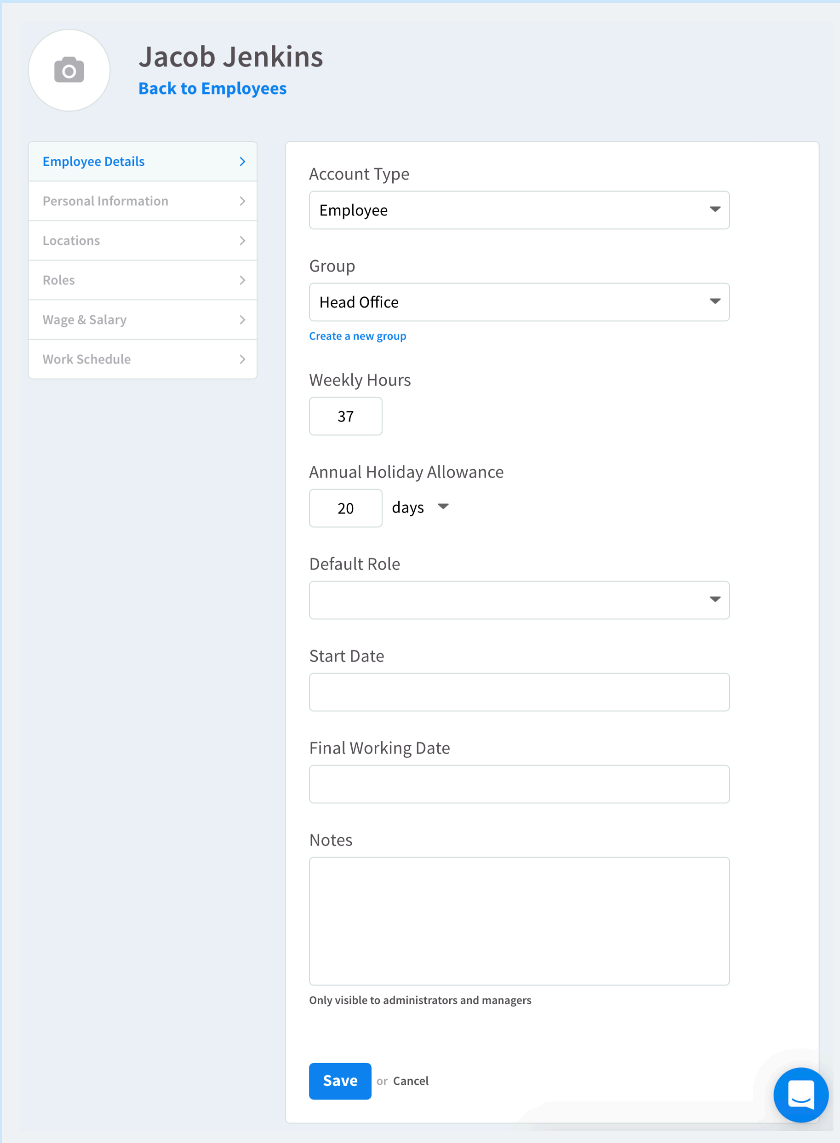
You can add a new employee by clicking the blue plus button at the top of the page. You'll then be prompted to set up their account.

Adding and editing employee profiles

Once you have gone to Company > Employees and clicked the blue plus button, you will be shown a page asking you to enter their First Name, Last Name, Email Address and Default Role. You can then choose to send their email invite.



Sending an invite means the user will receive an email from RotaCloud asking them to set up their account. Once they've done this, they can log in and start using the system and download the smartphone app.



After you click 'Continue', you'll see the Employee Profile page. This is where you can add in all the user's information and set their account to either Admin, Manager or Employee.

Employee Details is where you set basic employee information such as Weekly Hours, Leave Allowance and Account Type.

Personal Information is where you can add an email address, phone number and date of birth. Adding a date of birth means the employee's birthday will be marked on the rota with a pink cake icon.

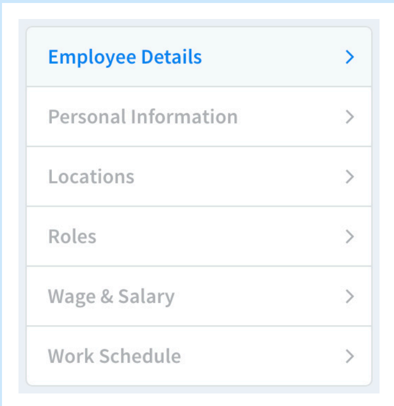
Locations allows you to assign your employee to the rotas they need to appear on.

Roles is where you can add the employees to the Roles you need them to work or claim.

Wage & Salary is where you can enter an employee's rates of pay. These can be hourly rates, shift rates or an annual salary. You can enter different rates for the different Roles they're assigned to, and rates for different leave types.

To upload a profile pic, click on the camera icon next to the employee's name. They can also add this themselves through the mobile app.

Once you're happy with the information you've entered, just click the 'Save' button and you'll be taken back to the Employees page.



Changing an employee's email address

Once an employee has followed their email invite and set up their account, you will not be able to change their email address.

A user can change their own email address by logging into their account and going to their Settings. Once they have entered their new email address, they will receive an email (to the new address) asking them to confirm the change. Once they have confirmed it, the email address will be changed and they can log in using this.

A user does not need access to their old email address to change the email registered to their account, so don't worry if this is the case.

Importing and exporting employee information

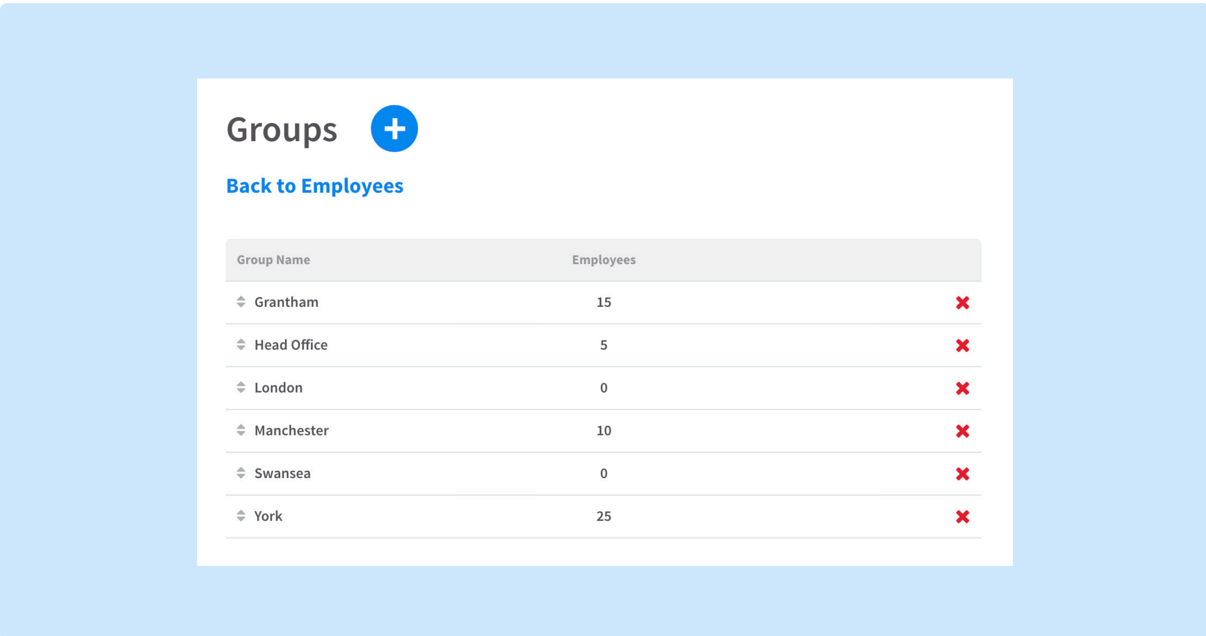
You can download all your employee information to a spreadsheet by going to Company > Employees and clicking the downwards arrow in the top right corner.

To save time when adding a large number of employees, you can then use the downloaded spreadsheet as a template and add in additional users. You can then upload them by clicking the upwards arrow in the top right. Don't forget that the file you're importing will need to be in CSV format.

Setting up Groups

Groups are used to separate your Employees page to make it easier for you to view — you can also choose to view your Rotas page this way. Unlike Roles or Locations, groups will not affect what the user can claim or view, and just relates to the layout of the page.

To view, edit and create Groups, go to Company > Employees > Edit Groups. Here, you'll see a list of all your Groups and can drag and drop them into your preferred order. If you don't have any Groups set up yet, you can do this by clicking the blue plus button where you'll be prompted to add a group 'Name'. Employees can then be added to this Group in the Employee Details section of their profile.



Creating & editing rotas

Getting started

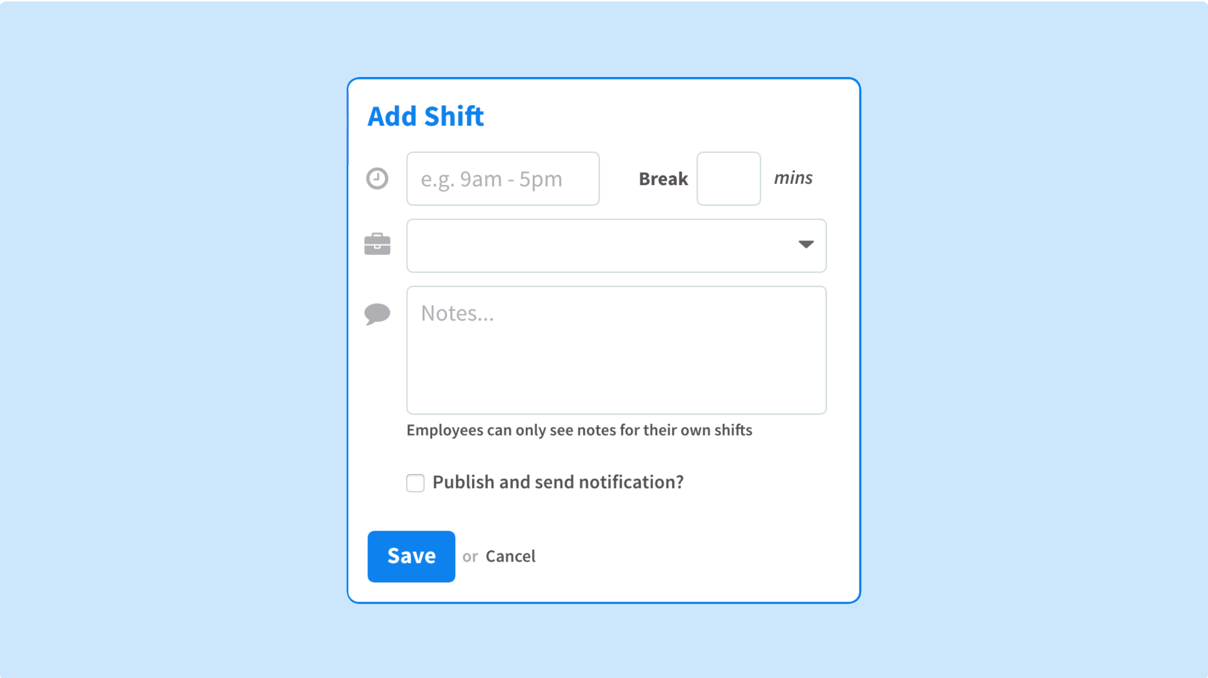
The Rotas page is where you can create and edit your shifts in RotaCloud. You can find the rota builder section by clicking 'Rotas' in the navigation bar.

