Check next week before you publish it

A short guide to the Weekly Staffing & Cover Planner: enter one team, find the gaps, and assess cover without hiding missing information.

What is inside

- A dashboard of what needs attention before publishing
- A worked Northgate example with deliberately seeded problems
- How to replace the example with one real team
- How to assess cover after an absence

Yours whether or not you ever talk to us.

1. Read the Results sheet first

The example workbook opens with a small week already filled in. Dashboard counts what needs attention; Results names the affected shift, assignment or worker so the planner knows where to fix it.

A red result is a detected conflict. Amber means information is missing or a planning threshold was exceeded. Green means the workbook found no issue in the data you entered. Green is not proof of legal compliance or physical attendance.

Done when

- [ ] The uncovered Northgate shift is visible
- [ ] The overlapping assignment is visible
- [ ] The missing site permission is visible

2. Replace the example with one team

Enter stable worker ids, names and contracted weekly hours on People. Add one row per skill or site permission on Eligibility, including its evidence status and review date. Then record availability windows and the shifts that must be covered.

Keep ids unique. The formulas join sheets by worker id and shift id; a renamed person is harmless, but a duplicated id makes the result ambiguous. Leave an unknown value blank instead of guessing. Missing information should stay visible.

Done when

- [ ] Every worker has one unique id
- [ ] Every required shift has one unique id
- [ ] Eligibility records have a status, review date and consistent tag

3. Add assignments and resolve the result

Add one row per worker assigned to a shift. The workbook checks whether the shift and worker exist, whether the worker is available for the whole shift, whether another assignment overlaps, and whether the required skill and site permission appear in the worker record.

Set your own weekly-hours and minimum-rest thresholds on Settings. Resolve the named rows, then review hours by worker. These are planning signals: they can reveal an uneven week, but they do not account for every contract, break rule, premium or legal limit.

Done when

- [ ] No required shift is short of its headcount
- [ ] No assignment has a red check
- [ ] Hour differences have been reviewed

4. Assess cover after an absence

On Absence cover, enter the affected shift id and the absent worker id. The sheet evaluates every person against the same availability, overlap, skill and site-permission inputs. It explains each exclusion instead of silently removing the person.

The remaining names are candidates, not assignments. Check travel, current information and anything your workbook does not contain before offering the shift. When ready, the Fivexer import sheet combines each worker and their tags into the columns the console importer recognises.

Done when

- [ ] The affected shift is correct
- [ ] The absent worker is excluded
- [ ] A planner reviews the candidate before making the change

When the workbook has done its job

Keep using it while one planner can maintain the inputs confidently. Move the workflow into a shared system when availability changes faster than the sheet, several people edit copies, or you need a durable record of why work was offered to one person.

The workbook is yours to use without an account. If you want to run the same workflow with live worker, roster and routing records, start with one team in Fivexer.

- Workforce scheduling guide - https://5xer.com/workforce-scheduling/
- How matching works - https://5xer.com/docs/concepts/how-matching-works/
- Start free - https://5xer.com/signup/