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QUICK REFERENCE · EVERYONE

Scheduling: who does what

Front-loaded once, then a weekly rhythm. Most of it belongs to one person — so the first thing worth knowing is whether that is you.

BUILDING IT

Once, at the start

Add your staff, name the shifts you use, set leave allowances.

The real legwork. Worth slowing down for.

BUILDING IT

Every week

Copy last week forward, adjust, then publish it.

Quick, because the setup did the work.

BUILDING IT

Every morning

Read the Day Board. Cover gaps, then publish again.

A cover that isn't published hasn't been told to anyone.

WORKING IT

All the time

Check your shifts, set availability, ask for time off.

Submitted isn't approved. Check the status.

Build → Check the rooms → Publish → Cover a change → Publish again

Three things people get wrong

- **Publishing freezes what staff see.** Every edit after it is private to you until you publish again.
- **A scheduled shift isn't proof anyone worked.** Schedule, attendance and timesheets are three separate records. Payroll uses attendance.
- **An empty room usually means missing shifts.** Someone added to your team but never scheduled appears on no day at all.

Who builds it is your decision, not Bloomily's

At a small center it is often the director. Past a dozen or so staff it usually should not be — an office manager or admin lives in this screen far more naturally, and the access to do it is set per person under Settings. What matters is that one named person owns publishing.

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IF YOU BUILD THE SCHEDULE

Set up once

The part worth slowing down for. Get this right and most weeks are a copy-forward rather than a rebuild.

SECTION 1

People

Team → People

Why it matters. Being on your team is not the same as being on a week. Someone added but never given shifts appears on no Day Board at all, which reads like a broken screen rather than a missing shift.

SECTION 2

Shifts

Week menu (More actions) → Shifts

Why it matters. Shifts are the named time blocks a day is set from. Name the ones you use often and setting a day becomes one click instead of typing times.

SECTION 3

Rooms

Team → People → their record → Assign rooms

Why it matters. Tick every room a person might realistically work in, and set one as their main room. The schedule drops them into the main room automatically — and you can only ever move someone into a room already ticked here.

SECTION 4

Leave allowances

Before the year starts

Why it matters. Allowances are what time-off requests count against. Set them before the first request arrives rather than after.

Your setup checklist

- [ ] Staff added, invited, and showing as accepted
- [ ] The shifts you actually use are named — and one is the default
- [ ] Rooms ticked for everyone, and a main room set for anyone in more than one
- [ ] Leave allowances set for the year
- [ ] One person owns publishing — one person pressing publish beats three people assuming

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KEEP THIS BY THE SCREEN

What the pill means

One small pill beside the week tells you what staff can see. It is the only thing that does.

Not published nobody has been told yet

Published Sep 8 staff see exactly that version

Unpublished updates staff are still on the old one

Publishing freezes what staff see.

After you publish a week, every edit you make stays on your screen only. Staff keep reading the version you published.

And the pill does not update on the screen where you made the change. It still reads *Published* until the page is reloaded. Nothing looks wrong, so nothing prompts you.

Publish again after every change. Every time.

Not published means different things at different centers

At most centers staff see the week as you edit it, and nobody has been told about it yet. At centers that require publishing, staff cannot see the week at all. Hover the pill and it tells you which.

Publishing a week

1. Open the week and check the dates at the top
2. **...** (More actions) → **Publish schedule**
3. Read the preview — it names who will be told
4. **Publish & notify**
5. After any later edit: **Publish updates**

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EVERY MORNING

Reading the Day Board

Click a date heading on the week to open that day's room plan.

SECTION 1

Who is where

Blocks, rows and dashes

A solid block is planned work and its time window. Lunch, prep and support sit in their own rows. Dashed blocks are approved late arrivals and early departures — time away from room coverage. Block colours do not tell you whether time is paid.

SECTION 2

The ratio numbers

children · planned staff / required staff

Read the coverage strip one interval at a time. Red means a gap — but a gap can mean nobody has been scheduled yet rather than that you are short-staffed.

Check each interval, not the room summary.

A red room summary can combine periods staffed differently. A room that reads as uncovered may have someone in it for part of the window. Open the staff blocks and the detailed strip before you move anyone.

When someone calls in

1. **Reassign** — move someone already working into the room
2. **Post an open shift** — from the week menu. Any eligible staff member can claim it from their app
3. **Approve a swap** — swaps start with the staff member, not with you
4. Then publish again, whichever route you took

Print the daily staffing record

From the Day Board, check the date and print. It is a plan, not proof of attendance, and printing tells nobody. Team → Attendance is where you see who actually clocked in.

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COVERING A ROOM

Moving people between rooms

Two different moves on two different screens. Pick the one that matches how long the cover needs to last.

For a week on the Schedule

The week grid — open that person's actions menu and choose **Move to another room this week**. Only that week changes and their hours stay the same.

For a day, or part of one on the Day Board

That day's room plan — click their work block, choose **Move to a room…**, then set **From** and **To**. An hour covers a lunch break; their whole shift covers the day.

Three things nothing on screen tells you.

They have to be assigned to the room first. You can only move someone into a room already ticked on their profile. If the room is missing from the list, that is why — not a fault.

Set their week before you try to move them. The move option only appears once they have days on that week, so a blank row offers nothing and looks as though the feature is missing.

Room access stays until you take it away. Ticked a room just to cover one week? It is still ticked afterwards. Nothing clears it for you.

When the cover ends

Go back to their profile and untick the room you added. Otherwise they keep appearing as available for a room they do not work in, and the next person building the rota has no way of knowing it was temporary. And if the week was already published, publish again — a room move is a change like any other.