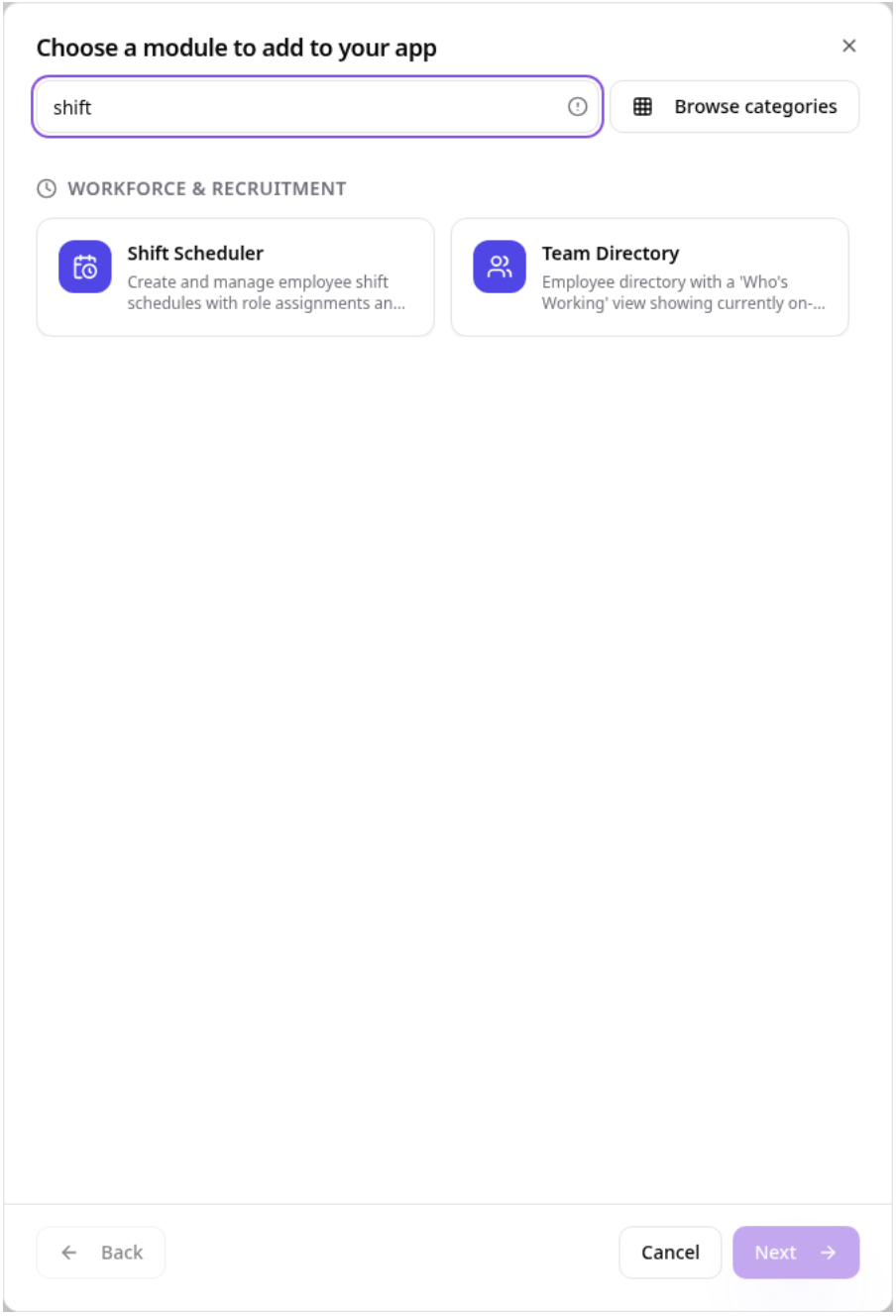
Plan staff rotas with Shift Scheduler

1. Choose Shift Scheduler

