

Driver Rota Manager User Guide

V3.5

Introduction

Welcome to the Drivers Rota software. This web-based application is designed to help you easily manage and schedule drivers, duties, and vehicles for a given week. The interface allows you to build daily schedules, assign tasks, track driver hours, and export or print your completed rotas.

1. Getting Started

Preparation

Before using this system for the first time it is a good idea to create a folder on your HD called /ROTA. This is where you can save and load various settings and Rota files.

When the system loads it will auto load any admin file it has on its system, this admin file will then populate the Rota grid with all of the pre-loaded data. When the user updates any information in the admin file, you will be prompted to save the file before closing the system.

At the top of the screen, you will find the Header Section. Here, you can configure the overarching details for the week.

Setting the Week and On-Call Details

Setting / Column	Description
Transport On Call Number	Enter the contact number for the on-call transport. The default value is "01443 622065".
Week Beginning	Use the date picker to select the Monday that starts your rota week. The system will automatically generate scheduling tables for all 7 days of that selected week.

Notices

Below the header is the Notice / Important Information box. You can enter any special instructions, warnings, or general notes for the week here. This notice will be included at the bottom of the page when you export or print the Rota.

Note from the developer: When entering duties, please separate them with a comma (,) instead of a dash (-).

2. Managing the Rota

The main area of the application displays a comprehensive table for each day of the week, from Monday to Sunday. Each row in a day's table represents a single driver's shift. To build your schedule, you will interact with several specific columns for each driver.

Setting / Column	Description
Name	The Names are auto populated from the admin list, click the dropdown will select a list of quick duties that can be added to the duty list with one click, things like Day Off, Sickness etc...
Duty	Click the input box to select or type a duty. Duties are categorised into sections such as Hospitals, Clinics, Samples, Yard Duties, Trailer Duties, Other Duties, and Misc. You can assign multiple duties to a single driver by separating them with a comma. If you type a duty that is not in the system, it will prompt you to add it to the Admin list.
Reg (Vehicle Registration)	You can allocate specific vehicles to drivers in the Admin File, these will then be pre-loaded. Selecting the vehicle registration dropdown will show available vehicles. Vehicles already allocated on the same day will be greyed out to prevent double-booking. If you attempt to select a vehicle that is already in use, the system will not allow you to do so.
Start / Finish Time	Select the shift times in 15-minute increments from the dropdown list. You can start typing to filter the time into the nearest hour.
Break	Select the break duration (e.g., 00:30). If a shift duration is 6 hours or longer, the system automatically assigns a 30-minute break.
Total Hours	The system automatically calculates the total worked hours by subtracting the Start Time and Break from the Finish Time. If the driver is allocated a FT (Full time) status in the admin file then a shift time of less than 6 hours after break will trigger the time warning system.

Navigating The Rota

There are a few ways you can navigate the system, the mouse is one obvious way to select the section you want, but you can use 'Smart Keys'

TAB: Can be used to advance the cursor to the next logical location, so from the duty input field to the Reg. field, then Start time and Finish time.

Return: The 'Return Key' can be used after each entry to end the current input.

Arrow Keys: In the dropdown menus you can use the up/down arrow keys to easily scroll through the menu and then use the 'ENTER' or 'RETURN' key to make the selection

Trailers and Duplicate Warnings

At the bottom of each daily table, there are dedicated rows for Trailer 1 and Trailer 2. These rows span across the table, allowing you to enter specific, wide-format notes or duties for the trailers without needing to fill out times or registrations.

To help prevent scheduling errors, the system actively monitors your inputs and highlights duplicate entries in light red. This occurs if the same duty is assigned to multiple drivers on the same day, it can be ignored by pressing 'Return' or 'TAB', the warning will return to normal colour.

3. Advanced Duty Features (Tokens)

When you enter multiple duties separated by commas, the system converts them into visual "tokens" or "chips". This makes it easy to read and manage complex shifts at a glance.

The 'Tokens' are all Drag & Drop, so once the token is created you can simply Drag and Drop it either in the same duty row or move it to a completely different driver.

