

Time to thrive:

a guide to rotas
and timesheets



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IRIS

In our working lives,
it's easy to take rotas and
timesheets for granted...
until something goes wrong.



Introduction

**Rotas and timesheets are an essential part of daily business life.
Or nightly, depending on the shift.**

From retail to hospitality, healthcare to engineering, companies worldwide use them to plan and monitor the work of billions across the globe.

But, as we have seen, execution is everything. A mediocre system based on paper or spreadsheets can end up causing big problems. Working with such tools can also sap time. Managers can spend too many hours creating, sharing and editing schedules.

SCENARIO

A rota nightmare

The queue began to wrap between the stands of the shop floor. Irritated customers checked the time on their phones and watches.

Nobody was serving them.

It was Saturday morning and the first day of the sales, but not enough people were on the tills.

Late last night, the supervisor called the floor manager; the stock take had overrun. There was no way she would have been able to get home, sleep and get up again in time for work. Even if she had, it would not have been allowed by law.

Two staff holidays were signed off without realising they clashed with the sales kick-off, and the most reliable person in the department was off sick. They had been for days, but nobody made a note to check when they might be back.

SCENARIO

A timesheet catastrophe

The firm had enjoyed a stellar reputation in manufacturing for more than five decades, but repeated mistakes had led to staff complaints about overwork - and those complaints had turned into action.

Staff had realised they consistently worked more than 48 hours a week, the averaged-out time allowed in the UK.

Unionised, they brought the business around the negotiating table, with ACAS in between them. There's an apparent willingness to work things out, but there's a long road ahead.

And it has led to new problems: no one knows how the press was tipped off, but the headlines ensure nobody will apply to work at the business anytime soon.

Timesheets and rotas in a nutshell

In brief, a rota is a plan of who will work on a particular day and time. They are used by any business that goes outside of a set pattern - such as the typical 9-5.

A timesheet documents the hours someone has worked and is often completed on either side of a shift. One old way was for staff to "punch in" and "punch out" using a piece of card and a machine. These days, you're more likely to put your thumb to a biometric reader or swipe a card against a panel than use anything mechanical. Timesheets are often used when businesses risk exceeding the 48-hour working week limit.

The cost of getting timesheets and rotas wrong

We saw with our example that if you make a mistake on a rota, you can end up with the wrong number of people on your shift. That scenario resulted in understaffing, but you could just as easily have too many people on the floor or in the office. It means hours wasted chasing the problem and hassled, bored or demoralised staff.

By spending so much time chasing inefficiencies, managers take on an admin role:

- They are tracking dates and times.
- They are checking who has worked too many hours and has outstanding holidays.
- They are thumbing through contracts or trying to patch gaps in the schedule by contacting zero-hours team members.

And they are doing all this instead of encouraging workers and strategically growing the business.

Mixing up rotas and timesheets means you might not comply with the law. You can mistakenly put someone on a late pattern, have the wrong length breaks or not give them the correct number of uninterrupted rest days.

None of which is good for morale. As we saw with the manufacturer in our second scenario, you can find yourself desperately trying to avoid union action. Even if you do, a sit-down with ACAS can mean bad press.

Beyond the example, poor tracking on timesheets can mean people will not get paid, and your business will get a skewed understanding of how much staffing they need. Worse, if they work too many hours of unpaid overtime, it could drag their hourly pay below the Minimum and Living Wage thresholds set by the UK Government.

What does a rota look like?

Rotas are used throughout the world. They are also called schedules (not to be confused with this term's use in project management) or rosters.

No two rotas will look quite the same, but most have several things in common.

They list each employee and add information about them, including their location or department. They tend to be based on a grid format - if it's a daily schedule, it will run top to bottom. A weekly schedule goes from left to right.

Ultimately, they keep shop floors, bars, and other areas organised and populated.

A manager generally oversees rotas, but sometimes, an HR department will run it.

How modern rotas work

Modern rotas are created with software. This often uses a centralised hub so managers can inform staff of shift changes and updates using one reliable data source. Good cloud-powered software will incorporate secured apps so people can quickly check their hours, make requests and see where they are meant to be daily or weekly.



What does a timesheet look like?

We've talked about how people no longer punch in or punch out using mechanical devices - but beyond that, how does it work?

The electronic system your business uses will be backed by time-tacking software.

Timesheets can now be sent using a solution that sends the information from a clock-in system to managers. This keeps a keen eye on excessive hours while also ensuring that people are paid for what they do and that nothing is missed, like overtime or weekends.

That means a double win for compliance.

Important things to know when scheduling staff

How night shifts work

Night shifts are precisely measured in the UK.

The night period runs from 11pm to 6am, and someone is classed as a night worker if they regularly work three hours during this night period.

Night shifts are seven hours long and include 12am to 5am.

There are limits. Night workers should not work more than an average of 8 hours in every 24; this average is often calculated over 17 weeks unless agreed otherwise.

People can say they don't want to work night hours and must not be discriminated against for doing so.

Minimum leave

When setting out rotas for full-time workers, you must give them 28 days a year (5.6 weeks) of **annual leave**.

This rule is for people covered by the Working Time Regulations 1998, including agency workers.