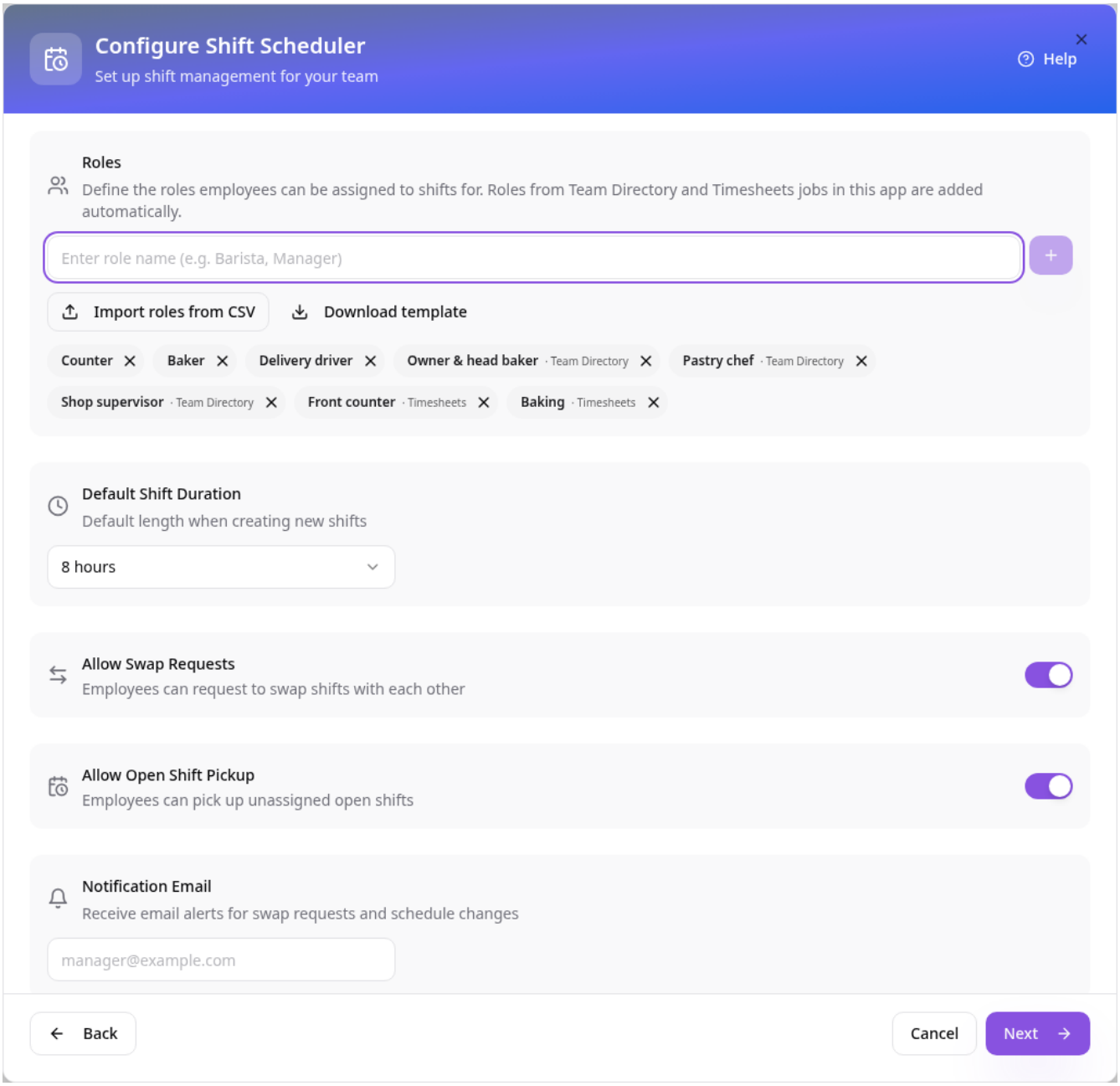
In Pages, tap Add Page or Function, search “shift” and tap Shift Scheduler.



