

HOW TO USE MY ROTAS For Rota Overseers

Ministry Overseers are able to create, manage, publish and distribute rotas in the My Rotas section within My ChurchSuite.

While team members can view their upcoming serving commitments, organise swaps (if option enabled) and add their unavailability in My Rotas, Ministry Overseers have the full functionality of rota management in My ChurchSuite.

Adding a new Rota

Overseers can add new rotas set with a "Draft" status while they are being set up; after which they can be set as active by changing their status to "Published", and then distributed. Draft rotas can only be seen by Overseers; Published rotas can be seen by all rota team members.

To add a new rota for a Ministry, select "+Rota" on the My Rotas page (located under the 'Next Serving' section).

My Rot	tas		
Next Ser	rving		Ti iCal G Google O
May			
25 мау	Worship Today	Worship Leader Electric Guitar	
29 мау	Lighting team Sunday		
31 мау	Duty Pastor Tuesday		KEEP CALM MERRE
		⊕ Show more	
Rotas			Rota

Next, select:

- the Ministry,
- the Start and End Dates the rota will run from and to,
- the Day(s) that the rota runs on, and
- the Times in which team members will serve.

You can minimise rota 'clash' occurrences by setting accurate times that reflect when your teams are actually serving - for example, it's entirely possible for people to serve in more than one Ministry on a Sunday and for there not to be a rota clash - as long as the rota serving times are set accordingly.

			KINGS HO	PE CI	HURC	H		
✤ Home➡ My Communication	Add Rota						Save Changes or	Cancel
 My Children My Events My Groups 	Ministry Car Park Directors			•	Team Rotat			•
 ★ My Rotas ⊟ My Giving 	Date	→	01-07-2018		Teams to R 3 Selected			•
My Podcast Search for Others Kings Facebook	Days			•	Start Team The A Tea			•
Small Group Resources	Time				Serving Pat	tern		
 Kings Freecycle Kings Website Log out 	10:30am 🝷	\rightarrow	12:00pm	•		Date(s)	onths each team will serve for before	k.
	Allow members to sign u	p to futu	ire dates?					

Now set the 'Team Rotation' - either **Ad Hoc**, **Simple Rotation** or **Serve 13**. The team rotation set in the underlying Ministry in ChurchSuite is suggested by default. Note that "Teams to Rotate", "Start Team" and "Serving Pattern" are only options depending on the Team Rotation selected.

Team Rotation
Simple Rotation -
Teams to Rotate
3 Selected 🗸
Start Team
The A Team 🔹
Serving Pattern
1 Date(s) •

The number of consecutive dates/months each team will serve for before rotation continues to the next team.

Which Team Rotation?

- Ad Hoc. If your Ministry does not follow a specific serving pattern, e.g. once per month on the first Sunday, select AdHoc. When you add a new rota, you'll be able to manually assign individuals or teams to each date.
- Simple Rotation. Create any number of teams and have them follow a simple rotation pattern. For example, if a team serves every 3 weeks, create three teams; if a team serves every 6 weeks, create six teams. With 'Simple Rotation', specify which 'Teams to Rotate', the 'Start Team' for the rotation, and the serving pattern for each team.
- Serve 13. Four teams serve once per month, e.g. Team 1 on the first week, Team 2 on the second week, etc. On months with five weeks, the extra week will be covered once per year by each team in rotation. During a year, each team will typically serve 13 times. You must have 4 teams to be able to select Serve 13.

Scrolling down the 'Add Rota' page further will show the Ministry's teams, members and their roles within their team; if teams have already been set up.

Dates Members					
			(⊕ Team	ې Order
Gav's Band			• Member	🖌 Edit	⊖ Delete
George Baker	07987 654 321	Drums			-
JB James Bonding	james.bonding@gmail.com 07158 723 145	Keyboard		Edit roles Remove me	ember
Gavin Courtney	support@churchapp.co.uk 07595 169 172	Electric Guitar	Worship Leade	er)	

Refer to sections below for more detailed guidance on:

- editing teams (adding members, setting their role and renaming a team),
- adding new teams,
- deleting and re-ordering teams; and
- editing roles or removing team members.

Saving your changes will now create your Draft rota (with the teams, members and roles you have set). Once a rota is created, it is not possible to change the rotation; however you can still make ad hoc changes to your rota e.g. adding additional team members, amending roles etc.

