

Office Staff Scheduler User Guide

Introduction

The Office Staff Scheduler (part of WorkforceOS) simplifies the process of planning weekly rotas across departments. It allows you to manage who works in-office, remotely, or is off each day, whilst handling holiday requests and tracking attendance in real time.

Key Features

- **Drag-and-Drop Planner:** Easily assign shifts and locations across the week.
- **Holiday Management:** Track and approve absence requests in one centralized location.
- **Multi-Department Support:** Filter and manage staff by their specific departments.
- **Auto-Assign:** Quickly populate rotas based on standard working patterns.

Getting Started

1. The Weekly Rota Tab

This is your main dashboard for planning the week.

- Select the **Week** you wish to plan for.
- Use the **Department** dropdown to filter the view (e.g., HR, Finance, Operations) or view All Departments.
- For each employee, assign their status for Monday through Friday (e.g., Office, Remote, Off).

2. Managing Categories

Click **Manage Categories** to define the statuses you can assign to staff (e.g., 'In Office', 'Working from Home', 'Site Visit'). You can color-code these for easy visual identification on the grid.

3. Auto-Assign and Reset

- **Auto-Assign:** Click this to automatically fill the rota based on the default working patterns set for your staff, saving you from entering standard weeks manually.

- **New Rota:** Clears the current grid to start fresh.

4. Holidays Tab

Navigate to the **Holidays** tab to manage time off.

- View **Pending Approvals**, **Upcoming Approved**, and **Total Logged** holidays at a glance.
- Click **+ New Request** to log a holiday for an employee.
- Review the list of requests to approve or deny them. Approved holidays will automatically block out those days on the Weekly Rota.

5. Saving the Rota

Once you have finalized the schedule for the week, ensure you click **Save Rota**. This commits the schedule to the database and makes it visible to staff (if they have viewing access). Use **Load Rota** to pull up previously saved weeks for reference or editing.