Plan staff rotas with Shift Scheduler

2. Add your roles

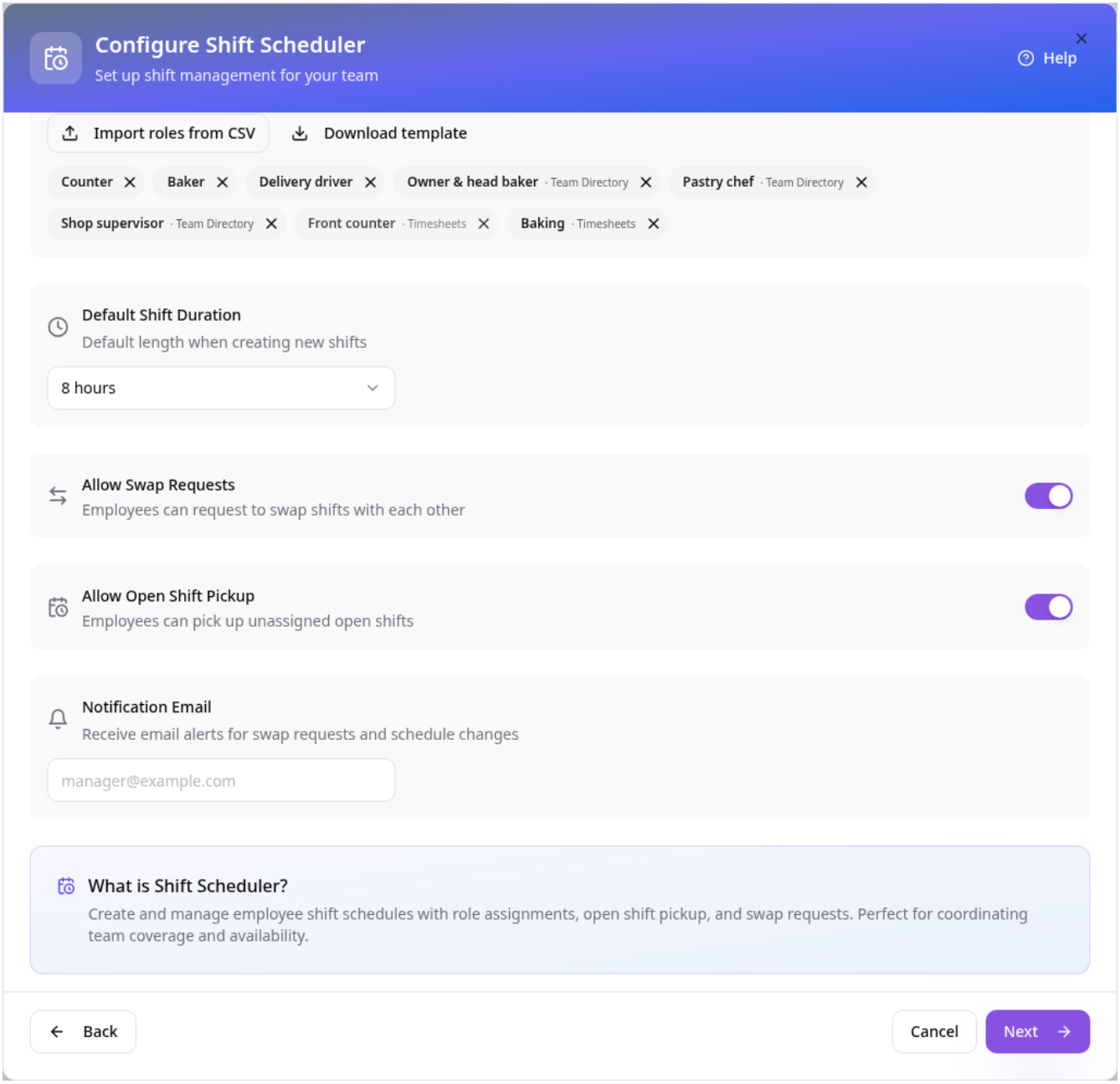
Type a role and press Enter, or import roles from a CSV (tap Download template for the format). Roles from Team Directory and Timesheets in the same app are added automatically.