Adding teams and members, ordering and removing teams

Select a rota from the list in My Rotas. Click "Members" to view any pre-existing teams, members and roles. For a new Ministry it may be that no teams have been added yet. You can do that now. To add a new team, select "+ Team" at the top of the Members page.



Enter a team name e.g. Week 1, Week 2, Team A, Team B, Reserves, John's Team.

Add team	×
Team Name	
Team 4	
Search for a new member	
New members will appear here.	
Save Changes Cancel	

You can also add new members to your team here, if you wish, using the "Search for a new member" option. Only contacts whose personal visibility settings have their name set as 'visible' can be searched. The search results will auto-complete as you type. Select a contact from the list to add as a member. Depending on the roles that may already exist for the Ministry, you can also assign a role to your new team member.

Team Name			
Team 4			
Search for a new	member		
Peter Jefferies			×
Peter Jefferies	Cup-bearer	Grape-treader	×
	Cup-bearer Leader	Grape-treader	×

Continue adding further members to the team, if you wish. When you are finished, click 'Save Changes'.

Dates	Members				
			Add member	⊕ Team	¢ Order
Sund	ay AM		(Member	🖌 Edit	⊖ Delete
9	Gemma Alexander	gemma.alexander@gmail.com 07775 354 829	er		
C	Jon Hallam	jon.hallam@facebook.com 07414 146 457			$\overline{\mathbf{u}}$

You can also add members to a team by clicking "+ Member".

As before, simply search for a contact to add as a team member, select the contact and assign a role as required (if roles have already been set up for your Ministry). Note, also, that you can choose to "Add members to all future dates" on draft or published rotas for this ministry.

Add member: Gav's Band	×
Add team member	
Q Search for personAdd members to all future dates	
Gavin Courtney	×
B/VoxDrumsElectric GuitarGuitaristKeyboardPercussionWorship Leader	
Save Changes Cancel	

Helpfully, if a Ministry has multiple teams, you can change the team order by clicking the "Order" button on the Members page.

Dates	Members				E	dit team ord
				(⊕ Team	¢ Order
Sund	ay AM			Member	🖌 Edit	⊖ Delete
	Gemma Alexander	gemma.alexander@gmail.com 07775 354 829	Team leader			\odot

Use the "up" and "down" arrows to set the team order. The team order is used when adding a new rota with Simple Rotation or Serve 13. Save your changes when finished.

Or	der	×
	Communion Prep Team 1	¥
	Communion Prep Team 2	†
	Communion Prep Team 3	1
	Save Changes	

At any time you can edit a team (perhaps to change a team name). Click "Edit" and make your changes. Remember to save your changes.

Dates Members			
		Edit team	0 Order
Sunday AM		Member Edit	⊖ Delete
Gemma Alexander	gemma.alexander@gmail.com 07775 354 829	der	

You can also delete an entire team if you wish. Click "Delete" and confirm your request.



Allowing team members to 'sign-up' for rota dates

One of the great features of My Rotas for Ministry Overseers is the ability to create and publish rotas that have available dates that serving team members can choose to sign-up for. 'Sign-up' can be enabled on a rota-by-rota basis, giving Overseers flexibility to choose the rota-recruitment method that suits a ministry best. It's incredibly versatile and can be useful in lots of different scenarios, e.g.

- To publish an empty future rota and then invite team members to sign-up for the future date(s) they're available and can serve.
- To publish an incomplete rota and ask team members to sign-up to those future dates where there is still need.

Helpfully, rotas with 'Sign-up' enabled show with a "tick" symbol before the rota name in My Rotas.



When ministry members login to My ChurchSuite and view the rota, they'll see "+ Sign up for this date" on those rota dates where there are still team places to be filled.



Signing up displays a confirmation. Importantly, Overseers can instantly see new 'sign-ups' on the rota in their My ChurchSuite.

How to enable 'sign-up'

To enable rota 'sign-up' functionality (and having first created a rota for a ministry), click "Edit rota" at the top of the rota page.

Lighting team My rota			Edit rota		
	•	Date	🖍 Edit	⊖ Delete	🖾 Rota

First, tick "Allow members to sign up to future dates?" to enable 'sign-up' for that rota; and then specify the maximum sign-ups per date. If you want to recruit 3 members for each date on the rota and already have 2 members on the rota, you would set the maximum sign-ups to 5. Note that this 'maximum' is a global quantity that is applied to all dates on the rota.