Shifts are entered into the grid that takes up the majority of the screen. This is a table showing one calendar week. The columns are individual days, and the rows display your employees.

Adding your first shift

To add a new shift, simply click the cell in the table corresponding to the day and employee you want to schedule in, and a pop-up box will appear.

Here, you can type the start and end times for the shift. You can add the times in various formats. Here are a few quick examples:



- 9am - 5:30pm
- 9:00 - 17:30
- 0900 - 1730
- 9am - 1730

After some time, RotaCloud will learn about your most common shift times, and provide them in a dropdown menu as suggestions to help speed up the process.

The next step is to choose a break length. This is optional, but you should enter it if you don't pay your staff for their breaks.

You then need to choose a Role from the dropdown list. These are set up in a different section of RotaCloud but are usually a task or job type.

Clicking inside the Role box will show the Roles assigned to the employee. If you can't find a Role in this box, it's likely that the employee isn't assigned to work that Role. If there are no Roles available in the dropdown, the employee won't be assigned to work any (you can add a shift without a role, but we recommended that you add one).

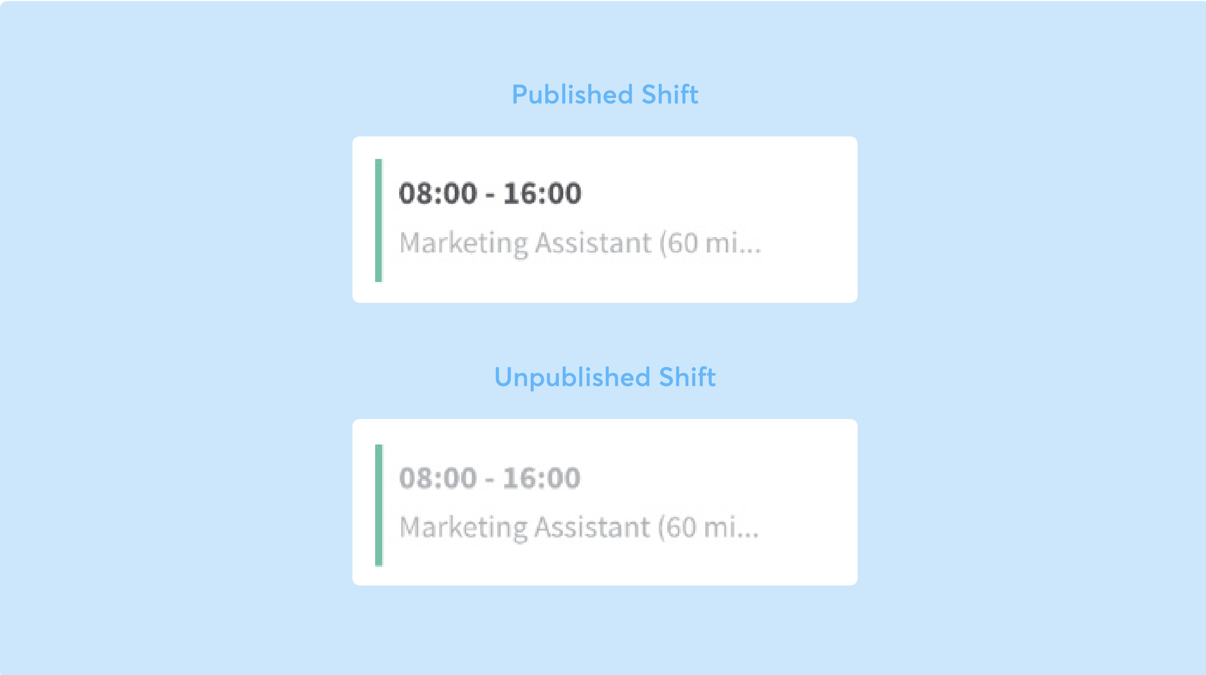
If the Role has a default break, it will automatically be entered into the Break field (unless you've manually entered a break already).

Next, you can enter Notes for the shift. Who these notes are visible to is dependent on the settings defined by your RotaCloud Admin, but by default they're only visible to yourself, the employee the shift is assigned to, other Managers who manage that employee, and Admins.

Finally, you can choose whether you'd like to instantly publish the shift. This means a notification will be sent out to the employee making them aware of the rota update, and allow them to view the shift when they log in.

An unpublished shift is not yet visible to any of the employees on the account, so you can leave shifts unpublished to plan and change your rota.

Finally, you can press 'Save' to add the shift to the rota. It will appear in black text if it's published and grey if it's unpublished:



Moving shifts

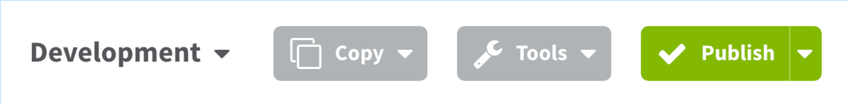
To move a shift to different day, different employee, or both, simply click on the shift and drag it into the required cell.

Publishing

Once you're happy with your rota and want your employees to be able to view their shifts, it's time to publish. Before publishing, only Admins and Managers of the Location will be able to see the shifts — not users with employee access.

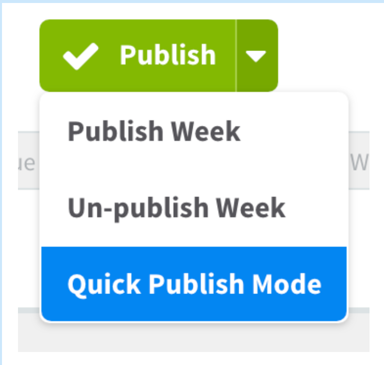
Shifts can be published in two ways:

You can either publish an entire week at once by clicking the green 'Publish' button at the top of your Rotas page ...



… Or you can click the downwards arrow and select 'Quick Publish Mode'. This tool will allow you to publish and unpublish shifts by clicking on them. You can also publish an entire day by clicking the date at the top of the rota, or publish a specific employee's shifts for the week by clicking on their name. To exit this tool, click 'Back to Rota Builder'.

You can also use this drop-down list to unpublish the entire week.



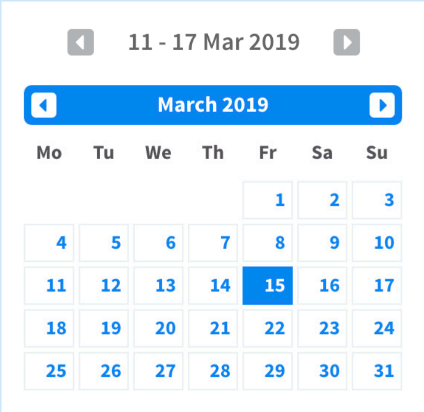
Moving between weeks

There are three ways you can move to a different week on the Rotas page:

1. Use the left and right arrow keys on your keyboard to move to the previous and next week.

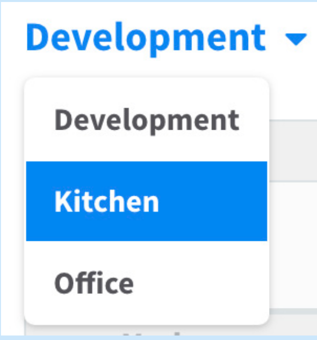
2. Click the arrows next to the current date.

3. Click the current date and select a new date using the mini calendar.



Switching to a different Location

If you manage more than one Location or you have permission to view Locations you don't manage, you can view and/or edit this Location by choosing it from the Locations menu in the top-left.



Holiday types and colours

When leave is entered into the system, it is also shown on the Rotas page. Different colours correspond to different types of leave.

A grey box indicates a Scheduled Day Off/Non-Working Day

A light-blue box indicates a Holiday

A green box indicates Other Leave

An amber box indicates Sickness

A pink box indicates Maternity/Paternity Leave

A dark blue box indicates a Public Holiday

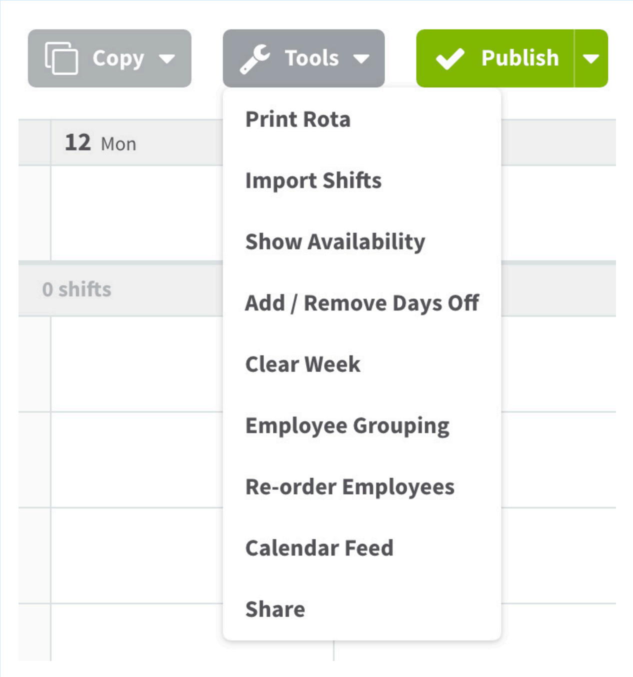
An orange box indicates Authorised Absence

A red box indicates Unauthorised Absence

Advanced rota building

Tools menu

The below options are available in the Tools menu on the Rotas page.



Print Rota lets you to print a paper copy of the rota, or export it as a PDF document.

Import Shifts allows you to import your shifts from a spreadsheet format. If you'd like the template for this, get in touch with one of the RotaCloud team via the live chat window on our website and we'll help you out.

Hide/Show Availability is used to view or hide your employees' availability patterns. These will show in red for unavailable and green for available (you're still able to add shifts over these, but they act as a guide for you).