Plan staff rotas with Shift Scheduler

3. Choose your options

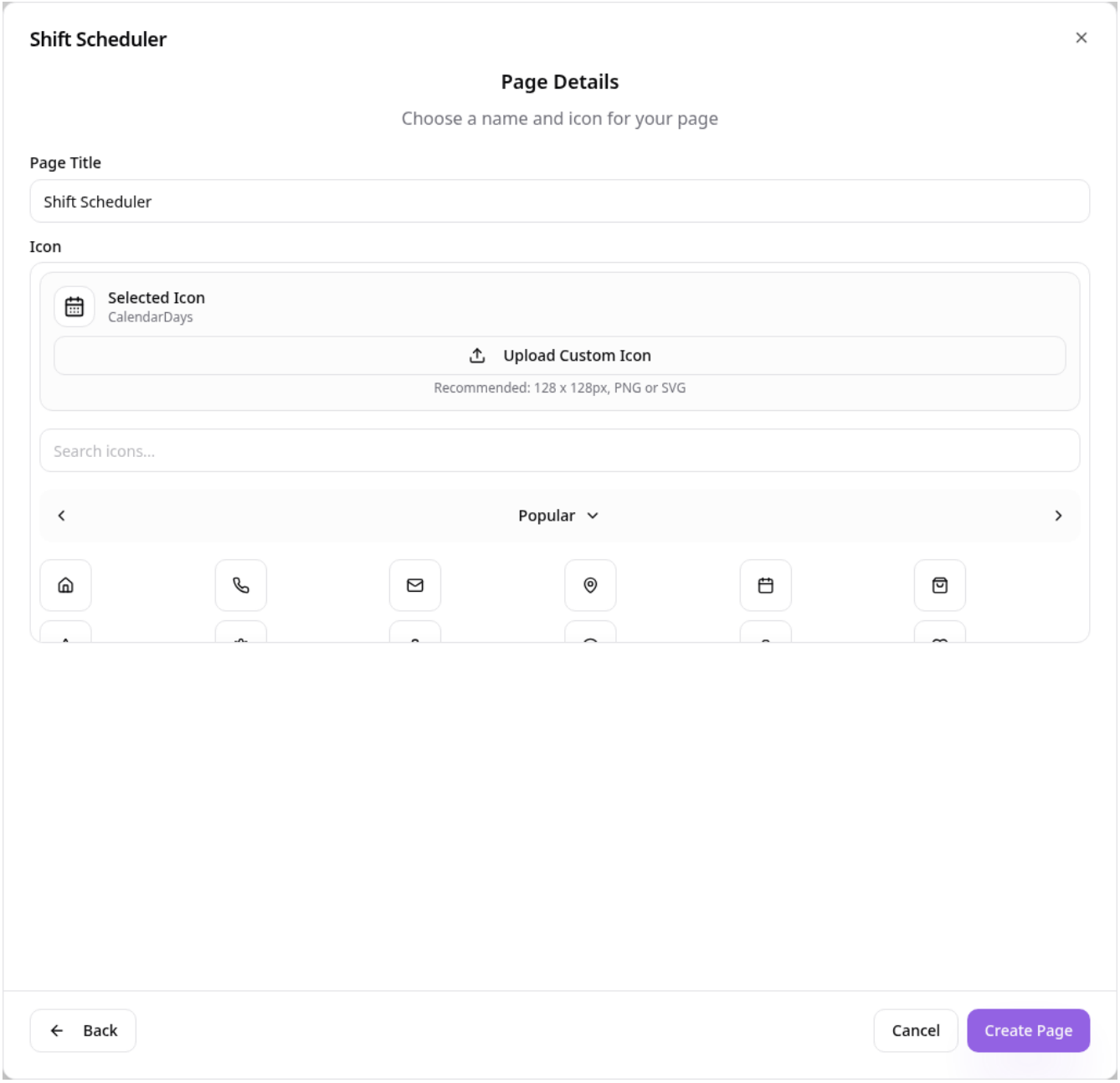
Set the default shift length, allow swap requests and open-shift pickup, and add an email for swap alerts.



Plan staff rotas with Shift Scheduler

4. Name the page

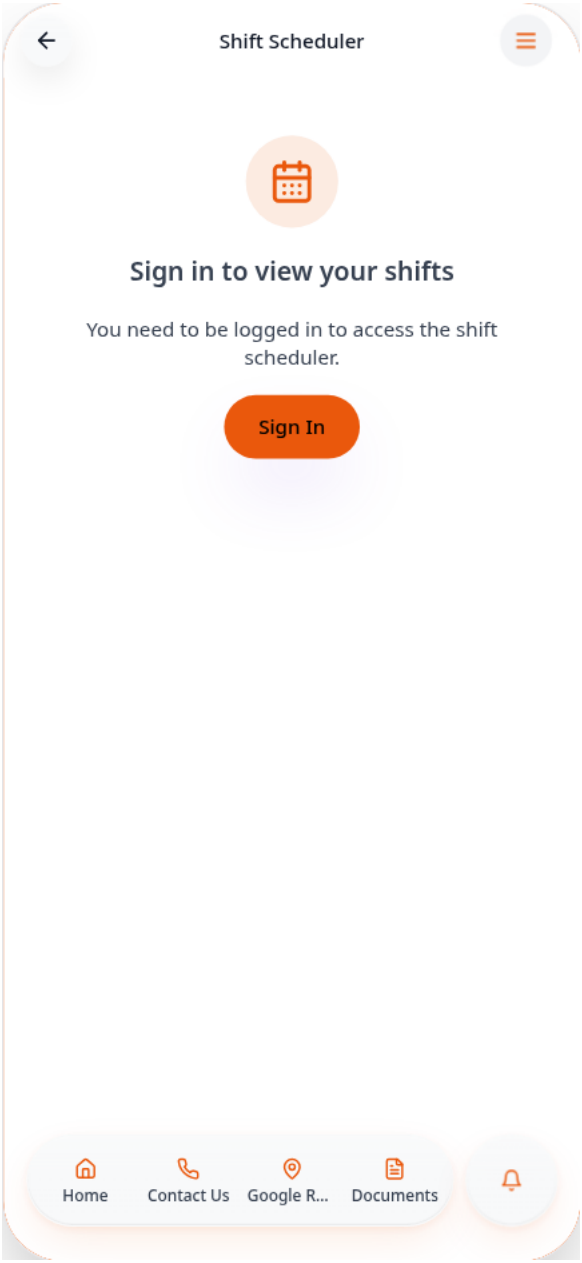
Tap Next, choose a page name and icon, then tap Create Page.



