



Shift Manager Guide

The Shifts board — creating, repeating and editing shift schedules

Analytical Engines Ltd.		HR > SHIFTS		Jump to...		All offices		EN		13:45:00		THU	
SCHEDULE · 06 JUL-12 JUL · 7 DAYS · 5 ROWS		Shifts		Organisation		My shifts							
RANGE		Day		Week		2 weeks		Month		< Today >		ZOOM	
USER · OFFICE		WED 06 JUL		THU 07 JUL		FRI 08 JUL		SAT 09 JUL		SUN 10 JUL		MON 11 JUL	
MF	Michael Faraday LONDON HQ · RESEARCH SCIENTI..	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00
IN	Isaac Newton LONDON HQ · RESEARCH FELLOW	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	14:00-20:00
MD	Mary Somerville LONDON HQ · RESEARCH FELLOW	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00
CD	Charles Darwin LONDON HQ · NATURALIST	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00
FN	Florence Nightingale LONDON HQ · OPERATIONS MANAG.	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00	09:00-18:00

5 ROWS · 5 TOTAL

SOURCE · SHIFT SCHEDULE

For users with the **Shift manager** role. It builds on the Employee Web Guide — everything there applies to you too.

Applies to HR.Click Web · Document v1.0 · August 2026

Scheduling shifts

1 Your role in two minutes

As a **shift manager** your sidebar card reads **SHIFT MGR**, and you get one extra page on top of the regular employee ones: **Shifts**.

SCOPED TO SHIFT-SCHEDULED PEOPLE ONLY

You can only create, edit or cancel shifts for employees whose **schedule type** is set to *Shift* — office-schedule employees are entirely out of scope for this role, even if you outrank them elsewhere. That setting itself lives on the person's profile in **Users**, a page this role does not open — an admin, time manager or vacation manager is the one who puts someone on a shift schedule in the first place. You just work with whoever already carries it.

Two things this role deliberately does **not** give you, despite the name overlap with time tracking:

- No **Approvals** queue and no editing rights in the time-report day drawer — that stays with the **Time manager** role.
- No **Users** or **Organization** directories.

What you do keep, beyond **Shifts** itself: **Following** (scoped to shift-scheduled colleagues) and a read-focused slice of **Time report** — both covered in section 7.

THE SHIFTS PAGE CAN BE INVISIBLE

The sidebar only shows **Shifts** once the organisation actually has at least one shift-scheduled employee. On a company that runs entirely on office hours, a shift manager's sidebar looks identical to a plain employee's.

2 The Shifts board

Shifts opens on the **Organisation** tab — the full schedule for everyone on a shift schedule. A **My shifts** tab sits next to it for your own agenda, in case you are shift-scheduled yourself.

- **Range** — **Day** / **Week** / **2 weeks** / **Month**, with prev/next arrows and a **Today** shortcut.
- **Zoom** (desktop only) — widens or narrows the day columns without changing the range.
- **Office** and **Team** filters — the office filter only appears once the company has more than one office; the team filter only once teams exist.
- **Export** — downloads the visible range as XLSX.
- **New shift** — opens a blank shift drawer (section 4).

Below 768px width the board switches to a per-person card list instead of a grid — the same information, stacked for a phone screen.