Add/Remove Days Off lets you to set employees' scheduled non-working days. These appear as grey on the rota and are not taken from Holiday Allowances. Click in a cell to add this, or click again to remove. When you're done, click 'Back to Rota Builder' at the top of your page.

Clear Week will delete all shifts from the week, but won't delete Leave or Days Off. Please be aware shifts are not retrievable once deleted.

Employee Grouping allows you to group employees on the rota by Default Role or the Groups set in the Employees section.

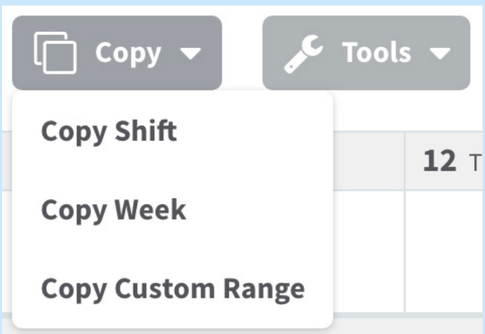
Re-order Employees allows you to drag and drop employees into any order you like. This takes effect across the whole system, not per Location (Admin only).

Calendar Feed will allow you to create a link that can be used to sync RotaCloud with a calendar service such as Google Calendar or Apple/iCloud Calendar.

Share generates a link to the rota which can be sent to a third party who doesn't have a RotaCloud account. This will update as you make changes to your rota and will not be editable.

Copying shifts

The below options are available in the Tools menu on the Rotas page.



To copy just one shift, press and hold the shift key on your keyboard, then click and drag the shift you want to copy into a new cell. These shifts can be copied across to different days and/or employees.

Or, if you click on the 'Copy' drop-down button at the top of the page, you can choose the 'Copy Week' tool. Clicking this will copy all of the shifts from the current week. You can then click forward using the date navigator at the top of your rota and select the week you want to paste this on to. When you're ready, click 'Paste', and all shifts will be copied.

Please be aware that, if the week you paste onto isn't blank, any shifts that clash will not be copied.

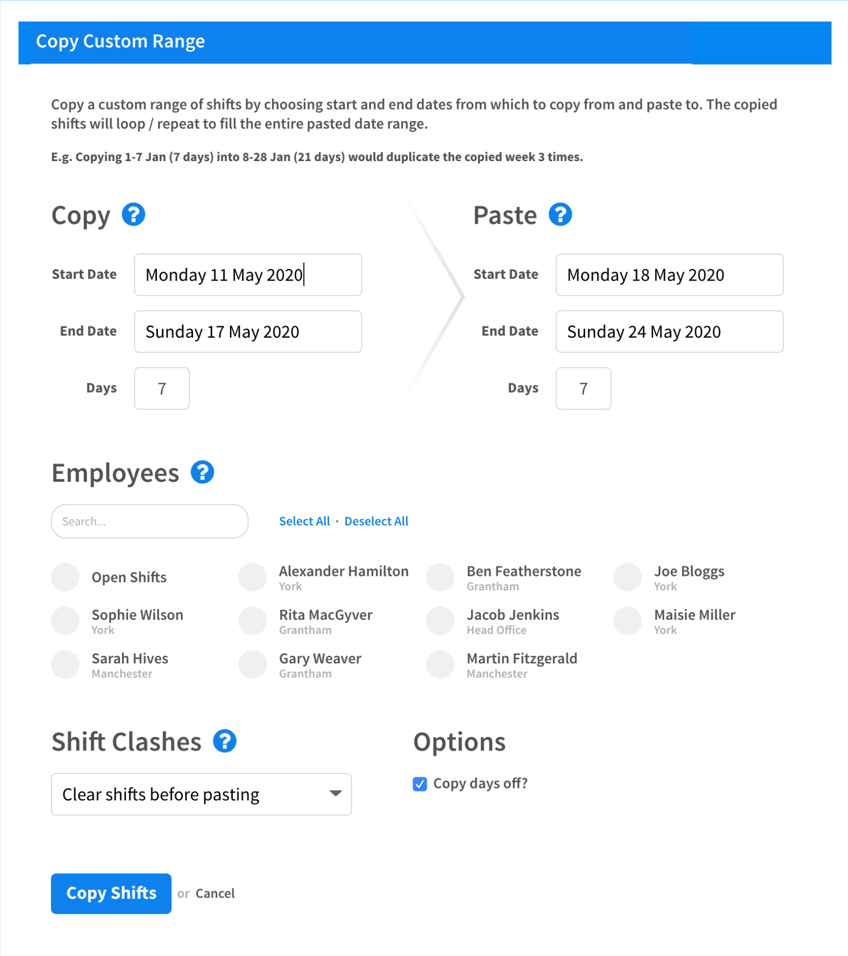
Finally, there's the 'Copy Custom Range' tool. This is useful for copying big chunks of your rota over long periods that apply to either certain employees or all employees, and can be accessed by clicking Copy > Copy Custom Range on your Rotas page.

It works by selecting a copy date range and then a paste date range.

The days in the copy range will be added repeatedly back to back between your paste start and end dates.

With this tool, you can choose to only copy shifts for certain employees, and select what you'd like to do with clashing shifts using the drop-down options at the bottom of the window.

Don't forget: if you want to include non-working days in the copy range you'll need to tick the 'Copy Day off' box.


Copy Custom Range
Copy a custom range of shifts by choosing start and end dates from which to copy from and paste to. The copied shifts will loop / repeat to fill the entire pasted date range.
E.g. Copying 1-7 Jan (7 days) into 8-28 Jan (21 days) would duplicate the copied week 3 times.
Copy
Start Date
Monday 11 May 2020
End Date
Sunday 17 May 2020
Days
7
Paste
Start Date
Monday 18 May 2020
End Date
Sunday 24 May 2020
Days
7
Employees
Search...
Select All · Deselect All
Open Shifts
Alexander Hamilton York
Ben Featherstone Grantham
Joe Bloggs York
Sophie Wilson York
Rita MacGyver Grantham
Jacob Jenkins Head Office
Maisie Miller York
Sarah Hives Manchester
Gary Weaver Grantham
Martin Fitzgerald Manchester
Shift Clashes
Clear shifts before pasting
Options
Copy days off?
Copy Shifts
or Cancel

Using the Dashboard

Getting started

The Dashboard is a useful way of seeing your rota information at a glance and spotting any coverage gaps you may have. It can be found by clicking 'Dashboard' in the navigation bar.

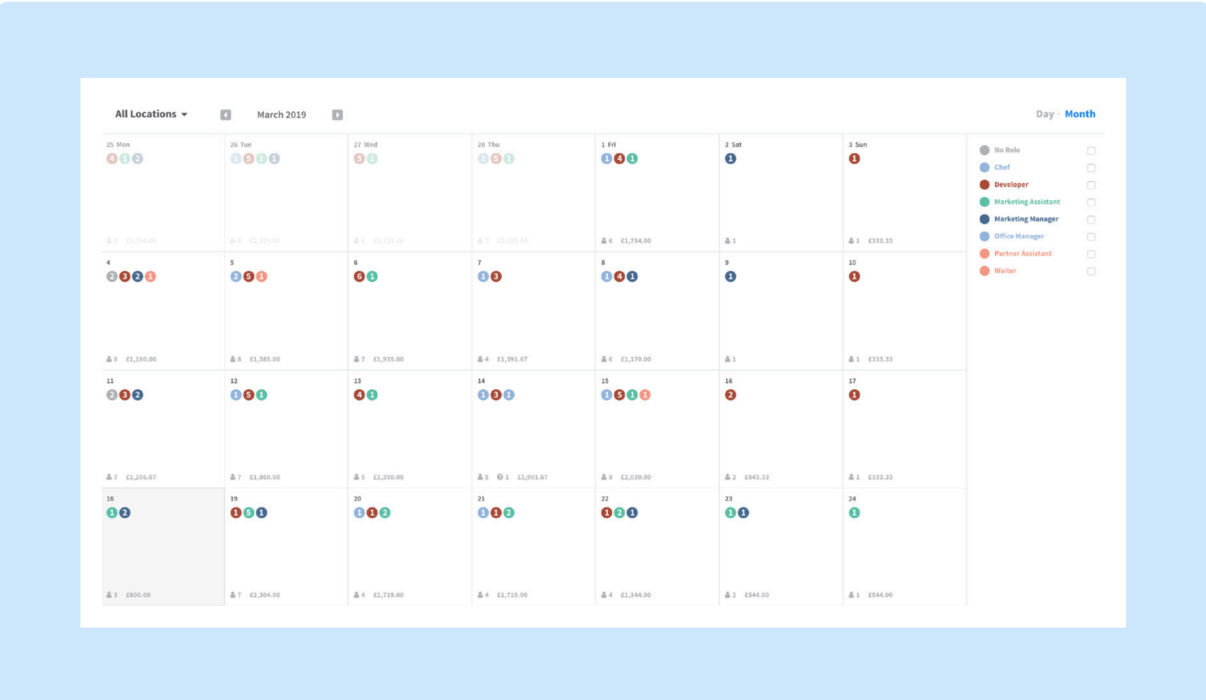
You can view the Dashboard either as a month or in the day view.

Month view

This view will show you a full month in a calendar-style grid format.

Each day has a number in a coloured circle. The number shows how many employees are working that role on that day, and the colour corresponds to the role.

There's a key on the right of the sceen which shows the role each colour represents.



You can hover over the coloured circle(s) to see which employees are working, and what their hours are.

Day view

The Day view can be accessed in two ways: either by clicking on a particular day in the Month view, or by clicking 'Day' in the top right corner of Month View.

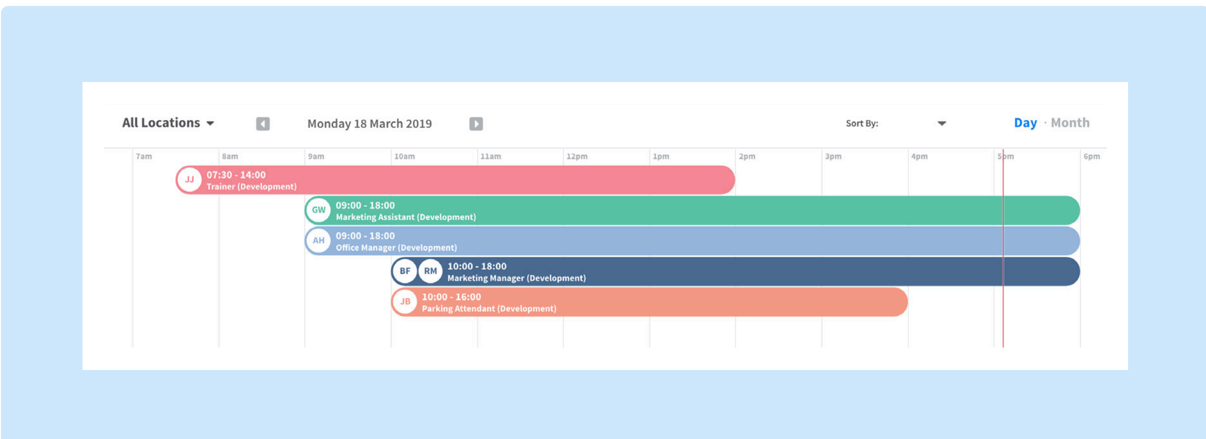
The Day view shows the shifts in a timeline view over the course of your working day.