Plan staff rotas with Shift Scheduler

5. Staff sign in

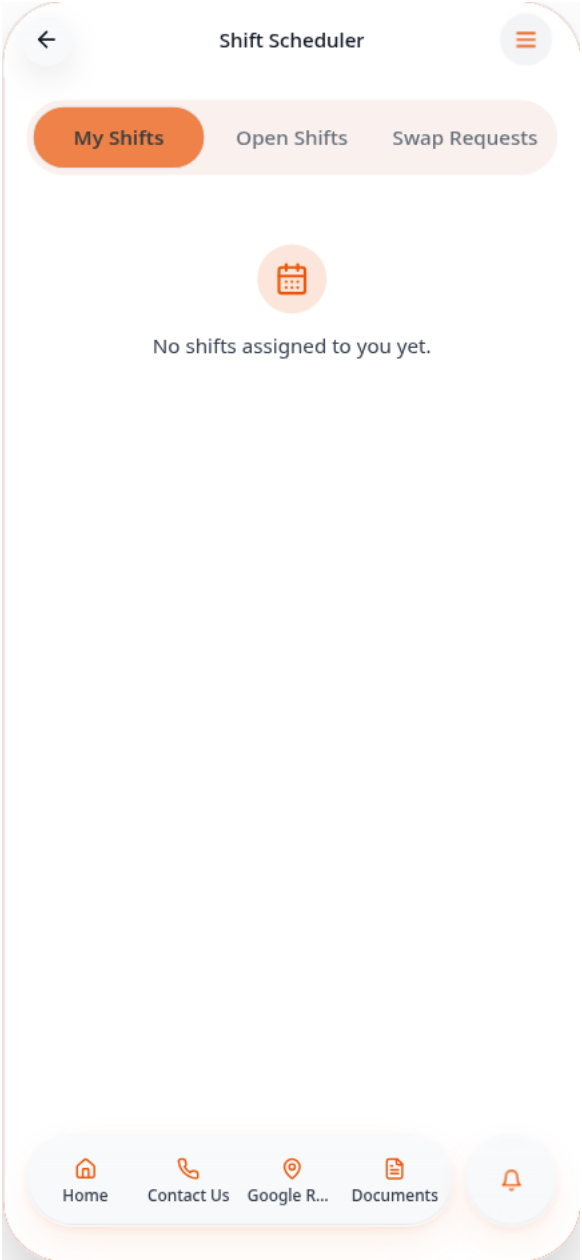
Shifts are private, so staff sign in or create an account in your app. Once they sign up they can be given shifts.



