



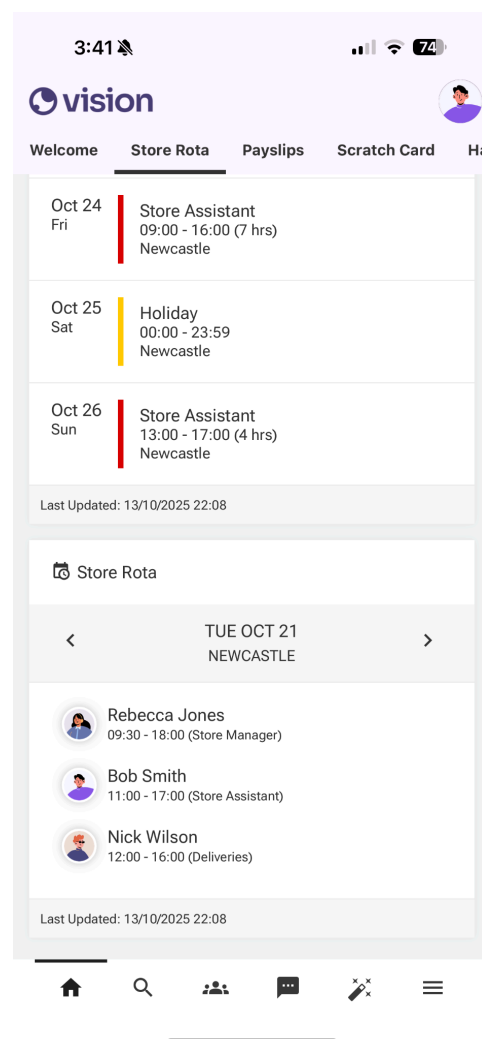
Rota Integration

October 2026

This guide covers:

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- [Viewing My Rota](#)
- [Viewing the Store Rota](#)

Oak supports importing your rota information into your intranet from a third-party system, allowing employees to view their rotas in one place, via their mobile app or desktop. There are two applets that display rota information: Rota Applet and Store Rota Applet.





Set-up

1. To use this feature, OIS (Oak Integration Service) must be installed and enabled first. For guidance on OIS, please reach out to your Account Manager or the Oak Support team.
2. Once OIS is installed, the file scheduled hours need to be configured. Navigate to **Actions > Configure > Site Settings > OIS**. Select the hostname of your OIS installation to show a list of available modules.
3. Select **File Transfer**.

Active Directory Single Sign-on	Allows users to be automatically logged into Oak using their windows network account
Active Directory User & Group Synchronisation	Updates Oak users with your Active Directory users.
Data Import	Imports data to Oak from company servers.
File Auto Upload	Imports files from your company servers to Oak.
Exchange	Enable communication with Exchange
File Transfer	Transfer data from directory to Oak
Mail Processing	Pulls emails from an internet or on-premise mail server and processes them in Oak

4. Slide the **Application Status** toggle to enabled. You'll then be able to add a file processor. Select **+ Add First Directory**.
5. From the list, select **Process Scheduled Hours Spreadsheet** which will show further options below:

This module allows you to choose a directory and upload the contents to Oak. Once uploaded it will be processed by one of the predefined processors.

Processor	Process Scheduled Hours Spreadsheet *	Path	Path *
Processed Folder Name	processed	Domain	Domain
Include Subdirectory	No	Username	Username
Filter	*.csv	Password	
Notify users	Choose	Notification level	No email



Processor: Set this field to 'Process Scheduled Hours Spreadsheet'

Path: Add where your rota file(s) and associated subfolders are stored. This will be on the machine that OIS is installed in. A share can be used, but ensure that the service has **read and write access**

Processed Folder Name: Once the file(s) have been picked up by the OIS service, it will stamp the beginning of the file with the date and time and move them into this folder inside the folder specified above

Include Subdirectory: If it's a folder within the path (other than the folder name above), it'll attempt to process the files inside it

Filter: This will allow you to ignore certain other files that may be placed within the directory, however they are not a rota file

Notify Users: Click on **Choose** to select those who'll receive an email (dependent on the Notification Level)

Notification level: Specify the types of notifications you would like to send; no email, only email when an error occurs, or after every import attempt

Domain/Username/Password: Required if the OIS service requires further permissions to access the data at the given path

- Once the above fields have been completed, select **OK** to save the configuration. The OIS service will check-in periodically (every **5 minutes** or so) and will download these settings to begin monitoring the path.

Importing Rota Data

The rota file added to the designated folder must be a CSV file formatted with the following structure:

Payroll	Work date	Store ID	Start Time	End Time	Description of work	Special
{Payroll ID}	{YYYYMMDD}	{Office ID}	{HHMM}	{HHMM}	{Text}	{Optional text}



File Structure & Data Scope

- Each uploaded file must contain the complete set of rota data for all included employees. Once imported, the new file completely replaces any existing rota data in the system
- A typical export should include today's schedule plus a specified number of future days or weeks for all employees.
- We recommend running this import process overnight so that updated schedules are immediately available when employees log in the following morning.

Formatting Rules & Limitations

- Ensure each employee has only **one** start and end time entry per day.
- While the system will accept and successfully import files containing multiple lines per employee for the same day, the data will not display correctly in the application.

Data Validation

- The system does not perform pre-import validation checks (such as verifying whether a Payroll ID exists prior to import).
- Instead, the system automatically matches the imported rota data to the user profile upon their next login.