The red line shows the current time to help you see how many employees you have working currently.

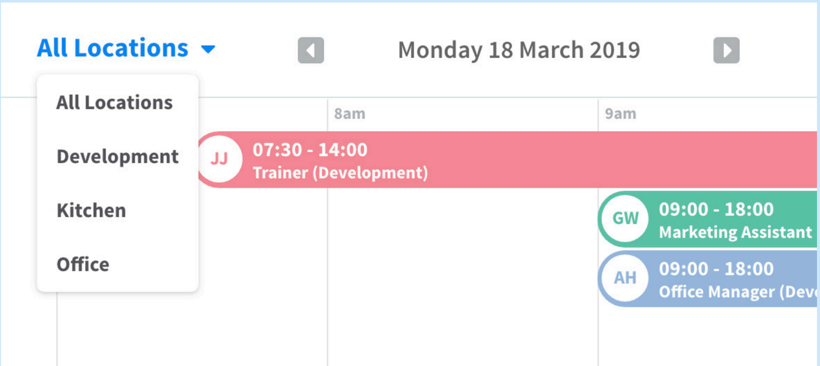
Each employee and their working times is represented by a bar on the chart. Hover over their initials to see who the employee is.

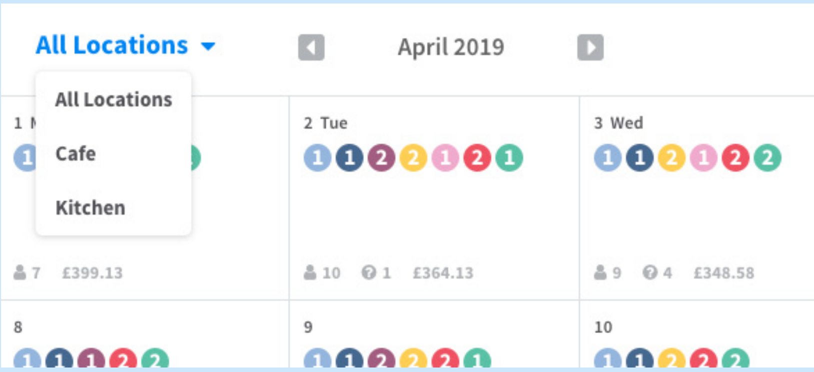
Their Role is written in the bar and is denoted by the colour assigned to that role.

In the Day View, you can also choose how you'd like the shifts to be ordered by clicking 'Sort By'. This will give you the option to view your shifts either in the order they occur, or grouped by role.



In both views of the Dashboard, you can select which location you would like to view from the dropdown in the top left. Alternatively, if you would like an overview of all shifts across your account, you can view 'All Locations'.



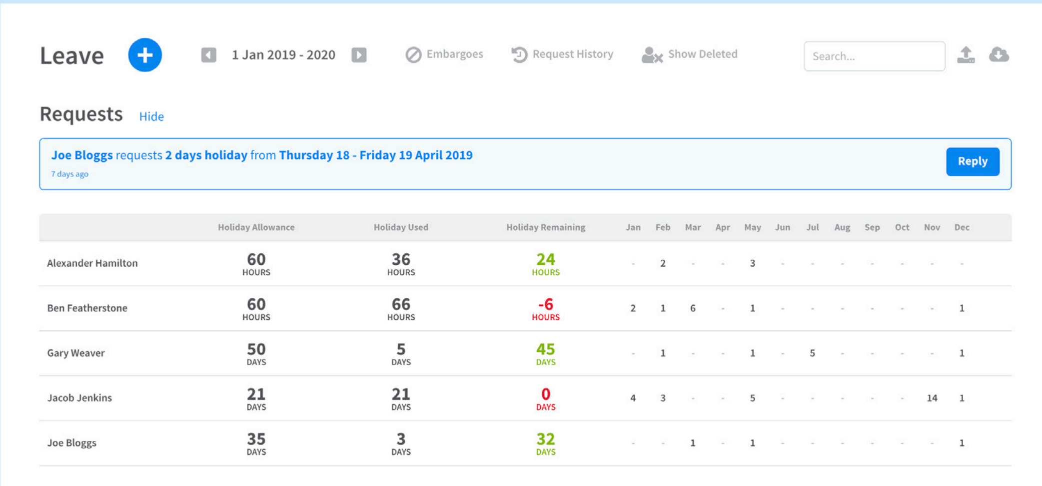


Managing Leave

Getting started

RotaCloud allows you to add leave onto the system for staff, as well as approve or deny requests made by your employees. Different leave types that can be added to RotaCloud include Holiday, Sickness, Other Leave, Maternity/Paternity, Public Holiday, Absence (Authorised) and Absence (Unauthorised).

Clicking 'Leave' will take you to the main Leave page. This will show Leave Requests from your employees that require actioning at the top of the page, and the Leave Calendar below this.

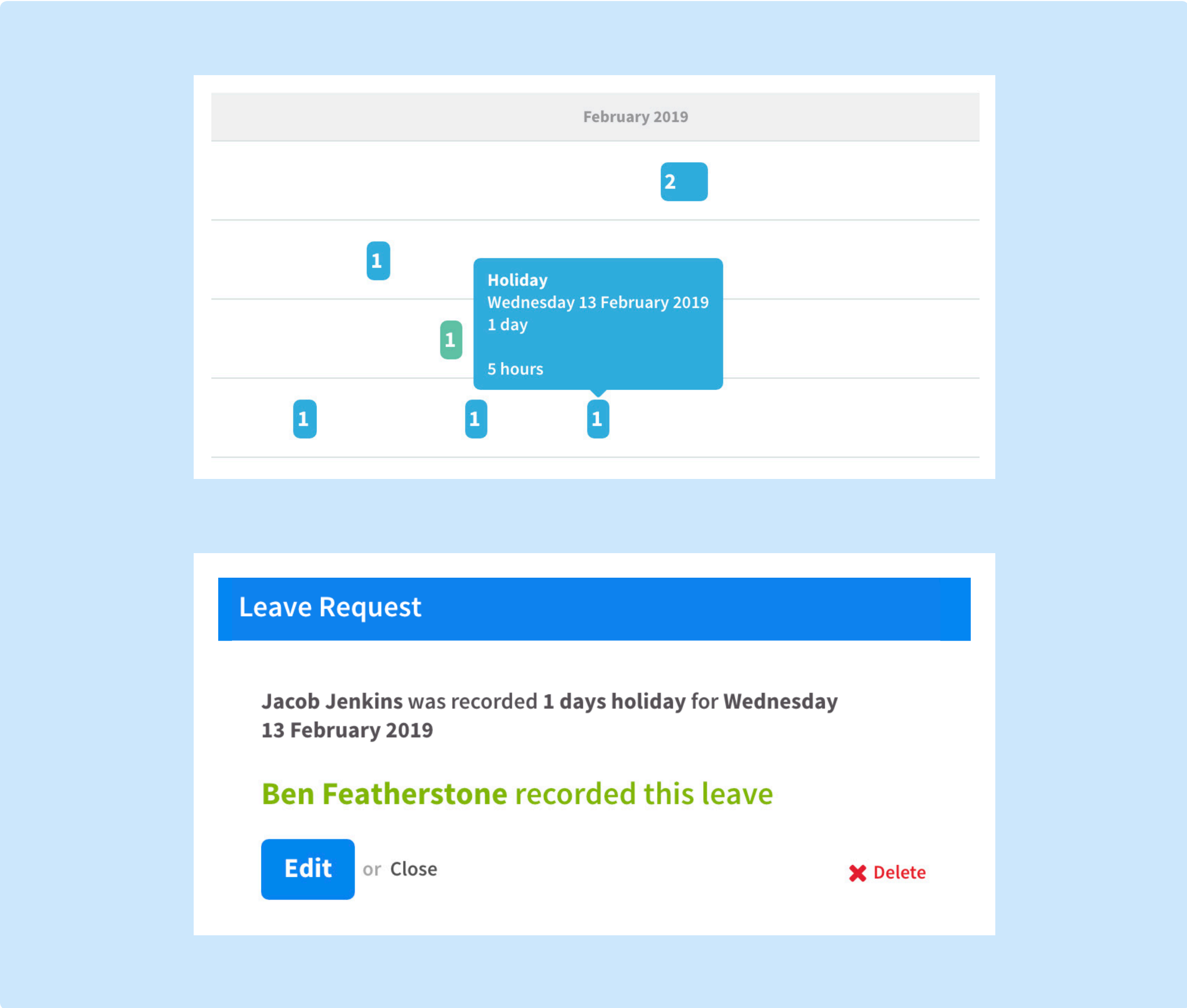


The columns tell you each employee's Holiday Allowance, along with how much of this has been used and how much is remaining.

The colours in the Holiday Remaining column indicate how much of an employee's allowance has been used.