Plan staff rotas with Shift Scheduler

6. Ready for shifts

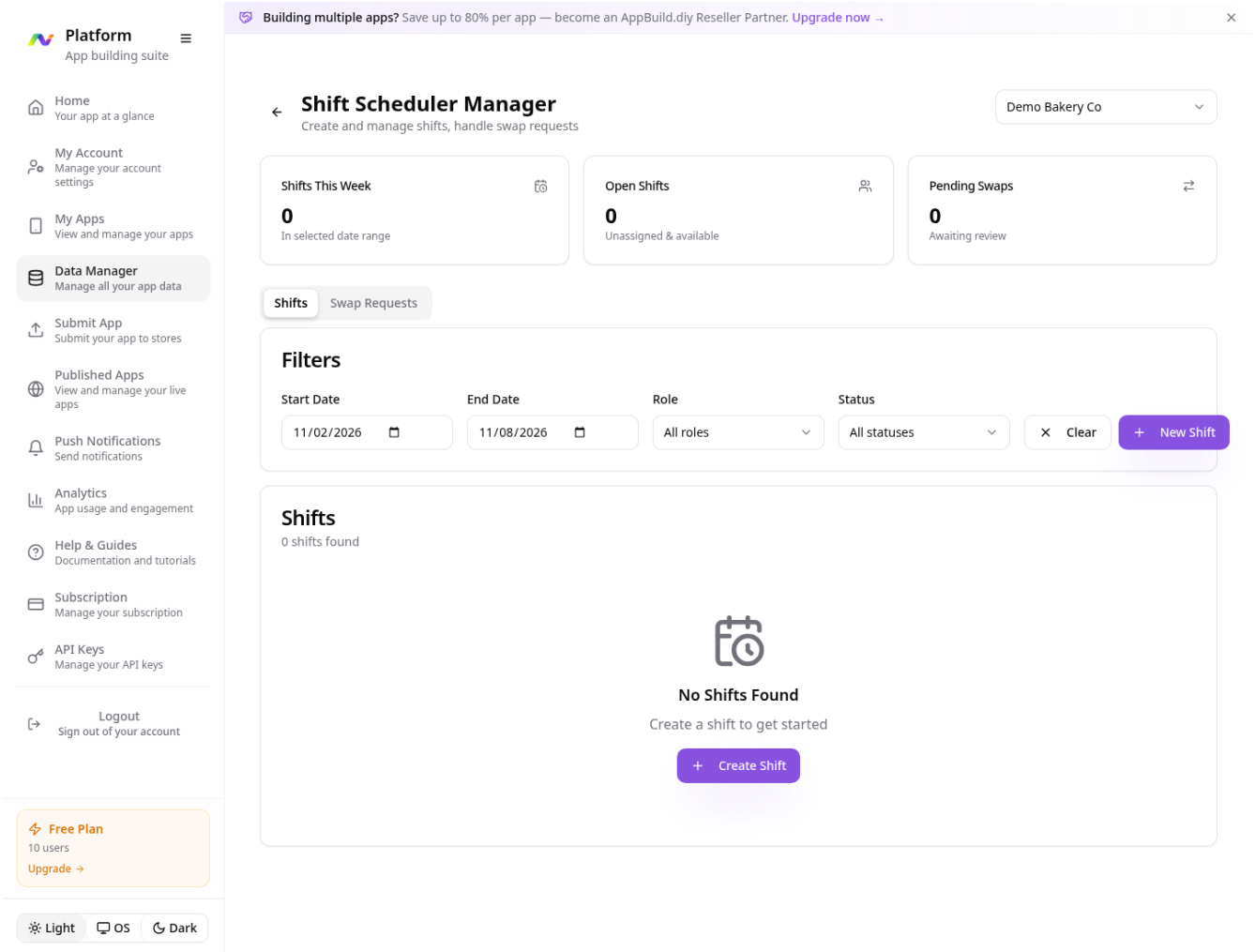
Signed-in staff see My Shifts, Open Shifts and Swap Requests.



Plan staff rotas with Shift Scheduler

7. Open Data Manager

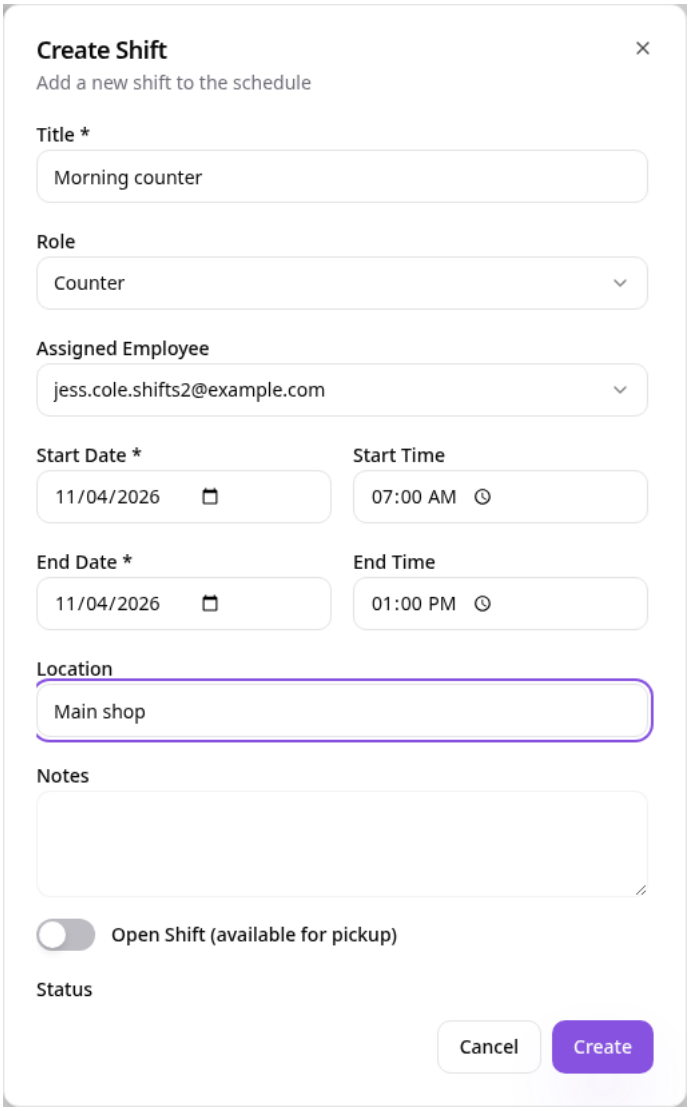
In Data Manager, open Shift Scheduler and tap Create Shift.