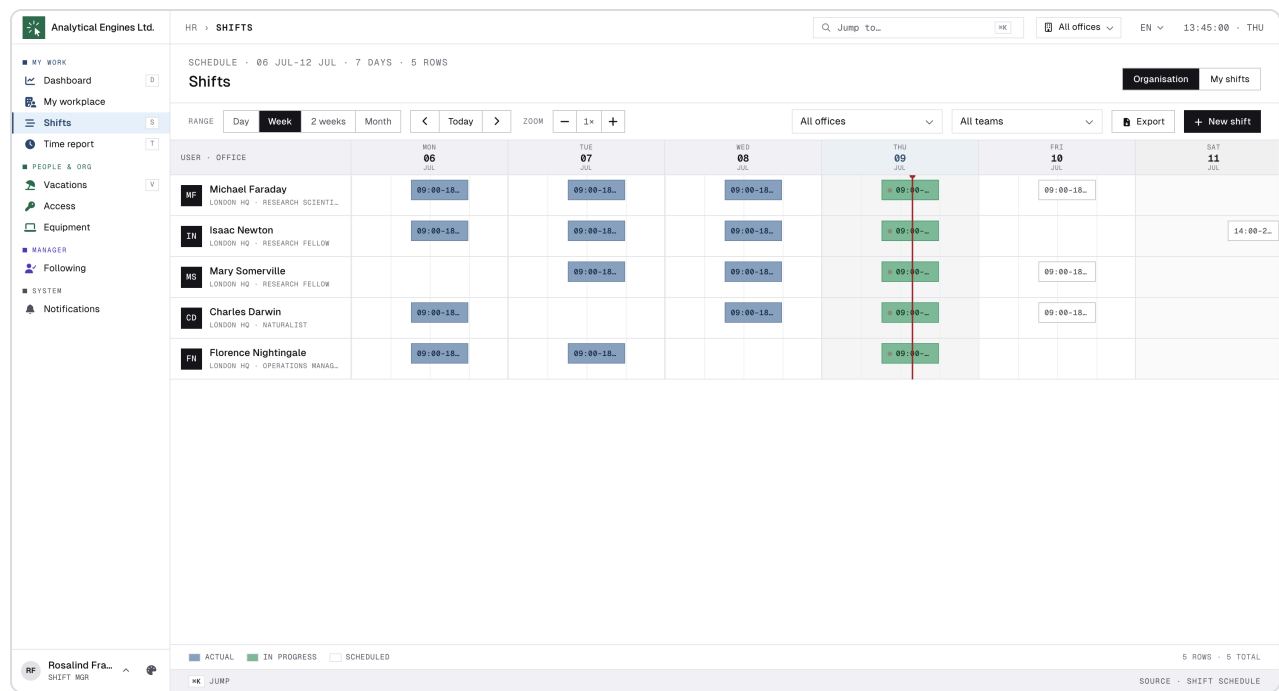


Figure 1 — The Organisation board — one row per shift-scheduled employee.

3 The Gantt

Each row is a person, each block a shift; a vertical line marks the current time. Two ways in:

- **Click an existing block** to open it in the edit drawer (section 6).
- **Click an empty spot on someone’s track** to open a new shift already pre-filled with that person and that time.

The legend below the board only lists the kinds actually present in the visible range, drawn from the same palette as the block colours: **Actual**, **In progress**, **Scheduled**, **Short day**, **Cancelled**, **Lost**, **Vacation**, **Unpaid**, **Sick**, **On call**, **Training**, **Remote** — leave and sick time ride on the same board so a gap in the roster is never a mystery. The strip under the legend totals rows and people for the current filter.

4 Creating a shift

New shift (or a click on an empty gantt track) opens the drawer with these fields:

- **Employee** — a searchable dropdown listing shift-scheduled people only.
- **Office** (optional).
- **Kind** — *Regular*, *On call*, *Training* or *Remote*; each gets its own colour on the board.
- **From date / From time**, and — for a one-off shift — **To date / To time**.
- **Shift with a break** — an unpaid break inside the window, and what an unpunched one costs.
Section 5.

An inline notice reminds you that times are entered **office-local wall clock** but stored as UTC underneath, so a shift always displays in whoever is looking at it's own local time.

NEW SHIFT DRAFT

EMPLOYEE
Michael Faraday

Only employees on a shift schedule are listed.

OFFICE (OPTIONAL)
London HQ

KIND
Regular

On-call, training and remote shifts get their own colour on the board.

☐ Repeat this shift
Creates one shift per matching weekday in the range, up to 90 days.

FROM DATE
13 Jul 2026

FROM TIME
09:00

TO DATE
13 Jul 2026

TO TIME
18:00

☒ Shift with a break
The break is unpaid: the shift requires its window minus the break.

BREAK DURATION
00:30

UNPUNCHED BREAK
None Deduct The Default Break Deduct From Overtime Only

What happens to a day with no punched break. Full can dip below the norm; overtime only never does — it just trims the excess above it.

REQUIRED WORK TIME
08:30 · derived

Times are office-local wall clock, stored as UTC.

Cancel Create shift

Figure 2 — The shift drawer — the same form handles a single shift or a series.