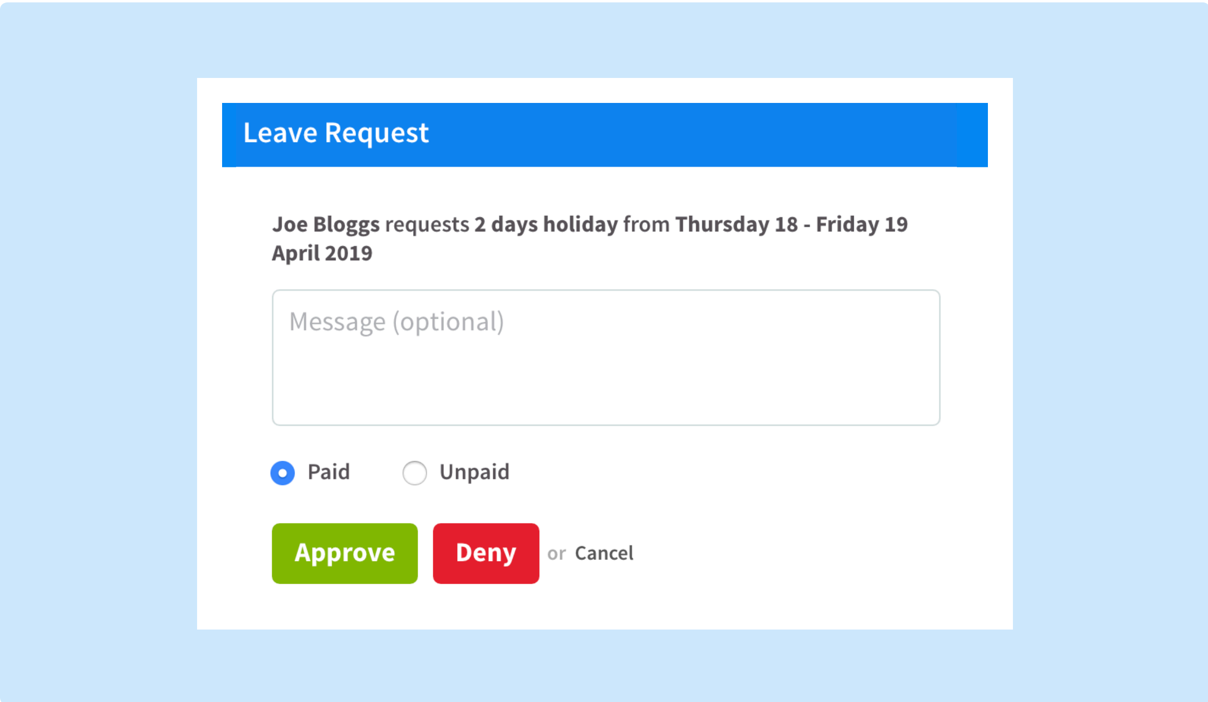
The number beneath each month shows how many days of leave that employee has taken (and plans to take) that month. If you click on this figure, it will open up the month to be viewed in more detail.

This will allow you to open up the specific leave for the employee. Hovering over the leave entry will give you details of the leave type (these are also colour-coded), the dates of the leave, and number of hours it has been assigned. If you want to edit or delete this leave entry, all you need to do is click on it; you'll then get a pop-up box with these options.



Responding to leave requests

Employees can request Holiday and Other Leave through their account. These requests will appear as notifications on the bell icon in the top-right of RotaCloud, and also at the top of your Leave page. To action these requests, click 'Reply'. This will open up a box giving you the option to Approve/Deny the request. Select if you want the leave to be Paid/Unpaid, and, if you like, add a note for the employee to see.

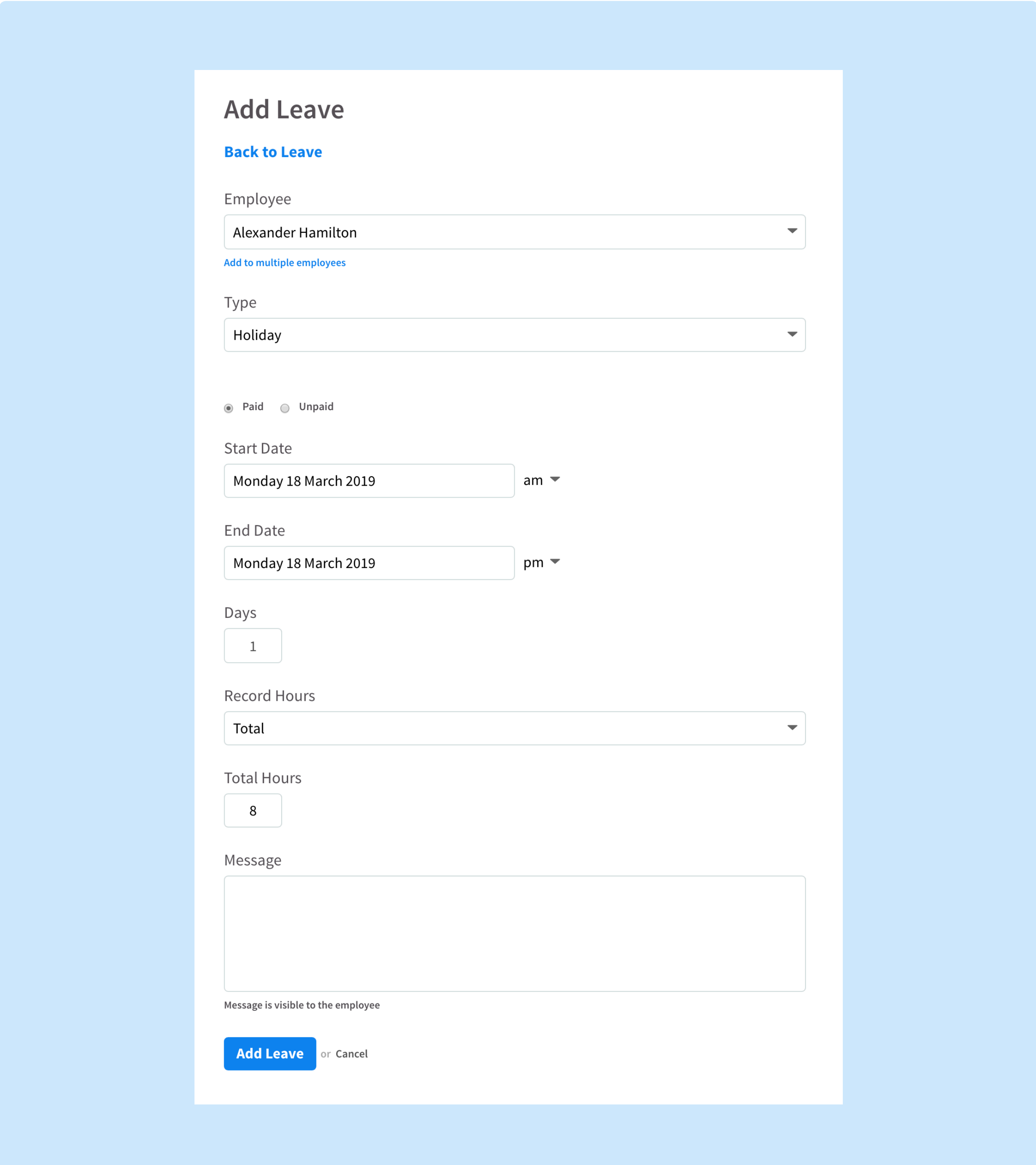


If there is no clashing shift(s) added for that user, the leave will then be added and will appear on their calendar. If there is a clash, you'll be made aware of the shift and asked if you would like to 'Do Nothing', 'Unpublish', 'Move to Open Shifts', 'Move to Open Shifts and Unpublish', or 'Permanently Delete' (we'll go into detail about each of these below, don't worry).

You can prevent Employees from making any Leave request which will exceed their annual allowance. This setting can be found in the Settings menu (cog icon)

Creating a new leave record for an employee

To add a new leave record, click the blue plus button. This will then prompt you to select an employee, leave type, paid/unpaid, start/end date (you can also use the AM/PM at the end of these if the employee isn't taking a full day off) and enter the number of hours this will be. You can then click 'Add Leave'.



If the leave doesn't clash with any shifts, it will be added to the Leave Calendar. If there is a shift clash, you will be asked what you would like to do with the shift and will be given the options below:

Do Nothing adds the leave on top of the shift.

Unpublish adds the leave over the shift but stops the shift being visible to the employee.

Move to Open Shifts adds the leave and allows another employee to claim the shift.

Move to Open Shifts and Unpublish adds the leave, moves the shift to open shifts, but doesn't allow other employees to claim it yet.

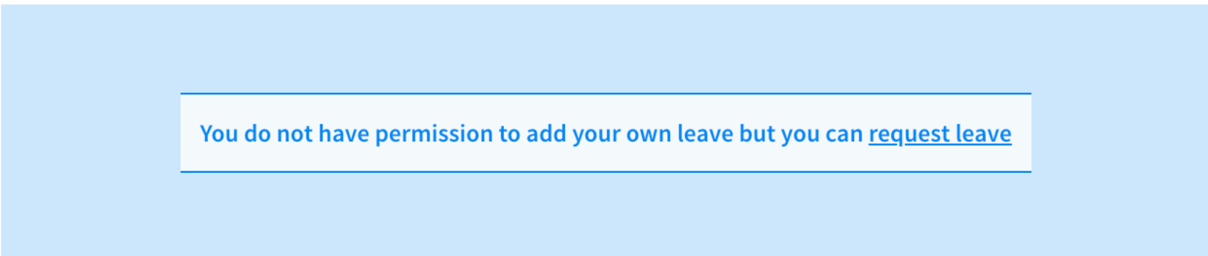
Permanently Delete removes the shift and replaces it with the leave.

Adding leave for yourself

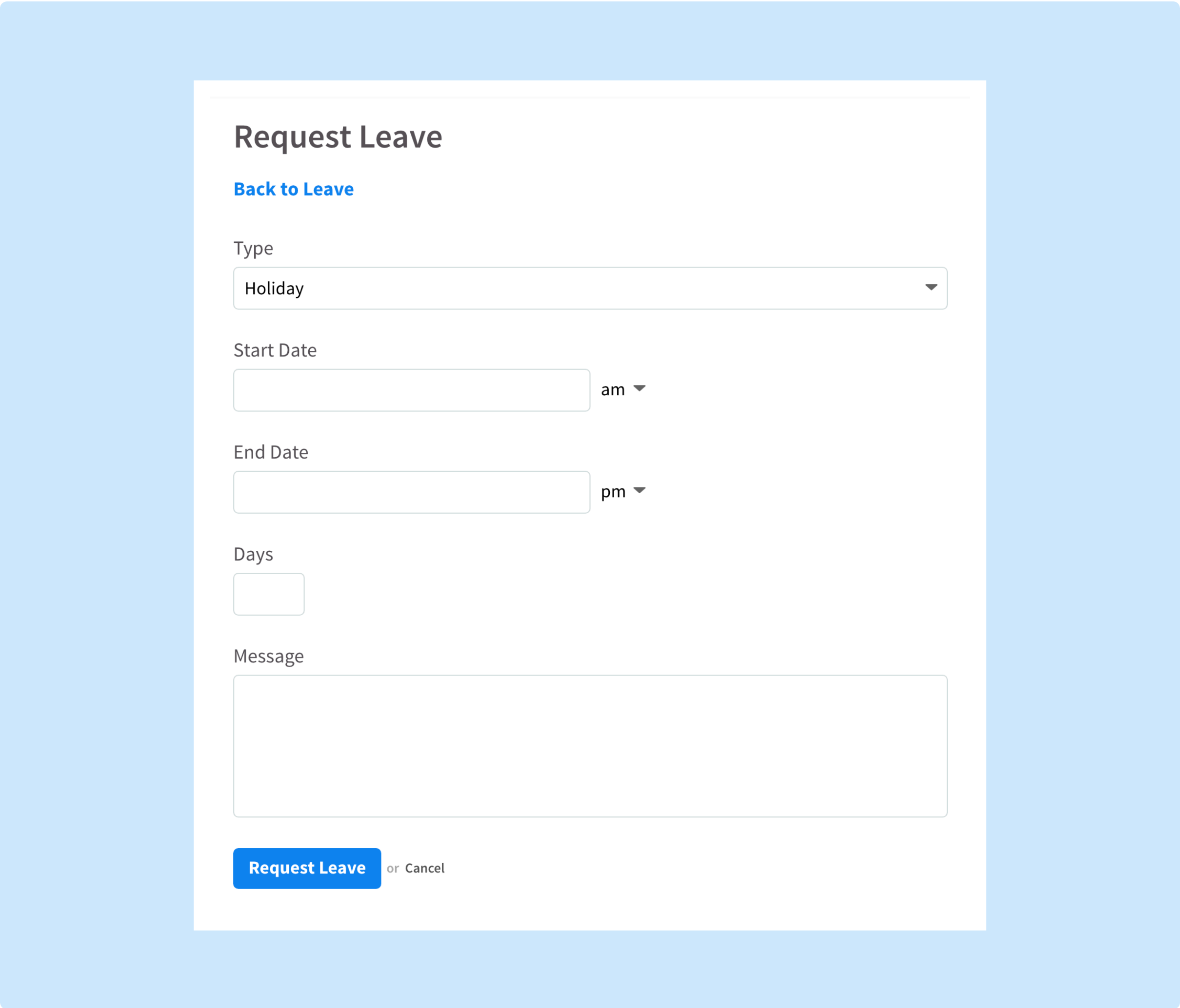
If you're an Admin, or a Manager with the permission to add your own leave, this is done in the same way as adding leave for Employees.