To edit the text of the duties, you can Double-click any token, or single-click the background of the duty cell, to return to the standard text-editing mode.

Furthermore, you can right-click on any individual duty token to open a special context menu. The options available from this menu are described below.

Setting / Column	Description
Change Colour	Highlight specific duties by changing the token colour. Available colours include Default (blue), Green, Red, Amber, Blue, Purple, Teal, Pink, Orange, Grey, Dark Green, and Dark Red.
Toggle Strikethrough	Apply or remove a strikethrough effect on the duty text to indicate that it has been completed or cancelled.
Remove Segment	Delete that specific duty from the driver's list entirely.
Move to Driver	Move the selected token to another driver.

4. Admin Settings

Click the Admin button in the toolbar to manage the underlying data for your Rotas. This opens the Admin modal, where you can configure the master lists and view weekly reports.

Editing Lists and Reports

In the Admin modal, you can edit the master lists by typing one item per line in the provided text boxes. You can add or remove drivers in the "Edit Names" box, update vehicle registrations in the "Edit Reg." box, Update Driver+Reg allocations, update driver working status and manage tasks in

the "Edit Duties" box. You can also update duty start times to enhance the Consistency Logic. All of the changes made here will take effect in real time on the current Rota.

The Admin panel also provides valuable tracking information. The "Driver Hours" section displays a summary of the total hours worked by each driver across the entire week. The "Unused Duties by Day" section provides a daily checklist showing which duties have not yet been assigned, ensuring nothing is missed.

Saving Admin Data

Saving the Admin File will save directly to the server, so your file is updated and loaded automatically without you needing to worry. You can (and should) download a backup of this file to your HD/Rota directory.

4.1. Admin Settings Updates

Default Registrations

The system has been updated (17/06/26) to include a default reg. field for individual drivers. This means that you can save default vehicles for each driver which is then saved to the admin file. When the admin file is loaded the default vehicles will automatically be allocated on the Rota, this can still be edited on the 'Live' Rota grid.

Annual Leave & Sick Hours

The system now recognizes annual leave * Sick hours if they are inputted into the Rota duty list in the following format 'ANNUAL LEAVE (07.30HRS)' you can allocate any hours but it must be within the (). These hours will now be totaled up in the 'Drivers Hours' report.

5. Saving and Loading Rotas

When you click the 'Save Rota' button you will be prompted to select a save location on your HD, the system will then save the Rota under a dated file name (YYY-MM-DD) in that location. It will also save a Current_Rota.json file to the server for quick access. By pressing the 'Load Current Rota' button the current Rota will be speed loaded from the system.

NOTE# When you save the Rota it will automatically overwrite the server side current_rota, so make sure you have the backups on your HD to fall back on.

If you make any changes to the Rota, a yellow "⚠️Unsaved Changes To Rota" warning will appear at the top of the screen to protect against data loss.

6. Exporting and Printing

The toolbar provides several options to share your completed rota with drivers and management.

Setting / Column	Description
Export CSV	Downloads the Rota as a basic spreadsheet file (.csv) containing the raw schedule data.
Export Excel	Downloads a fully formatted Excel spreadsheet (.xlsx), complete with column colours, merged trailer rows, and the weekly notice.
Export PDF / Print	Click Print to open your browser's print dialog. The system reformats the page specifically for printing, hiding dropdown buttons and rendering tokens correctly. Click Export PDF to do the same; simply choose "Save as PDF" as your printer destination.
Email Rota	Prepares the print view and then automatically opens your default email client (e.g., Outlook) with a pre-filled subject line, so you can attach your saved PDF.
Print Hours Report	Found inside the Admin menu. Prints a formatted summary of total driver hours for the week.
Print Duty List	Found inside the Admin menu. Prints a daily checklist showing assigned and unassigned duties.
Send Rota *	If you are using the advanced Rota System then the 'Send' button will send the finished Rota to the Rota App, each Send will update the App with the current Rota.

*Only available in 'Pro_Driver_Rota_Manager'