

Using the Rota

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1.0 What is the Rota and Where to Start

The Rota is a means of defining the shifts, by Group, that individual employees should work each day.



You can do this using predetermined patterns or randomly. It will also allow you to pre-book shift swaps between employees and also pre-authorise Overtime if required. (More Daily Rules and Work Schedules will be required to pre-authorise OT.)

1.1 When to Use the Rota and Getting Started

Use the Rota option if your employees' hours of work do not fit regular repeating patterns or you want to pre-book shift swaps or pre-authorise Overtime. Or if you would like to select a Group of employees and schedule the Daily Rules they will be working on a given day.

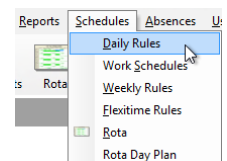
1.2 Define Groups and Cost Centres

In System Settings you must define the Groups that Employees will belong to, and optionally set up cost centres (this is true for all employees, using the Rota or not).

Ensure The Rota Enabled tick box is only ticked for Groups you want to use for the Rota. Click on a Group to open the Edit Group options.

1.3 Set up Daily Rules and Work Schedules

Now set up a Daily Rule and Work Schedule to enable the Daily Rules to be applied to the Rota. See Schedules/Daily Rules and watch the video [here](#).



The Daily Rule and a Work Schedule may look something like this....

Make a **Rota Template Rule Daily Rule** and **Work Schedule** that will apply to the Rota if required/selected.

Choose Calculate if you are going to type in the shift start and end times on the Rota. This Daily Rule will be the template from which the system will work out the various settings based on the difference between the typed in start and end times and the ones on this rule.

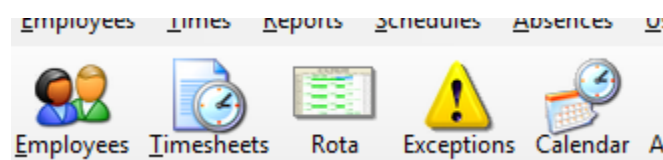
This shift is then used in the Default Daily Rule section for the Rota Template Rule.

1.4 Setting up Employees

Assign the Employees to their Groups and set their default cost centre if required. **Set a Rota Template Rule** if you are going to be **typing start and end times** into the Rota or the Schedule for Rota if you have patterns of shifts.

NOTE: Multiple Cost Centres may be applied to a Daily Rule – if this isn't available in your system please contact support@chronologic.co.uk.

Now go to the Rota menu.



2.0 What you can see on the Rota

Depending on which options are ticked in the Options drop down, you will see more of less detail on the Rota.

2.1 Totals

Daily Cost: Monetary values are calculated as the product of hours worked and basic rate of pay multiplied by the Rate Factor. Monetary values are only visible if enabled in the User Setup screen (Pay option).

Budget: You can have a Daily or Weekly Budget that is entered in the Budget row at the bottom by double clicking in the appropriate cell and typing in the values required.

Absences: Absences show on the Rota highlighted in the colour from the Absence definition.

Limit: This is the limit set in the Employee Rules tab, Rota Weekly Limit Hours. If the employee is scheduled to work more hours than this then the Total Hours will be highlighted in Red as seen above.

Daily Rules that have been rotaed for an employee while they are working in another group will be highlighted in this group in Grey.

You can choose which Cost Centre the Daily Rule is going to accrue hours to (if not selected in the Rule itself) using the drop down at the top of the screen.



3.1 By Clicking on the Cell in the Rota

Once you have clicked on a cell you get the opportunity to just type in the start and end time.

Or...

Select the shift you want if it is in the list or click on 'Find...' or 'More...' to show the full list of rules.

	Mon 09 Feb	Tu
Andrew Hosegood	08:00 - 16:30	

08:00 - 16:30
Staff Weekdays 0900-1630
Find...
More...

Clicking on 'Find...' gives the user the opportunity to type in a starting time for the shift to be entered. Once the time has been entered press < enter > and a list of probable shifts will show. Click on the Daily rule you require.

3.2 By Dragging and Dropping from the List

Alternatively, you can 'Drag and Drop' the daily Rule you require from the list on the left hand side onto the Rota. If you use the CTRL or SHIFT key while dragging you can add a Rule to the cell for split shift situations.

3.3 By Highlighting a Group of Cells and Populating from a Work Schedule

If you left click and drag to highlight the cells you want to populate and then right click on them you can choose which work schedule to use to automatically fill the Rota for you.