If you're a Manager who requests leave, you can do this by going to Leave, clicking the blue plus button, and selecting your name from the dropdown list.

When you do this, a blue bar will appear at the top of the page which will make you aware that you cannot add your own leave. Within this blue bar, click 'request leave'.



You'll be redirected to a page that will allow you to enter select your leave type, enter your dates, and add a message if you like. Once you've done this, click 'Request Leave' and your request will be sent for approval. In the meantime, this will show at the top of your Leave page. Up until the time it is approved, you can cancel your leave request.

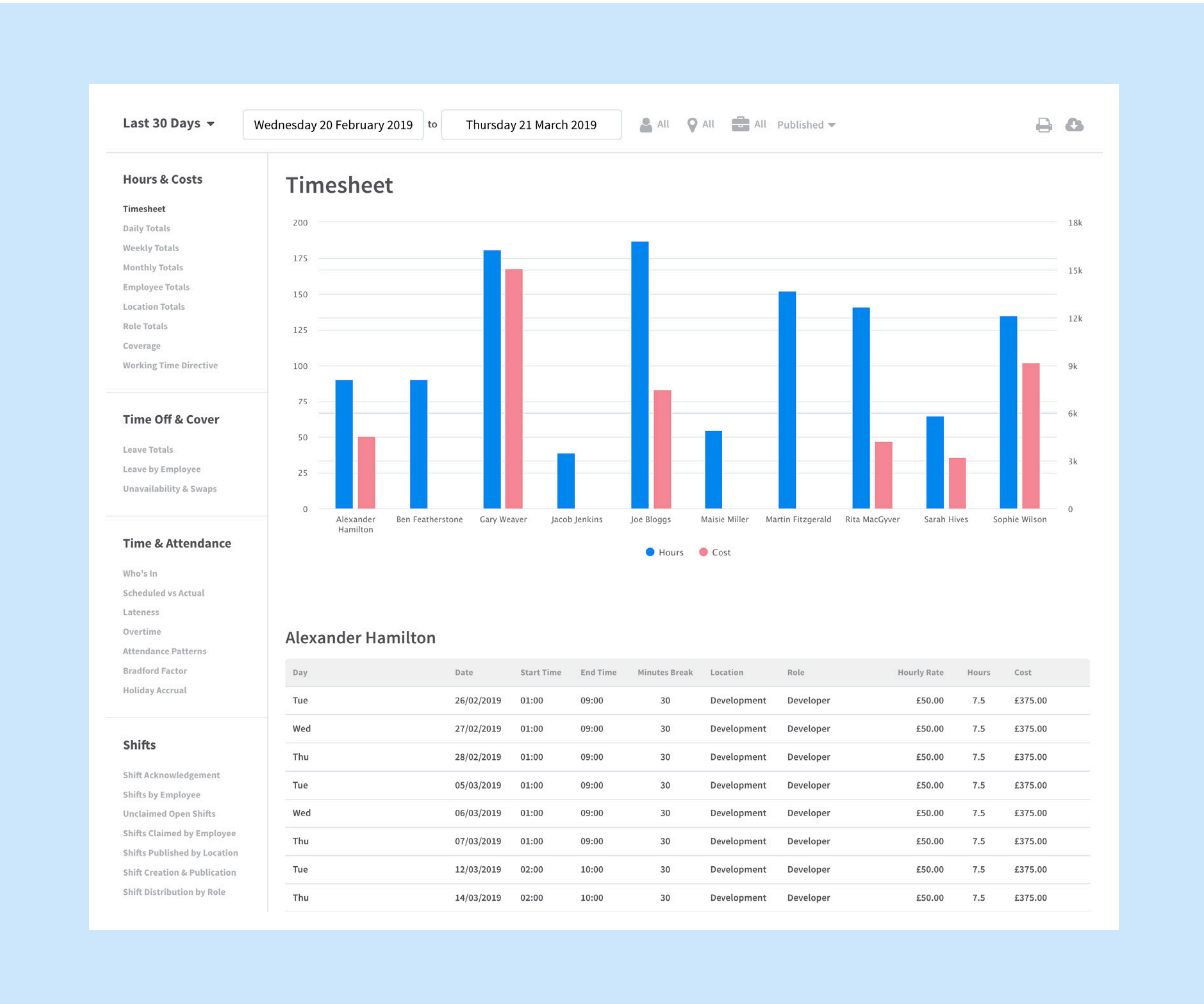


Reports

Getting started

Your reports section is used to visualise and summarise all the data you have in RotaCloud. You can run reports relating to shifts, cost, leave and attendance (if applicable). Reports can be accessed by clicking 'Reports' in the navigation bar.

When you open your Reports section, you'll see your report filters across the top, your accessible reports down the left-hand side, and the download and print buttons in the top right.

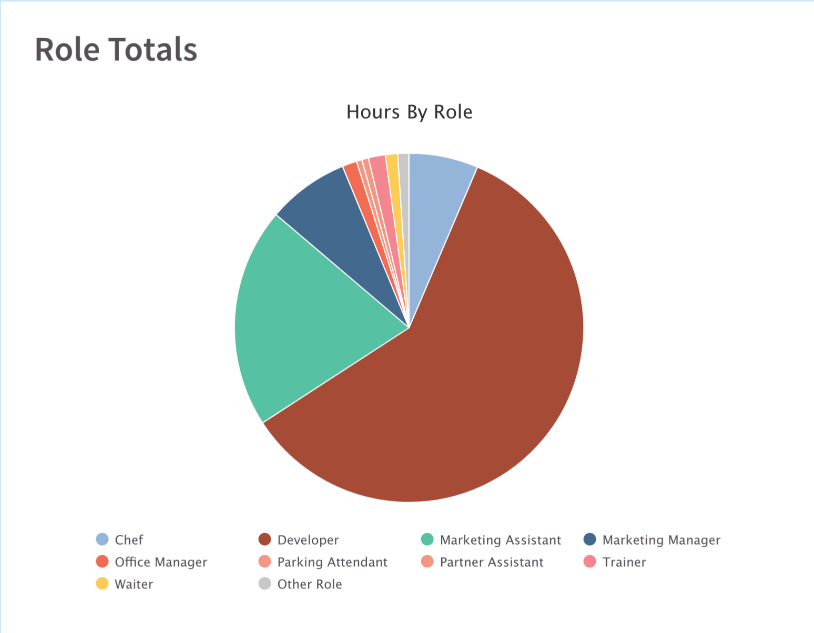


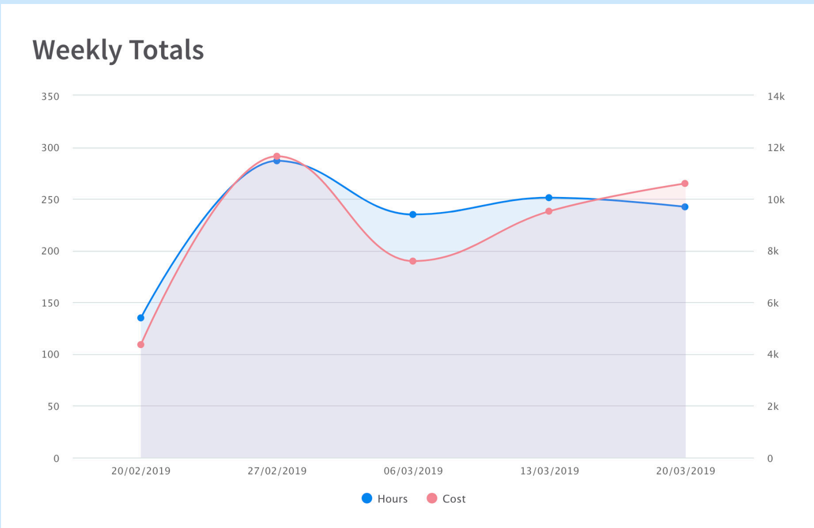
Different reports have different filters, but these can include:

- Pre-set date range
- Customisable date range (up to one year)
- Employees
- Locations
- Roles
- Published/Unpublished
- Scheduled/Actual
- Paid/Unpaid

Understanding your reports

- **Daily Totals** - shows the total number of hours worked and the resulting total cost estimate across the company per day.
- **Weekly Totals** - shows the total number of hours worked and the resulting total cost estimate across the company per week.
- **Monthly Totals** - shows the total number of hours worked and the resulting total cost estimate across the company per month.
- **Employee Totals** - shows the total number of hours worked and the resulting total cost estimate across the company per employee.
- **Location Totals** - shows the total number of hours worked and the resulting total cost estimate across the company per Location.
- **Role Totals** - shows the total number of hours worked and the resulting total cost estimate across the company per Role.
- **Coverage** - shows the number of employees working at particular times during the selected date across the company.
- **Working Time Directive** - allows you to view each employee's average weekly hours across a specified number of weeks compared to your specified number of hours.