Plan staff rotas with Shift Scheduler

8. Create a shift

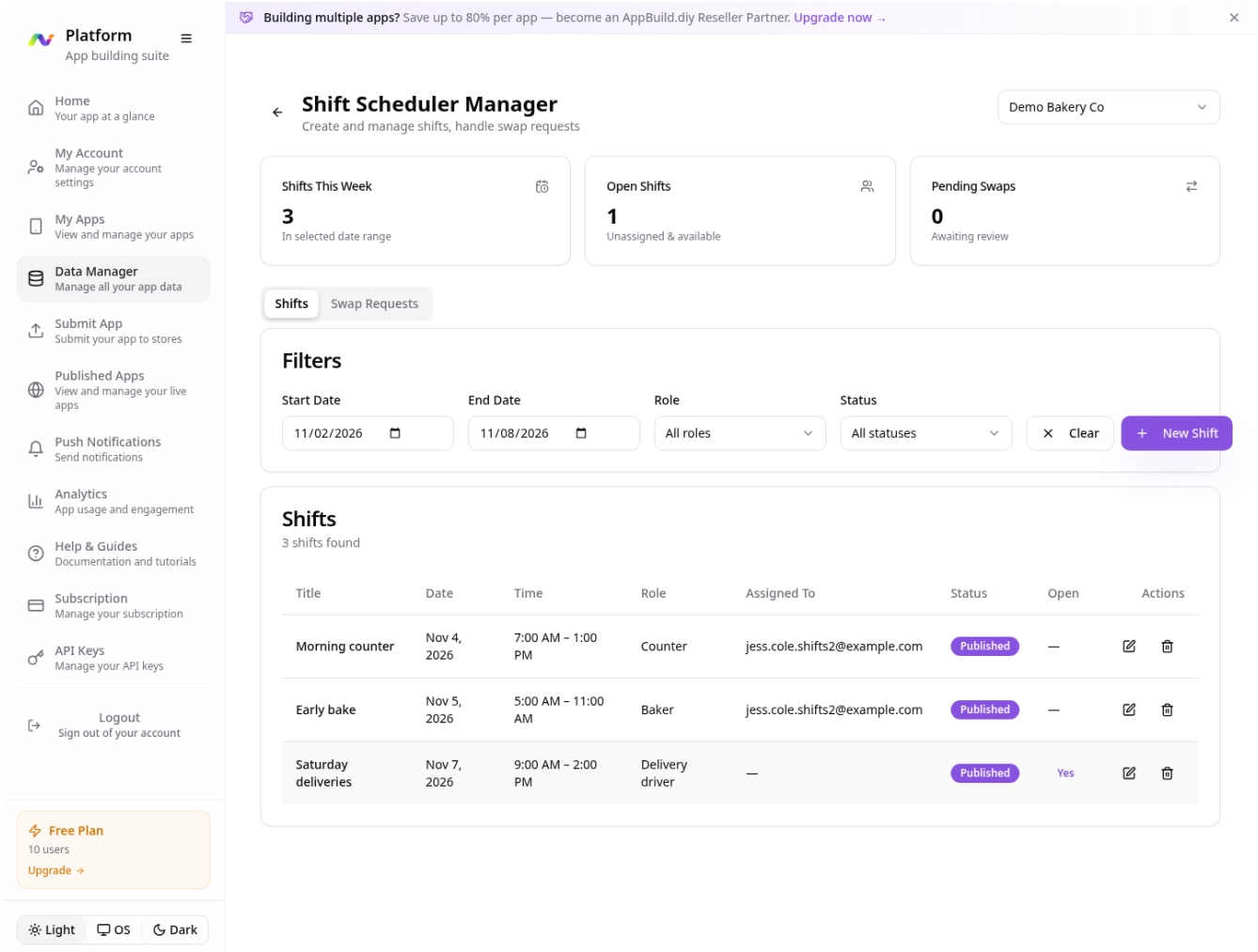
Add a title and role, choose the employee from your registered app users, then set the dates, times and location. Tap Create.