A 10-day rota containing employee data should follow this structure:

	A	B	C	D	E	F	G
1	123467	20190922	772001	800	1600	Store Assistant	
2	123467	20190923	772001	800	1600	Store Assistant	
3	123467	20190924	772001	800	1800	Store Assistant	
4	123467	20190925	772001	0	2359	Store Assistant	Holiday
5	123467	20190926	772001	0	2359	Store Assistant	Holiday
6	123467	20190927	772001	700	1430	Store Assistant	
7	123467	20190928	772001	1000	1600	Store Assistant	
8	123467	20190929	772001	800	1600	Store Assistant	
9	123467	20190930	772001	900	1700	Training	
10	123467	20190931	772001	745	1600	Store Assistant	



Special Field (optional)

- The Special field allows you to emphasise specific activities (such as holidays) so they stand out clearly within the rota application. It's entirely optional.

File Processing & Timing

- Once files are populated and placed in the configured directory, processing begins almost immediately.
- If you are uploading multiple files, we recommend dropping them into the directory during early morning hours. Because files are processed sequentially, this ensures all employee rota data is fully updated and ready for the start of the workday.

Viewing my Rota

Once the rota file has been successfully imported, the information will be immediately available to employees via the My Rota Applet.

MY ROTA	
<	OCT 28 - NOV 3 WEEK 44
26 Hours Total	
Oct 28 Mon	
Oct 29 Tue	
Oct 30 Wed	
Oct 31 Thu	Store Assistant 08:00 - 16:00
Nov 1 Fri	Store Assistant 08:00 - 16:00
Nov 2 Sat	Store Assistant 08:00 - 18:00
Nov 3 Sun	Holiday 00:00 - 23:59
Last Updated: 31/10/2019 10:57	



Colour-coding

- Any historical data preceding the uploaded file, or specific dates omitted from the rota, will appear **grey**
- Today's schedule is highlighted in **blue**
- Upcoming schedules are displayed in **red**
- Any entries marked with a special activity (such as holidays) are highlighted in **yellow**

Configuring the applet

You can customise several applet settings, including the number of weeks of rota data displayed to employees.

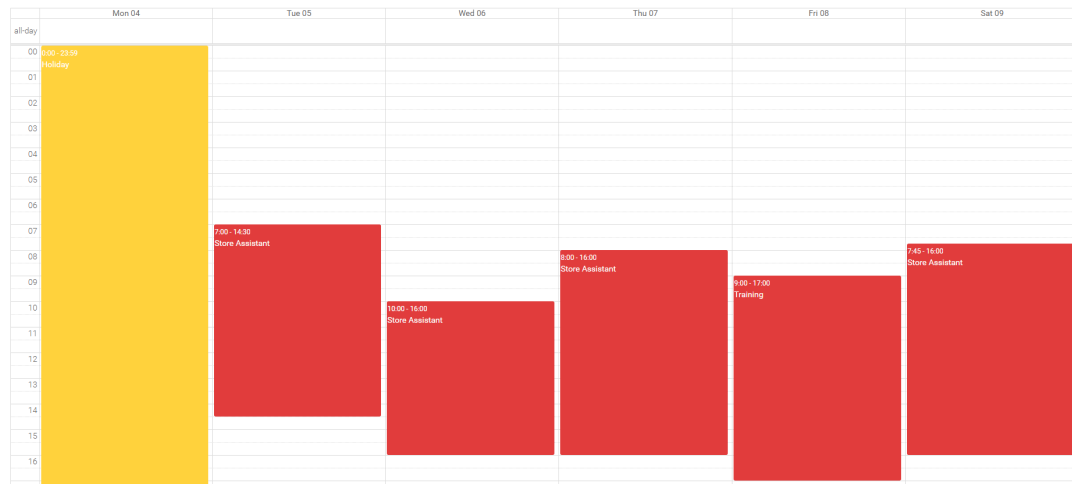
 My Rota

Title	My Rota	
Icon		×
Show title	☒	
Hide when no data available	☐	
How many weeks of Rota data should show	<input type="range"/>	2

Undo Close

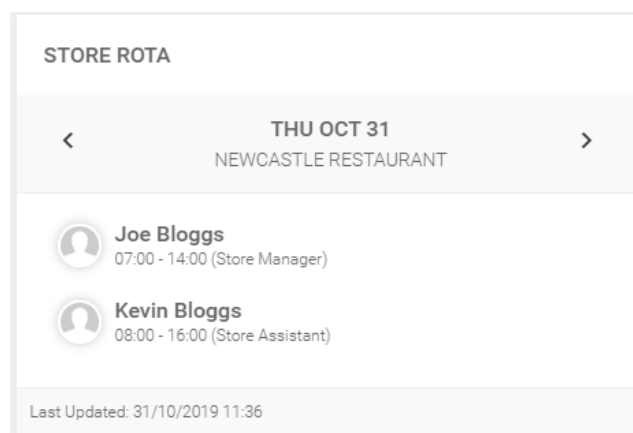
Calendar view

4 – 10 Nov 2019



View the Store Rota

- Daily view: When data is available, the applet displays a daily view showing who is on the rota for the user's assigned office
- Scheduled refresh: The data is refreshed automatically on a regular schedule, with a default run time of **5:30AM**





Configuring the applet

You can customise several applet settings, including the number of days of rota data you want to display.

 Store Rota

Title

Store Rota

Icon

Show title

☒

Hide when no data available

☒

How many days of Rota data should be shown

14

Undo

Close