If you click on the top left hand cell you select all the cells in the matrix. Right clicking then gives you the option to populate from defaults. (See Day Plan addendum for more information.)

3.4 Deleting a Daily Rule from the Rota

To Delete a daily rule from the Rota, left click on the cell and select the topmost (empty) rule. Shown here highlighted in blue.

08:00 - 16:30
Staff Weekdays 0900-1630
Find...
More...

3.5 Employees who are scheduled on more than one Rota

If an employee is scheduled to work on another Rota, the cell will be occupied by a 'greyed' Daily Rule, and the tool tip will indicate which Rota they are scheduled to work.

Split shifts are shown on separate lines for each day.

	Fri 13 Jun	Sat 14 Jun	Sun 15 Jun	Mon 16 Jun	Tue 17 Jun	Wed 18 Jun	Thu 19 Jun	Basic	Limit	Total	Cost
AB12 CDE Digger											
Jim Andrews	0900-1730 Sales			0800-1630 Financ	0700-1600 MPW		0700-1600 MPW	34:00		34:00	340.00
John Ford		1800-2300 MPW	Holiday	[17:30 - 23:00]	1800-2300 MPW	[17:30 - 23:00]					
		[23:00 - 04:00]		[23:00 - 04:00]	[23:00 - 04:00]	[23:00 - 04:00]		41:00		41:00	2,587.10
Julie McGill	[17:30 - 23:00]	[17:30 - 23:00]	[17:30 - 23:00]	[17:30 - 23:00]	0700-1200 B'Fast						
					[17:30 - 23:00]			32:30		32:30	325.00
Anna Richards		1800-2300 MPW	[17:00 - 22:00]	1800-2300 MPW	1800-2300 MPW	1800-2300 MPW		25:00		25:00	250.00
Charlotte Robson	[11:00 - 23:00]	Day Off	Day Off	Holiday	Holiday	Holiday	Holiday	11:30		11:30	115.00
Vicky Smith	[09:00 - 17:00]	Missed Clocking	1430-2300 Hotel I	Missed Clocking	Early In						
		1430-2300 Hotel I		0700-1530 Hotel I	1430-2300 Hotel I			39:30		39:30	395.00
Day Hours	32:30	28:30	18:30	37:00	42:30	15:30	09:00			183:30	
Day Cost	325.00	816.00	185.00	927.55	956.00	712.55	90.00				4,012.10
Budget										100%	4000.00

Tip of the Day

Use the Right Click on the employee names to give you options:

Most of these are obvious.

Clear Recent Rules List enables the user to remove the rules that show when a cell is clicked on for an employee.

You might want to do this if a particular employee has been working in one department and is now working lots of different rules and the list on clicking on the Rota cells is becoming too long.

Alastair Slade	Copy Schedule
Angie Young	Employee Details: Alastair Slade
John Smythe	Timesheet
Flo Lloyd	Calendar
Julie Smythe	Go To Default Work Schedule
Lynda Carter	Book/Delete Absence
Andrew Jones	Populate From Work Schedule
Daniel Redmc	Clear Schedule
	Clear Recent Rules List

4.0 Reporting

4.1 Printing the Rota

This is the printout of a planned Rota. This can be printed with or without the hours and cost columns to enable it to be given to employees to confirm when they are expected to work.

Maintenance - Mon 08 Jan 2007									
	Mon 08 Jan	Tue 09 Jan	Wed 10 Jan	Thu 11 Jan	Fri 12 Jan	Sat 13 Jan	Sun 14 Jan	Inc. Absence Hours	Cost
Michael Chauvin			M3 14:00 - 19:00	M3 14:00 - 19:00	M3 14:00 - 19:00			15:00	90.00
Neal Johnson	M2 10:00-14:00	M2 10:00-14:00						08:00	48.00
Timothy O'Hara				M1 05:00 - 10:00	M1 05:00 - 10:00			10:00	50.00
Alex Varia	M1 05:00 - 10:00	M1 05:00 - 10:00	M1 05:00 - 10:00					15:00	75.00
Day Hours	09:00	09:00	10:00	10:00	10:00			48:00	
Day Cost	49.00	49.00	55.00	55.00	55.00				263.00