The save button reads **Create shift** for a one-off; it becomes **Create series** the moment you turn on **Repeat this shift** — section 6.

5 The break, and what the shift requires

A shift window is normally entered the way people talk about it — “ten till half six” — *with* lunch sitting inside it. So the window on its own is not what the shift requires: **the break has to come out of it**.

Turn on **Shift with a break** and you get:

- **Break duration** — unpaid, and subtracted from the window. Same *hh:mm* picker as the shift times above it, so **00:30** is half an hour.
- **Unpunched break** — what to do on a day where nobody punched a break at all (below).

Required work time under it is derived, not typed: it is the window minus the break, and it is the number the employee is measured against. A 10:00–18:30 shift with a 30-minute break requires **08:00** — so someone who punches their lunch lands exactly on the norm instead of half an hour short of it.

A new shift starts on the resolved office’s own break rule, so a shift worker’s day matches the office workers’ unless you change it. Leave the checkbox off and the shift requires its whole window, with nothing deducted.

The screenshot shows a configuration panel for a shift with a break. At the top, a checkbox labeled "Shift with a break" is checked. Below it, a note states: "The break is unpaid: the shift requires its window minus the break." The "BREAK DURATION" section features a time picker set to "00:30". The "UNPUNCHED BREAK" section has three buttons: "None", "Deduct The Default Break", and "Deduct From Overtime Only", with the last one being the active selection. A descriptive note below the buttons reads: "What happens to a day with no punched break. Full can dip below the norm; overtime only never does — it just trims the excess above it." The "REQUIRED WORK TIME" section at the bottom shows a value of "08:00" followed by the word "derived".

Figure 3 — The break: its length, the unpunched-break rule, and the required work time it derives.

Unpunched break decides what a day costs when the employee never punched one. **None** leaves the day alone — the whole presence counts as work. **Deduct the default break** charges the break once the day is worked to at least 75% of its norm, which *can* bring the day below the norm.

Deduct from overtime only never does that: it trims the break out of whatever was worked past the norm and stops there, so a day short of the norm or landing right on it is never touched. Any punched break, however short, opts that day out of either mode.

WHAT THE BREAK DOES NOT DO

It never moves the window. The shift still starts and ends when it says it does, and the board still draws it that way — the break only changes the *amount* the day requires. A break must also be shorter than the shift itself; the drawer says so before you can save.

On a shift that runs past midnight the break is split across the two days in proportion to how much of the shift falls on each, so the two days together always add up to the window minus the break — however the shift straddles midnight. Editing the break on one occurrence of a series pushes it onto

every other date you leave ticked in **Apply to** (section 7); a plain time change leaves each day's own break alone.

6 Repeating a shift

The **Repeat this shift** toggle only appears while creating — you can't turn an existing single shift into a series after the fact. Switching it on replaces **To date** / **To time** with:

- **Repeat until** — the last date the pattern can land on, plus **To time** for every occurrence.
- **Repeats on** — day-of-week pills (Mon...Sun), defaulted to the office's own working days until you touch one by hand.

A series is capped at **90 days** end-to-end — pick a range past that and the drawer blocks saving with an explicit warning instead of silently truncating it.

NEW SHIFT
DRAFT

EMPLOYEE
Michael Faraday

Only employees on a shift schedule are listed.

OFFICE (OPTIONAL)
London HQ

KIND
Regular

On-call, training and remote shifts get their own colour on the board.

☒ Repeat this shift
Creates one shift per matching weekday in the range, up to 90 days.

FROM DATE
13 Jul 2026
FROM TIME
09:00

REPEAT UNTIL
24 Jul 2026
TO TIME
18:00

REPEATS ON
Mo Tu We Th Fr Sa Su

CALENDAR
JULY 2026

		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

AUGUST 2026

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

☒ Shift with a break
The break is unpaid: the shift requires its window minus the break.

BREAK DURATION
00:30

UNPUNCHED BREAK
None Deduct The Default Break Deduct From Overtime Only

What happens to a day with no punched break. Full can dip below the norm; overtime only never does — it just trims the excess above it.

REQUIRED WORK TIME
08:30 · derived

Times are office-local wall clock, stored as UTC.