Edit rota X
Name
Communion Team
Start time
10:30am 🗘
Order by
Name \$
Status
Published \$
Draft rotas can only be seen by Overseers; Published rotas can be seen by all rota members.
Allow members to sign up to future dates?
Maximum sign-ups per date
5
Save Changes Cancel

Having set a global 'maximum sign-up' quantity, you can also set a different maximum on a 'per date' basis; allowing you to set custom sign-up quantities when needed. To do this, select "Edit date" on the rota.



Enter the revised 'maximum sign-ups' for that date.

Start time	
10:30am	\$
Notes	
Baptism Service	
	1,
Maximum sign-ups	
3	

Publishing a draft rota

Whenever you're working with a Draft rota, an information message is displayed at the top of the rota page.



Click "Publish now to allow others to see it". Add content to the email body if you wish. The rota and contact details of team members is appended to the email automatically - click 'preview' to see what the email will look like. Note that only those contact details of team members whose visibility settings permit are included - if any team member has chosen not to make their contact details visible, they won't show in the distributed rota (although they will still receive the email). Click "Send Email" to send your rota and set your rota as "Published".

		Publish rota	×	
		Email rota members? Subject		
	Home	Liturgical Dance Ministry 10:30am - Rota now published		Publish rota
	My Communication	Body		
	My Children	Hey Team!		
	My Events			
	My Groups	The new rota for next term is now published and attached to this email. There's one or two empty dates - if you're available, please sign-up to any additional dates you can cover.		t \ominus Delete 🖾 Rota
*	My Rotas	Thanks for serving		
	My Giving			
	My Podcast	Gavin		
	Search for Others		1,	k at this guy
	Kings Facebook			
	Small Group Resources	Full rota will be included. Preview		
	Kings Freecycle			
	Kings Website	Publish Rota Cancel		
	Kings New Partner			
	Application			

Switching between Name view and Role view

When viewing Dates on a rota, you can switch between Name view (alphabetical order) and Role view. Using Role view for example, can be helpful for quickly identifying whether you have sufficient serving team members covering each of the roles on a given rota date. It is not possible to change the order that roles are displayed in.

Name view example



Role view example

5 10:30am Band 2	\bigcirc	12 10:30am Band 1	-	19 10:30am Band 2	\odot	26 10:30am Band 1	-
⊕ Add to date		⊕ Add to date		⊕ Add to date		⊕ Add to date	
Worship Leader	0	Worship Leader	0	Worship Leader	0	Worship Leader	0
Guitarist	2	Guitarist	1	Guitarist	2	Guitarist	1
🚱 Gemma Alexa	n	🎯 James Jones	\odot	Gemma Alexa	in()	😨 James Jones	
🕵 David Shaw	\bigcirc	Keyboard	1	🕵 David Shaw		Keyboard	1
Keyboard	0	JB James Bonding	g 💬	Keyboard	0	JB James Bonding	
Percussion	0	Percussion	1	Percussion	0	Percussion	1
B/Vox	1	James Jones	-	B/Vox	1	James Jones)
🚱 Gemma Alexa	n()	B/Vox	0	Gemma Alexa	in(B/Vox	0
Drums	1	Drums	1	Drums	1	Drums	1
David Shaw	-	George Baker		David Shaw		George Baker	
Electric Guitar	1	Electric Guitar	1	Electric Guitar	1	Electric Guitar	1
David Shaw	-	James Jones		🕵 David Shaw		James Jones	
No role	1			No role	1		
Peter Miller	()			Peter Miller	()		

To change the rota view, select the "Edit Rota" button in the top-right corner of the rota page.

Lighting team My rota		Edit rota		
	Date	🖍 Edit	⊖ Delete	🖾 Rota

There, select the desired view from the "Order by" drop-down menu and save your changes.

Order by	
✓ Name	•
Role	

Adding new members directly to a rota

Once your rota is up and running and published, it's often necessary to make changes. You can add new members directly to your rota quickly and easily. Begin by clicking "+ Add to date".

June 2016



Either select from the list of Ministry members displayed, or use 'Search for person...' to find a contact who is not in the Ministry.

If a rota member has a role/s it'll auto-select the role/s when you add them to a date. If a rota member has different roles on different teams within a ministry you will get the option to choose which role/s you want to assign on that date.

11 11 10 10 10 10 10 10 10 10 10 10 10 1	
Save Changes	×
Leader Helper	
Save Changes Cancel	¢

Toggling the search from Ministry "People" to "Teams", you have the option to add an entire team to your rota date. For example you might use your reserve team.