Role Totals
Hours By Role
Chef
Developer
Marketing Assistant
Marketing Manager
Office Manager
Parking Attendant
Partner Assistant
Trainer
Waiter
Other Role

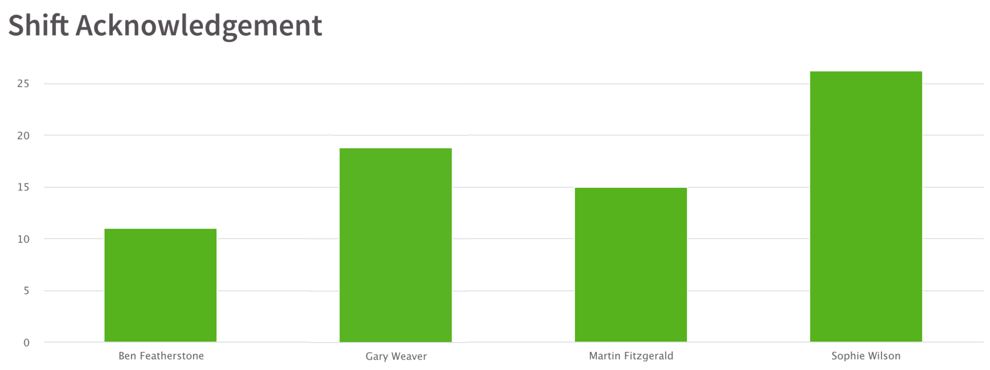

Weekly Totals
350
300
250
200
150
100
50
0
14k
12k
10k
8k
6k
4k
2k
0
20/02/2019
27/02/2019
06/03/2019
13/03/2019
20/03/2019
Hours
Cost

Time off & cover:

- **Leave Totals** - shows the total number of days' leave across the company per employee, for the specified time period.
- **Leave by Employee** - a list of each employee's leave records.
- **Unavailability and Swaps** - shows various pieces of data regarding unavailability and swap requests, including the percentage of shifts each employee has requested as Unavailability and Swaps. Also shows how many shifts each employee has covered for others.

Shifts:

- **Shift Acknowledgement** - shows what percentage of shifts were acknowledged per employee.
- **Unclaimed Open Shifts** - shows how many open shifts there are by location.
- **Shifts Claimed by Employee** - shows shifts each employee has claimed.



Employee	Total Shifts	Shifts Acknowledged	Percentage
Alexander Hamilton	23		
Ben Featherstone	57	6	11%
Dave MacKaye	11		
Gary Weaver	43	11	26%

Time & Attendance:

- **Who's In?** - shows who's currently clocked into a shift.
- **Scheduled vs Actual** - compares each employee's scheduled shifts, hours, and costs with their actual shifts, hours, and costs.
- **Overtime** - show which employees have worked over/under their weekly hours.
- **Lateness** - shows median and total charts for lateness, per employee.
- **Attendance Patterns** - shows average lateness per employee for each day of the week.
- **Bradford Factor** - uses Sickness and Unauthorised Absence to calculate each employee's Bradford Score.
- **Holiday Accrual** - calculates how many hours' holiday each employee has accrued based on their paid hours.

Who's In

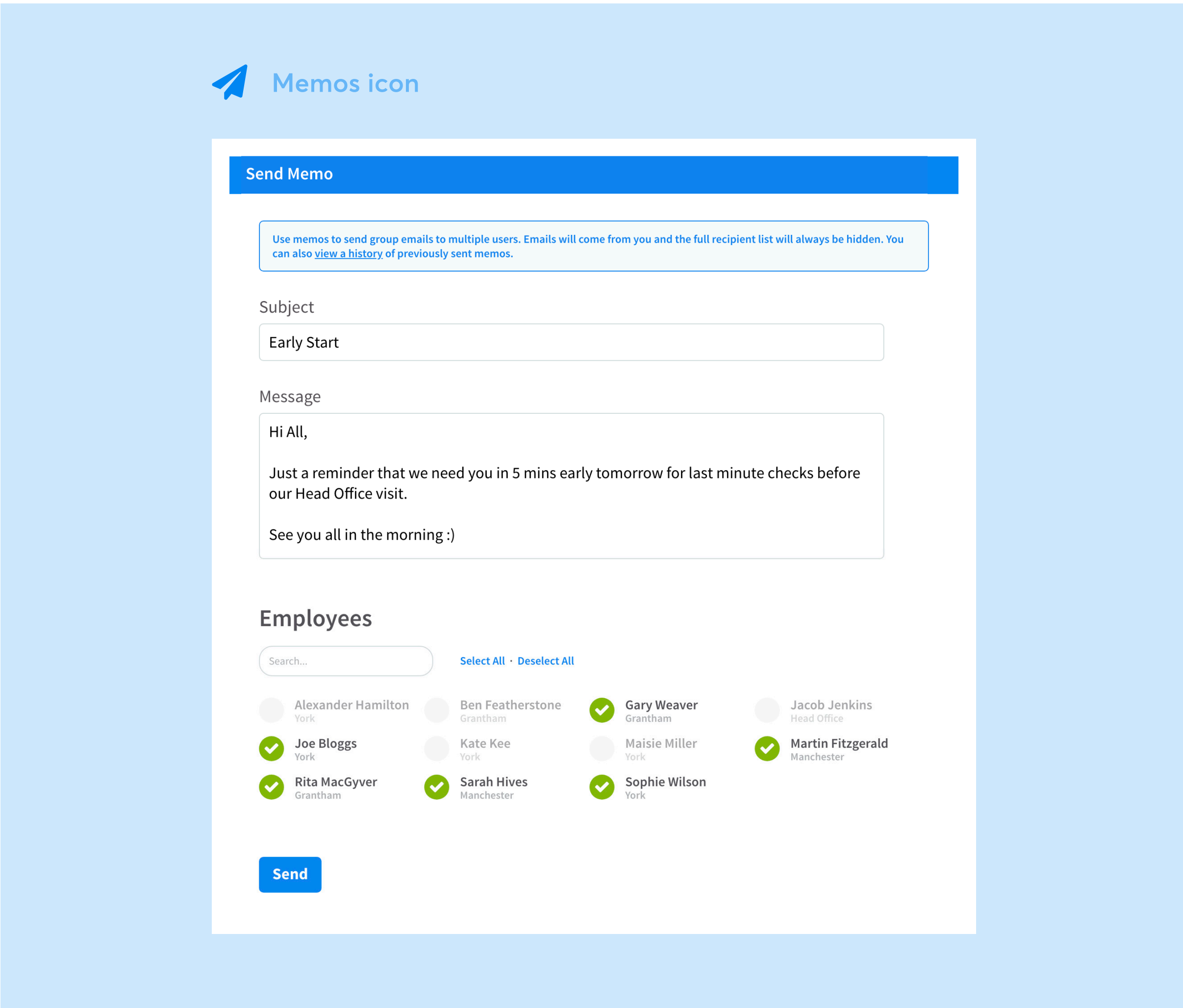
Development

Employee	Group	Role	Status	In Time	Current Break Start Time
Gary Weaver	Grantham	Marketing Assistant	CLOCKED IN	09:01	-
Martin Fitzgerald	Manchester	Developer	CLOCKED IN	09:00	-
Rita MacGyver	Grantham	Developer	CLOCKED IN	08:48	-

Sending memos

RotaCloud allows you to send memos to your employees. This feature is only accessible to Admins and Managers. An Admin can send these to all users on the account, while a Manager can send these to Admins and the employees assigned to their Locations.

To send a Memo, **click the paper plane icon** in the top right of your screen.



You'll then be shown a box and be given the option to add a subject, a message, and select the users you want to send this message to. Once you've done this, just click 'Send' and this will come through to your employees as an email.

To view a history of your sent messages, open the Memos section and click 'view a history' in the blue bar across the top. Here, you can see the date the message was sent, the subject, and the percentage of your employees who've seen this message.

Please be aware, you won't be able to view the text sent within the message. If you need a record of this, you might want to include yourself as a recipient when sending.

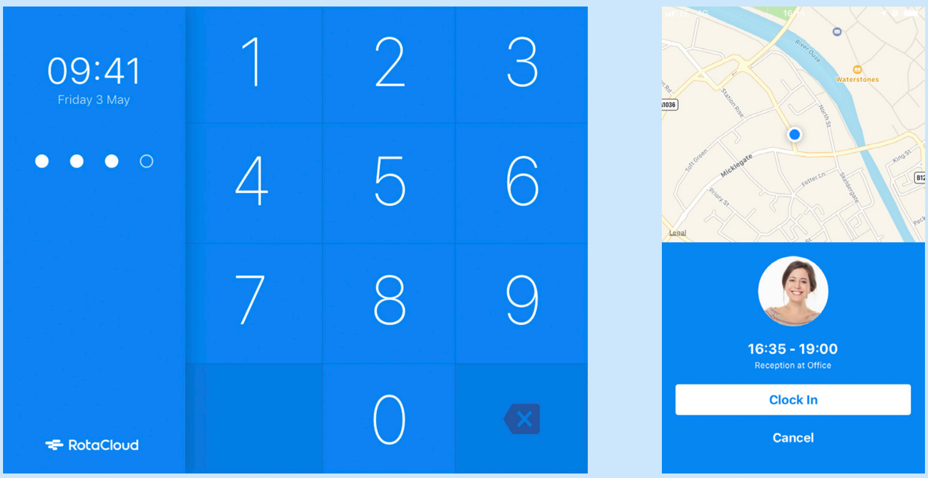
Time & Attendance

Please be aware the following only applies if you have Time & Attendance enabled on your RotaCloud account.

Time & Attendance allows employees to clock in and out of shifts, and for you to manage timesheets and run payroll reports.

There are two ways employees can clock in/out:

- Using their mobile phone and the RotaCloud app. When an employee has an upcoming shift, they will see a 'Clock In' button on their app. You can choose to restrict this so that employees can only clock in while at your workplace.
- Using a fixed terminal. For this, you'll need to download the RotaCloud Terminal app to an iPad or Android tablet. This acts as a fixed clocking-in point for multiple employees to use. Employees will each be sent a four-digit PIN to use to clock in and out. This method also allows photo taking to discourage staff from swapping PINs and clocking each other in.



Your employees' timesheets can be found in the Attendance section of RotaCloud. On the Attendance page, you will see your employees' names down the left-hand side, and above this, a dropdown list of your past pay periods. The timesheet will show the employee's shift, Location, Role, clock in and out times, and length of break. This is then used to calculate 'Hours Paid'.

The clock in and out times can be edited by an Admin or Manager (depending on permissions).