Cancel Create series

Figure 4 — Repeating a shift — the calendar previews exactly which dates will land a shift.

Once both **From date** and **Repeat until** are filled in, a calendar appears right in the drawer previewing every date the pattern lands on. Two flags can show up on a day: a cup icon for a custom office day off (the shift is still created there unless you untick it), and a small calendar-check icon where the employee already has a shift that day (a genuine clash — it still shows checked here, but the save step below is where it actually gets sorted out). After you save, if any date turned out to already have a

conflicting shift, a summary panel reports the created count and lists every skipped date with the reason — nothing is created twice, and nothing silently overwrites an existing shift.

ONE CLICK, MANY SHIFTS

A series creates one independent shift per matching date — not a single recurring record. That is what makes the cascade calendar in section 7 possible: editing later can target the whole remaining series, or just one occurrence.

7 Editing a shift, and the status lifecycle

Clicking any existing block reopens the same drawer with two additions:

- If the shift is part of a series with other editable occurrences, an **Apply to** calendar shows up so you can pick which of the remaining dates your change should also apply to, instead of touching every one of them by hand. Unticking a day that already carries a shift in the series marks it for deletion; ticking an empty one adds a shift there.
- A **Status** row of pills: **NEW** → **IN PROGRESS** → **FINISHED**, or **CANCELLED** / **LOST**. Changing it fires a lifecycle event (and any subscribed webhook) and notifies the employee — a shift created, updated or cancelled all reach them the same way.

Delete in the drawer footer removes just that one occurrence, not the rest of its series.

EDIT SHIFT #1850

×

EMPLOYEE

Isaac Newton

Only employees on a shift schedule are listed.

OFFICE (OPTIONAL)

London HQ

KIND

Regular

On-call, training and remote shifts get their own colour on the board.

FROM DATE

11 Jul 2026

FROM TIME

14:00

TO DATE

11 Jul 2026

TO TIME

22:00

☒ Shift with a break

The break is unpaid: the shift requires its window minus the break.

BREAK DURATION

00:30

UNPUNCHED BREAK

None

Deduct The Default Break

Deduct From Overtime Only

What happens to a day with no punched break. Full can dip below the norm; overtime only never does — it just trims the excess above it.

REQUIRED WORK TIME

07:30 · derived

Times are office-local wall clock, stored as UTC.

APPLY TO

Untick a day that already has a shift to delete it; tick an empty day to add one.

JULY 2026

		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

AUGUST 2026

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SEPTEMBER 2026

	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

STATUS

NEW

IN PROGRESS

FINISHED

CANCELLED

LOST

Changing status fans out a lifecycle event + webhook.

Cancel

Delete

Save changes

Figure 5 — Editing a shift in a series — pick which other occurrences the change should reach.

8 A narrow view of time

The role description on your profile says “without access to time tracking” — that covers the parts that change data. What you do get is read-only and scoped:

- **Time report** opens a matrix limited to shift-scheduled people, with XLSX export — handy for checking what someone actually worked against what was scheduled. The **Approvals** queue and the day-drawer’s manual corrections are not part of it; those need the Time manager role.
- **Following** lists check-in activity, scoped server-side to the same shift-scheduled group you can already see on the board.

9 Day-to-day checklist

SITUATION	WHAT TO DO
New roster for the week	Shifts → set the range → click empty tracks or New shift for each person, or one series if the pattern repeats.
Same pattern for several weeks	New shift → Repeat this shift → pick weekdays and an end date, check the preview calendar, then Create series .
One person’s shift moves	Click their block → adjust the date/time → Save changes . Use Apply to only if the rest of the series should move too.
A shift falls through	Open it → set Status to CANCELLED or LOST — the employee is notified either way.
Everyone on shifts is half an hour short every day	Their window almost certainly includes lunch while the shift has no break set. Open a shift → Shift with a break → the minutes → Apply to the rest of the series.
Payroll or a manager asks who was scheduled when	Shifts → set the range → Export .
Someone needs a shift schedule to begin with	Ask an admin, time manager or vacation manager to switch their schedule type to <i>Shift</i> on their profile — that’s outside this role.

HR.Click — Shift Manager Guide · v1.0 · August 2026. Product screens shown with sample data; names of persons are fictitious examples.