

Office Staff Scheduler

User Guide v1.0

Introduction

Welcome to the Office Staff Scheduler (part of WorkforceOS). This complete workforce management tool simplifies the process of planning weekly rotas across office departments. It provides a clear grid to manage who works in-office, remotely, or is off each day, whilst handling holiday requests and tracking attendance in real time.

1. Getting Started

The Weekly Rota Tab

The Weekly Rota tab is your main dashboard for planning the week. It displays a grid where you can assign statuses to employees from Monday through Friday.

Before assigning shifts, you must select the specific **Week** you wish to plan for. You can use the **Department** dropdown menu to filter the view (e.g., HR, Finance, Operations) or choose to view all departments simultaneously.

Managing Categories

The system allows you to define the specific working statuses available for assignment. By clicking **Manage Categories**, you can create statuses such as 'In Office', 'Working from Home', or 'Site Visit'. These categories can be colour-coded to provide easy visual identification on the rota grid.

2. Managing the Rota

The core function of the application is assigning and managing employee statuses across the working week.

Setting / Action	Description
Status Assignment	For each employee row, assign their working status for each day (Monday through Friday) using the categories you have defined.
Auto-Assign	Click this button to automatically fill the rota based on the default working patterns set for your staff. This feature saves significant time by preventing the need to enter standard weeks manually.
New Rota	Click this button to clear the current grid entirely, allowing you to start fresh for the selected week.

3. Holiday Management

The **Holidays Tab** is a dedicated area for managing all employee time off. It integrates directly with the main rota to prevent scheduling conflicts.

Feature	Description
Dashboard Overview	View Pending Approvals, Upcoming Approved holidays, and Total Logged holidays at a glance.
New Request	Click the + New Request button to log a holiday for an employee.
Approval Workflow	Review the list of pending requests to approve or deny them. When a holiday is approved, the system automatically blocks out those specific days on the Weekly Rota, ensuring the employee cannot be scheduled.

4. Saving and Loading Rotas

Once you have finalised the schedule for the week, you must save your work to ensure it is retained and visible to the team.

Action	Description
Save Rota	Click this button to commit the schedule to the database. This action makes the finalised rota visible to staff members who have viewing access.
Load Rota	Use this function to pull up previously saved weeks for reference, auditing, or further editing.