Highlighted records on timesheets

In the list of Employees down the left-hand side of your Attendance section, you'll see your employees have either a green tick or an amber number. A green tick means the employee's attendance records are all up-to-date and approved; the amber number indicates how many records on that employee's timesheet require your attention.

When you click on an employee whose records require attention, the shift(s) will be highlighted on their timesheet with an amber triangle. If you hover over this, you can see more information about this warning.

1 shift is missing an attendance record - this typically means there is no clock in/out data for this shift. This could also be because the clock in time has not linked with the scheduled shift.

1 leave record without confirmed hours - this means you need to enter a figure in the 'Hours Paid' column for the leave entry. This column will need to be populated, even if you enter '0'.

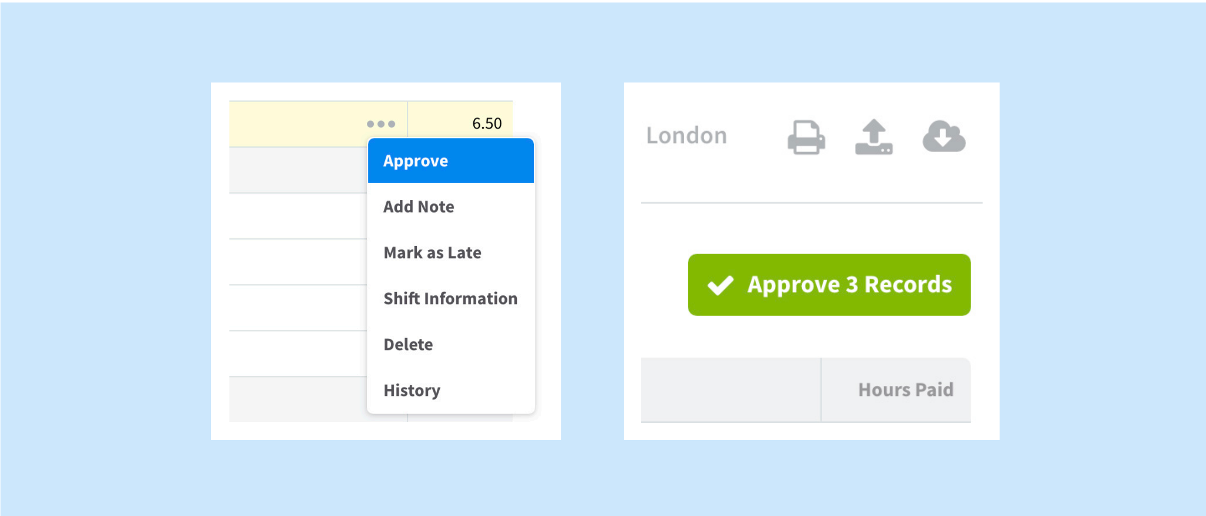
Late clock-ins will also flag on timesheets, but will not flag in your employee list.

Approving timesheets

Once you're happy with an employee's clocking in/out data, you'll need to approve it.

Unapproved records appear in pale yellow as opposed to white. You can approve the day for each employee individually by clicking the three grey dots at the end of the day's entry and clicking 'Approve'.

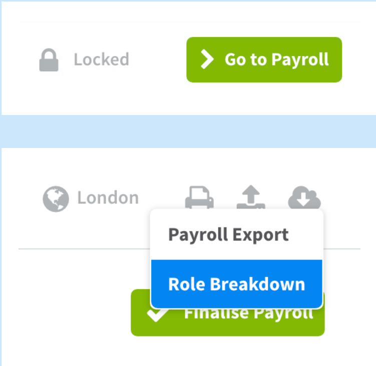
You can also approve these in bulk for that pay period to date by clicking 'Approve x Records' in the top-right corner.



Locking timesheets and running payroll reports

When you've approved all your timesheets, you can run your payroll reports. Before you do this, you may wish to lock your pay period down first. Locking a pay period can only be done by an Admin and means that no more changes can be made. Once locked, employees won't be able to clock in/out of those shifts, and timesheets can no longer be amended (this can be unlocked at any time by an Admin).

You can now click 'Go To Payroll'. This will generate a payroll report which includes hours worked, hours paid, and paid and unpaid leave.



You also have the option to view this as a Payroll Export or Role Breakdown when clicking the download icon.

Finalising your payroll

To add an extra level of security against changes to your payroll, you can choose to 'Finalise Payroll'. Finalising a payroll means the figures will lock and will therefore not be affected by a change in, for example, role rate (please be aware reports will still be affected by this change as they always run off live data).

To finalise your payroll, click the green 'Finalise Payroll' button in the top right of your Payroll page. If you need to unfinalise it again, you can click 'Unfinalise Payroll' in grey.

Setting Up Clocking In/Out Restrictions

When you have Time & Attendance on your account, your Locations become more relevant as you can set them up as a physical location for your employees to clock in/out from, or restrict clocking in to a Location by IP address.

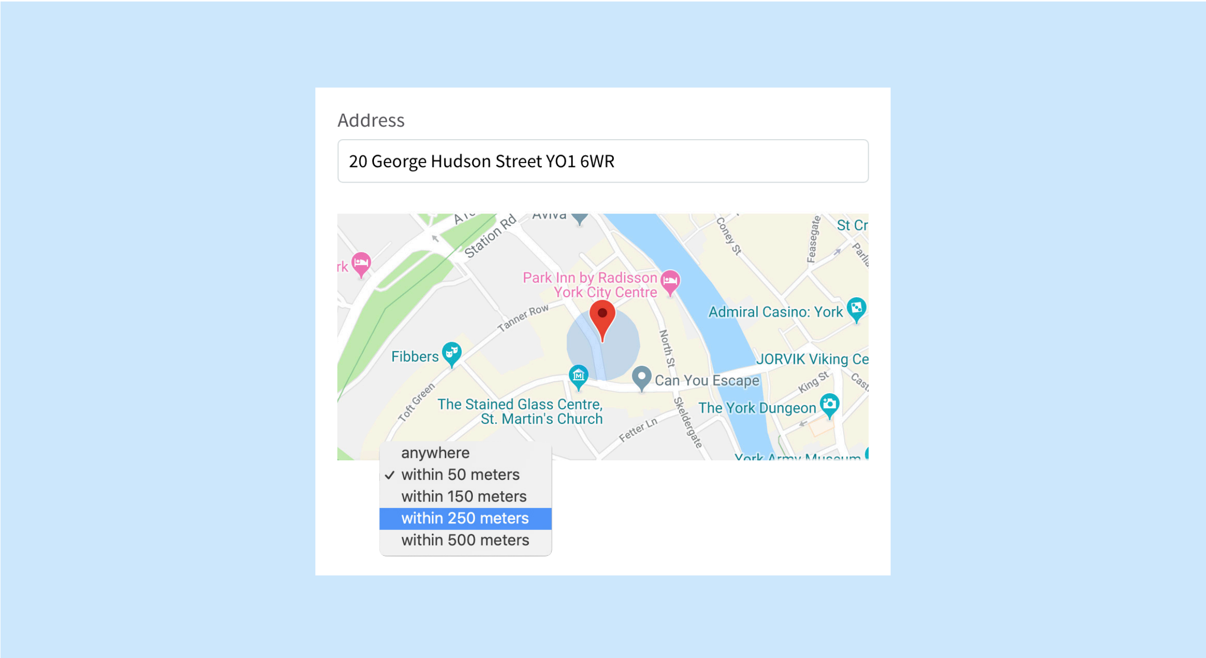
Please Note - It is important that you only use this setting if you have a static IP address. If you are unsure please check with your internet service provider.

It applies on both your terminals and the mobile app, and each timesheet record will come with a location attachment showing you where the clock-in and clock-out took place.

To do this, go to Company > Locations. Open a location to add an address. Add an accurate address (including house name/number and postcode). You should then see your workplace on a map — ensure the marker is in exactly the correct place. Once your Location's address is set up, you will need to choose if you wish to use GPS restriction, IP address restriction, or both.

GPS Restriction:

1. Check the box next to 'Restrict clock in to the location address, with specified range' to enable GPS-based restriction.
2. Choose your radius using the drop-down menu labelled 'Employees can clock in/out from'. You may need to choose a different radius depending on the size of the workplace.
3. The radius will show on the map as a blue circle.
4. Click save.



If you do not enter an address or you set your radius as 'Anywhere' your employees do not need to be at your given address and can clock in from anywhere. If you choose to do this, the Attendance section will show you where the employee was on the map when they clocked in and out.

IP Restriction:

1. Check the box next to 'Restrict clock in to a specific IP address' to enable IP-address-based restriction.
2. Enter your workplace's IP address(es) in the field below. If you want to allow clock-ins from multiple IP addresses, separate them with a comma.
    - These IP addresses must be static, to prevent them from changing and preventing all staff from clocking in. Please speak to your Internet Service Provider to ensure you have a static IP address.
3. Click save.

For clocking in/out using mobile phones, employees must ensure they have their location setting enabled.

Account settings

Account settings can only be controlled by Admin users. These can be found by clicking the cog icon in the top right of your screen. You will then see a menu down the left-hand side for the different sections of your Settings.

Settings

This is where you can set and enable various aspects of RotaCloud relating to your Rotas, Unavailability, Shift Swaps, Leave and Time & Attendance. The settings in this section apply across the entire account.

Billing

You can use this section to enable/disable any package upgrades such as Time & Attendance or SMS. If you choose to pay for RotaCloud by card, you can also enter and change your details here.

Company details

This is where you set your account timezone, address and currency.

Your details

This is the section you will use to change your email address. Your employees also have this section should they need to change their email address.

Notifications

Each user can customise their notifications settings to choose how and when they are notified about rota changes and leave requests.

Passwords and security

In this section, you can change your password and enable two-factor authentication (a unique code is sent to your phone) to make your account more secure.

Clocking in

Here you can view and change your clocking-in PIN (if applicable).

Referrals

If you'd like to be part of our referral scheme, this is where you'll find a referral link to send other potential users. Want to know more? Get in touch with a member of the RotaCloud team and we'll tell you all you need to know!

API and webhooks

This section is used when setting up integrations with other software. You can generate and enter your API keys here.

Troubleshooting

If you have any questions about RotaCloud that haven't been covered in this guide, we have loads of detailed articles in our online Help Section. You can access this at **help.rotacloud.com.**

You can also chat with a member of the team to ask any questions you may have by clicking the speech bubble in the bottom corner of the RotaCloud website — we're available **Monday to Friday, 8am–5pm** and typically get back to you within 10 minutes. If you message us out of hours, we 'll get back to you on the next working day.

Alternatively, if you'd rather use email to ask your question, please send your email to **support@rotacloud.com**

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