Bank or public holidays such as Christmas can be counted to this total.

Breaks

There are three types of break:

- Worktime breaks if staff are there for more than six hours (20 mins)
- Daily rest (11 hours between 'working days')
- Weekly rest (24 hours uninterrupted every week. There should also be 48 hours without disturbance each fortnight)

Zero hours contracts

A zero-hours contract is entered into without any guarantee of work hours. When work arises, the individual can choose to accept the work offered or not.

The worker must be paid at least the National Minimum Wage.

However, this is considered distinct from self-employed people, who might agree to zero hours with regular clients.

Flexible working

Flexible working is there to help people juggle that all-important work-life balance.

Such flexible working is for everyone, the UK Government says, not just for parents and carers. After working 26 weeks for an employer, anyone can request flexible working.

As an employer, you must be reasonable. This can mean looking at the advantages and disadvantages of the worker's application, having a meeting to discuss it and offering them a right to appeal if the decision doesn't go their way.

Hybrid working

Overall, the **CIPD says** 83% of organisations have made hybrid working a part of their operations. It adds that 45% have a formal policy, and 13% are developing one.

Many businesses opt for three days at home and two in the office or vice-versa.

Home working

The **CIPD has drawn attention to** many people wanting to work from home (with 46% of businesses telling them this interest has increased). One in five firms admit they struggle to cater for this.

A word of caution

If you use time tracking, the **CIPD** warns there is a danger of presenteeism - with people coming into work when they are not well. This approach can also lead to measuring output as quantity rather than quality.

FAQ - Maintaining a rota or setting up timesheets? This is what you should ask yourself.

Q: Is my existing rota or schedule up to scratch?

Check it has the space and flexibility to put people on shift for the exact times you need them. A significant sign it's not compatible is if you have to use workarounds (or, on paper, write around the edges) to add people to the time you need them.

Q: What demand is being placed on staff time?

Are your staff always busy, or are there moments when they are left twiddling their thumbs (and, worse, demotivated)? Is there a better use of their time? Can you move their hours or duties around to deploy them more effectively?

Q: What policies do I have?

Everything from the number of holidays people have to the total hours they are contracted for needs to be properly captured by the rota. Either make sure you're always mindful of your policies, or - and this is far better - if you have software, ensure it's all automated.

Q: What has gone wrong previously?

There are several warning signals you need a better system. With rotas, there can be too many people on the floor or too few staff when things get busy. With timesheets, it's about tracking the appropriate work hours to ensure they don't exceed an average of 48 a week. If people complain about this not being the case, you should check that your systems are on point.

Q: Who has been underpaid or overpaid?

Regarding timesheets, this is a dead giveaway that your system doesn't work. Perhaps details are being missed by payroll, or they are being sent in duplicate... or maybe the staff completing their timesheet duties are making mistakes because the system isn't clear. Software usually fixes this issue by creating a central database from which everything can be tracked.

Adding a new rota or timesheet system? Consider implementing it gradually, one department at a time. This will allow you to test the idea and create internal advocates who will share how great the new system is and encourage future adoption.

If you are picking software for rotas and timesheets, remember that good software deskills things - life should be easier and not involve yet more complex procedures.

Know your policies, standards and what you are trying to achieve. That way, when shopping around for software, you will see which will best meet your needs.

Timesheets and rotas should ultimately be a single source of truth. Staff should be able to log in, and anything they add or change should be reflected throughout the organisation.



Taking rotas and timesheets to the next level

Ideally, you want your rota and timekeeping software to link with your HR systems. This means your schedules and timesheets become part of workforce planning.

This allows you to create a system that delivers on objectives, is built around good data, and provides the foresight to spot issues.

But how can you do this?

IRIS Cascade HRi

IRIS Cascade HRi is a powerful, integrated system that lets you manage HR and payroll processes in a medium or large business.

It's designed to help companies manage the whole employee experience, from onboarding to offboarding. IRIS Cascade handles everything from annual leave, payroll, recruitment and training to well-being and talent management.

The customisable system enables employees to self-serve, and it is built on three decades of experience - delivering unparalleled reporting, real-time data, and error-proof HR and payroll.

[Book a demo now](#)

What customers say

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We've been very happy with adopting IRIS Cascade because it's enabled us to become more efficient and focus on higher value HR activities. Overall, it saves lots of time and provides transparency and clarity of information. You can see your team in a snapshot - it's really visual. It gave us a really powerful tool for managers. It gives me the ability to quickly report on it, and it's at my fingertips."

Kate Gledhill, Acorn Stairlifts, HR Manager

Rotageek

IRIS Cascade HRi links to Rotageek's outstanding scheduling, time and attendance, and leave and absence tools. The result? Managing your workforce is seamless and feels stress-free.

Rotageek instantly verifies HR benefits (like outstanding leave or eligibility for certain shifts), attaches them to each employee, and reflects these in schedule creations.

HR data for joiners, changers and leavers is added in IRIS Cascade HRi. This is then pushed into Rotageek without the need for re-keying.

Timesheets are audited and approved in Rotageek and sent to IRIS payroll.

Leave and absence can be managed in either solution as preferred and sent through to the other.

[Find out more](#)