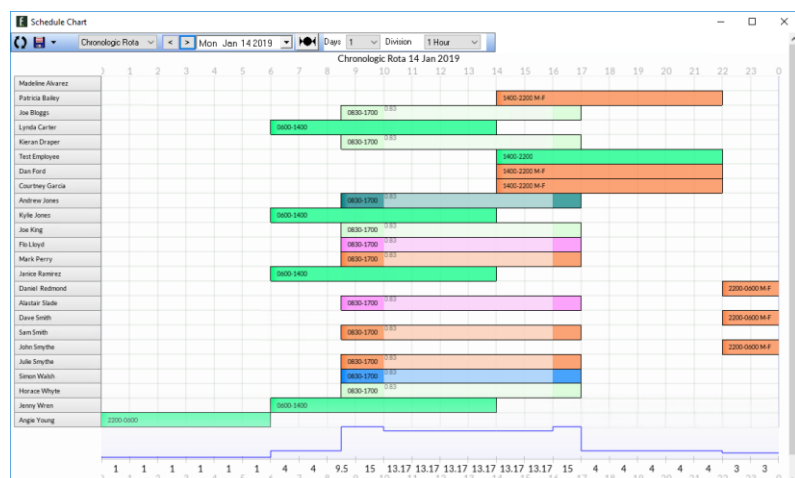
4.2 Cost Variance Report

When the employees have worked the Rota, there is a report that enables managers to see what variance there is between the plan and the actual times worked and their associated values.

Cost Variance										
Week Commencing Mon 08 Jan 2007										
Employees in Maintenance Ordered by Number										
Sum Rates ☒ 1 ☒ 2 ☒ 3 ☒ 4 ☒ 5 ☒ 6										
Number	Title	First Name	Last Name	Planned Hours	Actual Hours	Variance Hours	Planned Cost	Actual Cost	Variance Cost	
102466	Mr.	Timothy	O'Hara	10:00	10:00		50.00	50.00		
102479	Mr.	Michael	Chauvin	15:00	14:45	-00:15	90.00	88.50	-1.50	
104267	Mr.	Neal	Johnson	08:00	08:00		48.00	48.00		
108924	Mr.	Alex	Varia	15:00	15:30	00:30	75.00	77.50	2.50	
				48:00	48:15	00:15	263.00	264.00	1.00	

4.3 Hourly Report

You can also view and print a report that shows you the number of employees scheduled to work through the day using several different reporting criteria.



5.0 Populating the Rota

5.1 For One Week

If you have Schedule for Rota set up on the Employee Rules Tab...

Enter the Rota and click on the top left square:

Work Schedule

Uses Rota

Schedule for Rota

Offset (Days)

Rota

CHC Lounge - 06 Jun 2011

	Mon 06 Jun	Tue 07 Jun	Wed 08 Jun	Thu 09 Jun	Fri 10 Jun	Sat 11 Jun	Sun 12 Jun	Total	Cost
Nick Baker									
Ann Clutterbuck									
Libby Clutchley									
Sarah Elliott									
Rebecca Griggs									
Laura Heard									
Daniel Hirst									
Kirsty MacDowell									
Katy McGee									
Kelly Pearson									
Zoe Piper									
Yasmin Rice									
Nick Scott									
Amy Warren									
Munira Whittington									
Day Hours								00:00	0.00
Day Cost									
Budget									

Then right click on the Blue area and select 'Populate from Work Schedule', then click OK.

Rota

CHC Lounge - 06 Jun 2011

	Mon 06 Jun	Tue 07 Jun	Wed 08 Jun	Thu 09 Jun	Fri 10 Jun	Sat 11 Jun	Sun 12 Jun	Total	Cost
Nick Baker									
Ann Clutterbuck									
Libby Clutchley									
Sarah Elliott									
Rebecca Griggs									
Laura Heard									
Daniel Hirst									
Kirsty MacDowell									
Katy McGee									
Kelly Pearson									
Zoe Piper									
Yasmin Rice									
Nick Scott									
Amy Warren									
Munira Whittington									
Day Hours								00:00	0.00
Day Cost									
Budget									

Select a Work Schedule

Select a Work Schedule

Work Schedules:

Defaults

Test 1

Include Work Schedule Columns:

☒ 1

☐ 2

☐ 3

☐ 4

☐ 5

☐ All

Cancel

OK

This will populate the Rota with the default shifts already programmed into the work schedules for the employees as set up in the Employee screen, Rules tab, 'Work Schedule'.

Save the Rota by clicking on the Save icon (floppy disk) 

5.1 Month at a Time Using the Availability Screen – Quickest Option

Open the Availability Screen and click and drag from the top left cell to the bottom right cell for the employees you want to set the schedule for.

Then click on Set Schedule and click on OK to agree to delete any existing records if there are any.

Now click OK to populate the Rota for the full month using the Default Work Schedule as set in Schedule for Rota on the Employee Rules tab, or choose a specific Work Schedule.