Plan staff rotas with Shift Scheduler

9. Build the rota

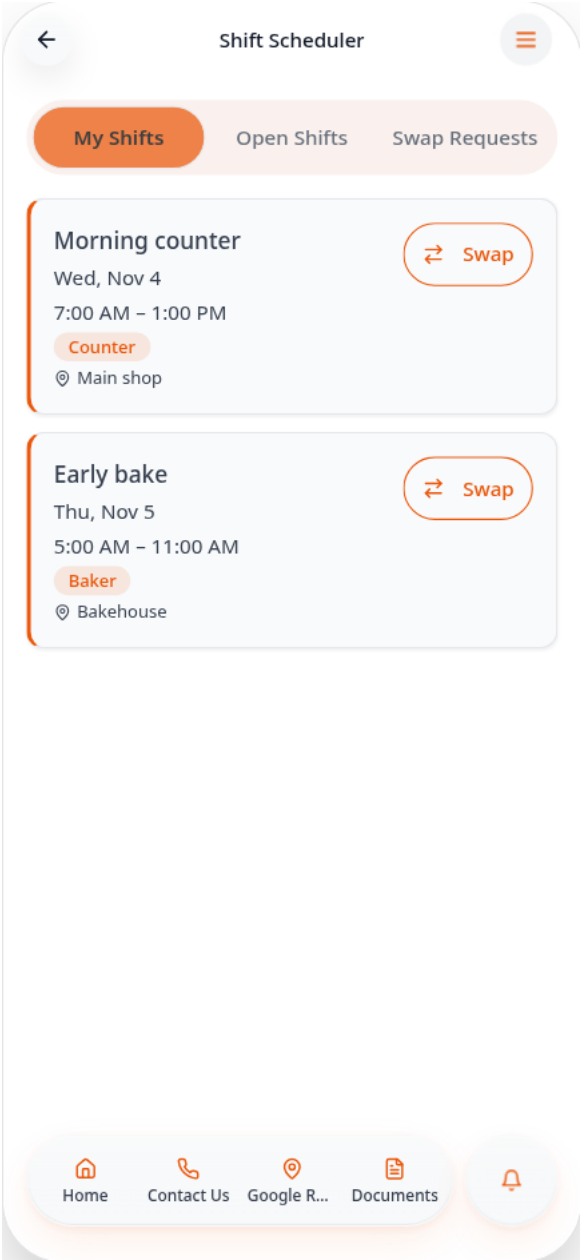
Add more shifts. Leave a shift unassigned and turn on Open Shift to let anyone pick it up.



Plan staff rotas with Shift Scheduler

10. Staff see their shifts

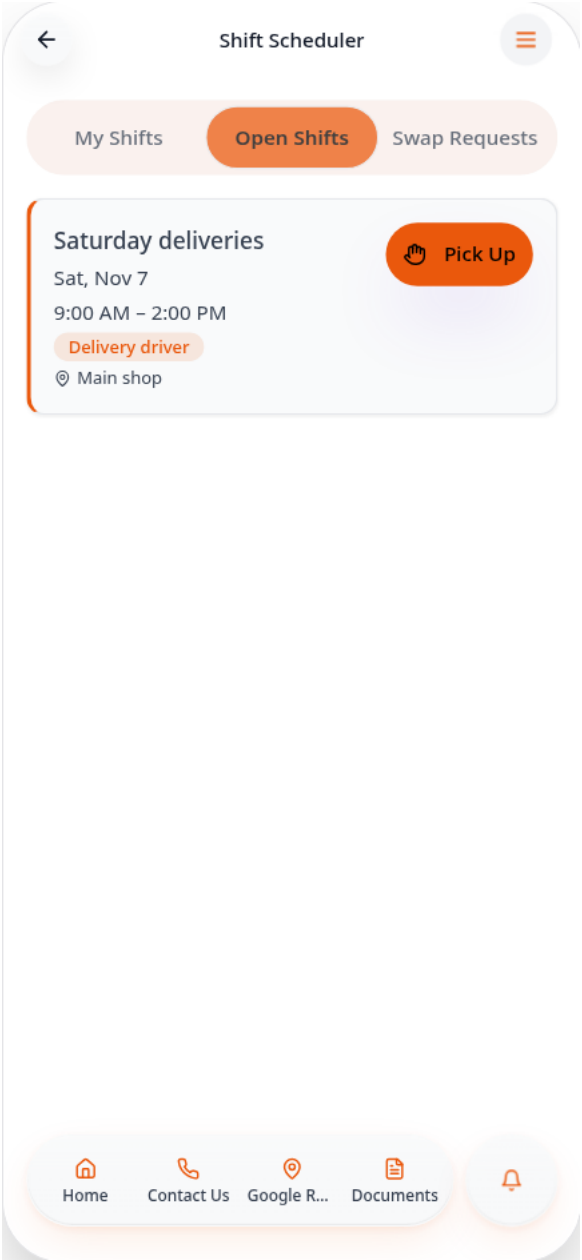
My Shifts lists each person's upcoming shifts. Tap Swap to ask to swap one.



Plan staff rotas with Shift Scheduler

11. Pick up open shifts

Open Shifts shows unassigned shifts. Tap Pick Up to take one.



Manage shifts and approve swap requests any time in Data Manager → Shift Scheduler.