You can also choose which Rota Group at the bottom if you don't want to use their Primary Groups, which is the default.

5.2 Year at a Time per Employee on the Calendar

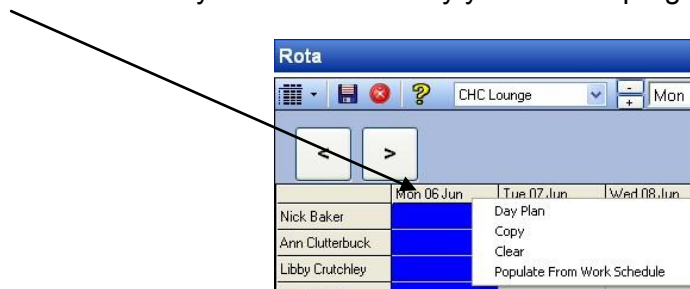
You can also populate the Rota for a full year using the Employee Calendar for one employee at a time. Left click and drag the period you wish to change the employee schedule for on the Calendar and then proceed as above.

This can be useful when working different hours per day based on the time of year, Summer and Winter hours type contracts.

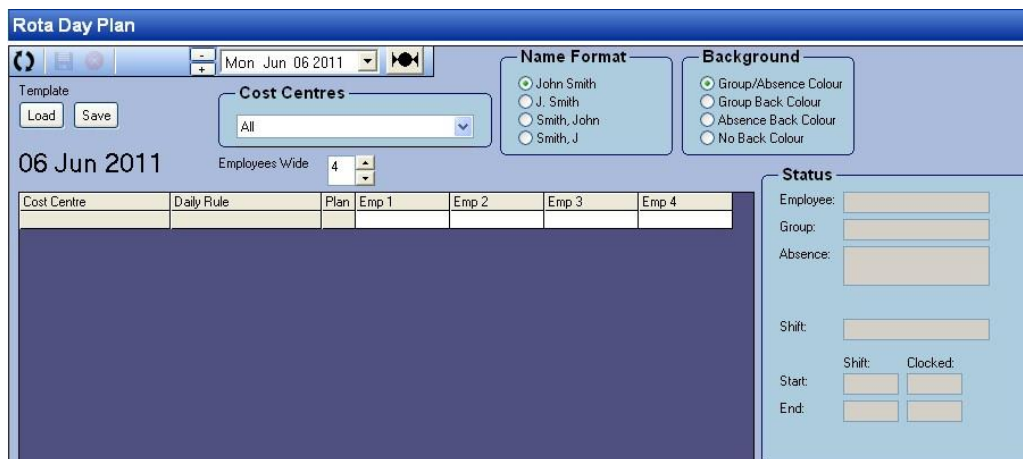
6.0 Using the Day Plan

6.1 Day Plan

Right click on the day header for the day you want to program and select 'Day Plan'.



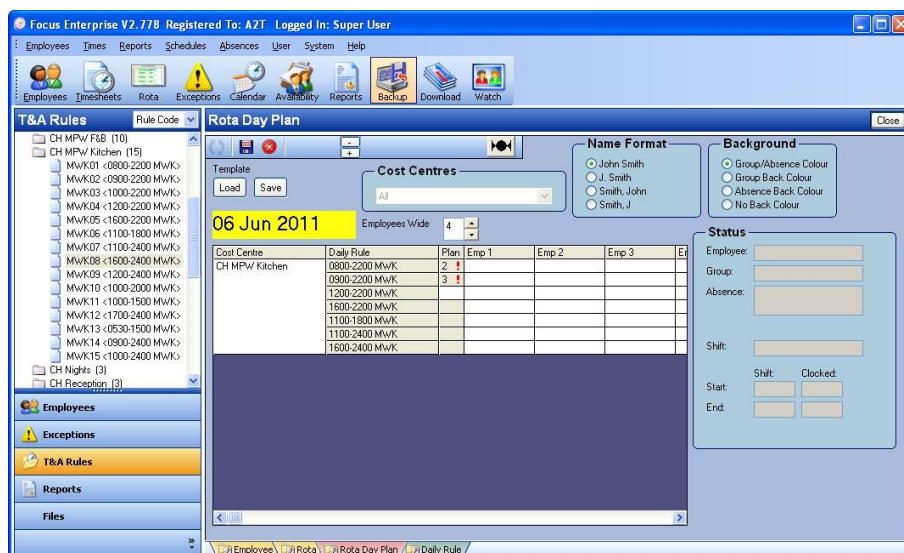
If you are using default work schedules then you will see the shifts that are programmed in for that day and the employees who are scheduled to work on them, if you don't have any default work schedules then you get this screen:



6.2 Adding Shifts to the Day Plan

You can drag shifts and employees on to the matrix to create your plan.

To add shifts click on T&A Rules on the bottom left and then drag and drop the shifts you want to be worked that day on to the matrix.



Using the Rota in Focus v1.7

Click in the 'Plan' column to enter the number of employees that you need for that day if you would like to. You get an exclamation mark if there are not enough employees allocated to the shift in question. You can have Skills listed here as well if required.

6.3 Saving a Day Plan Template

Once you have set up the day in question you can save this day as a template to be used again by clicking on the **Save** button.

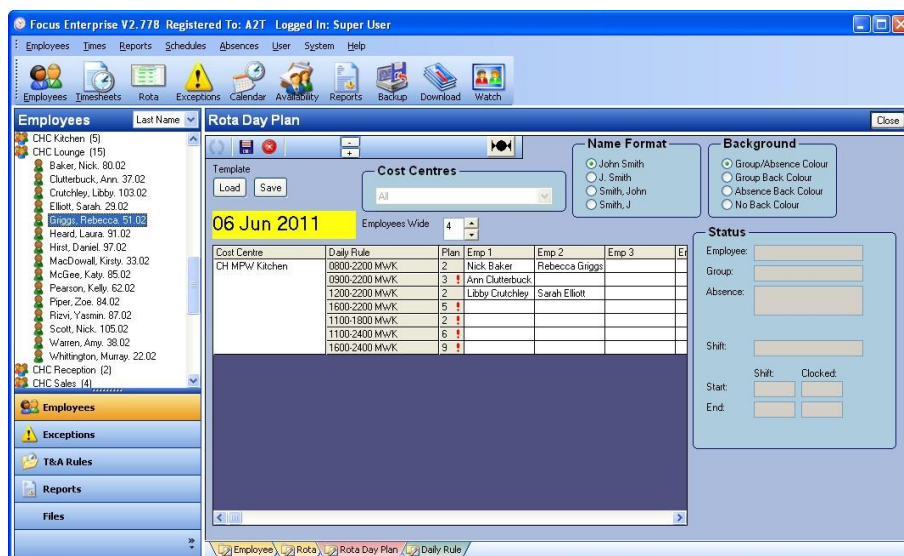
Here is the Save box, type in a name and click on Save:



You can then use the **Load** button to re-use your templates as often as you need to in the future without having to set them up again and again.

6.6 Adding Employees to a Day Plan

When you have created your plan you can the drag employees into the matrix from the list on the left (select employees first on the bottom left!)



You can right click on an employee and remove them. If this is meant to be for all weeks to follow then edit their work schedule if they have one!

6.7

Reviewing and Printing the Rota

Once you have created the Day Plan for each day of the week you can return to the Rota and check the costs for the days in question and you can print out the Rota or PDF it and email it to your staff.

06 Jun 2011					
Employees Wide 4					
Cost Centre	Daily Rule	Plan	Emp.1	Emp.2	Emp.3
CH MPW Kitchen	0800-2200 MWK	2	Nick Baker	Rebecca Griggs	
	0900-2200 MWK	3	Ann Clutterbuck		
	1200-2200 MWK	2	Libby Crutchley	Sarah Elliott	
	1200-2200 MWK	2			

Rota		
CHC Lounge		
	Mon 06 Jun	Tue 07 Jun
Nick Baker	0800-2200 MWK	
Ann Clutterbuck	0900-2200 MWK	
Libby Crutchley	1200-2200 MWK	
Sarah Elliott	1200-2200 MWK	
Rebecca Griggs	0800-2200 MWK	
Laura Heard		
Daniel Hirst		
Kirsty MacDowall		
Katy McGee		
Kelly Pearson		
Zoe Piper		
Yasmin Rizvi		
Nick Scott		
Amy Warren		
Murray Whittington		
Day Hours	58.30	
Day Cost	294.00	
Budget		

	Mon 06 Jun	Tue 07
Nick Baker	0800-2200 MWK	
Ann Clutterbuck	0900-2200 MWK	
Libby Crutchley	1200-2200 MWK	
Sarah Elliott	1200-2200 MWK	
Rebecca Griggs	0800-2200 MWK	
Laura Heard		
Daniel Hirst		

6.8 Version Control

1.7

Added Version Control

More detail on where to set up Daily Rules