Add to date	×
Q Search for person.	
People	Teams
Band 1	
Band 2	

Children on rotas

You can add children to your rotas (perhaps members of your youth). This is done in exactly the same was as adding an adults. Simply search for the child's name and add them as described above. Children are designated by a 'child avatar' next to their name on the People list (see below) or in the Members page. Child avatars don't display on the rota when viewing Dates.

Add to date	×
Q Search for person.	
People	Teams
BA 🛊 Becca Adams	
Gemma Alexa	nder

Assigning or changing roles

When you first publish a rota for a Ministry, team members are assigned any role(s) specified in the underlying teams. These can be overridden, deleted or added to in a rota without affecting the underlying teams - this allows you to make custom changes to suit your ministry's particular needs on any given rota date. Importantly, rota members can be assigned multiple roles - this means that in Role View, a team member may show more than once - they'll show under each role they are assigned.

To add or edit a rota member's role, click the 'edit' button on the right of their name on the rota. For members without a role, you can select "Add role".



For members who already have a role, you can select "Edit role".



In both instances you can now select one or more roles (or deselect roles) from the list of roles available to the Ministry. Click "Save" once you've made your role selection.

Top Tip!

In Role View, you get a visual numeric indicator or the number of team members in a role. If you hover the cursor over a role, the "Add" to role button appears. Any team members added using this "Add" button will be assigned with that role automatically. *This is therefore a much quicker method of adding people straight into roles on your rota, compared to the "Add to date" method explained above.*

Duplicating a team from an existing date

In addition to adding members to a rota date individually, you can also duplicate the members from another rota date. Within the rota date you're wanting to add people to, select "Duplicate from date".



Select the date from the drop down menu and optionally choose whether to also overwrite the team name and date notes on your target date. Click "Duplicate From Date" to confirm.

Duplicate from date	×
Duplicate from	
01-May-2016 10:30am	\$
Include team name?	
This will overwrite any team associated with the target	date.
Include date notes?	
This will overwrite any notes on the target date.	
Duplicate From Date Cancel	

Swapping two teams

You can swap an entire list of serving team members (including their assigned roles) between two dates. Working within one of the dates on your rota, click "Swap date".



Choose a date to swap with, from the drop-down menu. Confirm the swap by clicking "Swap Date".

Swap date		×
Swap with 25-May-2016 6	:30pm	\$
Name	Roles	
George Baker	Drums	
James Bonding	Keyboard	
Gavin Courtney	Worship Leader Electric Guita	3
James Jones	Guitarist B/Vox	
	Swap Date Cancel	

Removing members from the rota

To remove a member from a date on a rota, select "Remove member" from the menu option next to a contact's name.



In addition to being able to remove them from that single rota date, you can optionally choose to remove the team member from all future dates on the same rota, and to additionally remove them from the underlying linked Ministry entirely (which will remove them from all teams).

Remove member >	<
 Remove from date The team member will be removed from the selected date. Remove from all future dates 	
Additionally, remove the team member from every future date on this rota.	
 Remove from linked ministry Additionally, remove the team member from the Ministry linked to this rota so they no longer appear on future rotas. 	
Remove Member Cancel	

Adding Notes to highlight special dates on your rota

Those special occasions, like Baptism services, that can often catch us out on rotas - extra visitors, so we might need more serving team members that week. Rota notes are rota-specific and allow you to add custom messages to a rota date as a reminder to rota members and overseers - like, "Baptism Service-more chairs needed" for your set-up team rota.

To add a Note, select "Edit Date".



Type your note in the Notes field. You can add multi-line notes and even include short URL links if you wish. Click 'Save Changes' when finished.

-	
Start time	
10:30am	÷
Notes	
Maximum sign-ups	
2005 12	

The note is added to that rota date under the team name.



Adding dates to your rota

You can easily add additional dates to a published rota. You can even add another occurrence of an existing date but at a different time - ideal for those three identical Christmas carol services you've got back to back! To add a date click the "Add date" button at the top of the rota page.

Worship My rota	Add date			
	① Date	🖌 Edit	⊖ Delete	🖻 Rota

Enter the date and time and any optional notes. Click "Add Date"

Select the date you'd like to add to the ro field below. When you're ready, just click button.	
Date to add:	
28 🛊 May 🗘 2016 🛊	
Start time	
10:30am	\$
Notes	
Church Birthday - Extra Service	
	1,
Max capacity	

A new, empty date (and time) is added to your rota, ready for you to add team members to - perhaps by duplicating from a date (see earlier section).

28 10:30am Church Birthday - Extra Service	29 10:30am Gav's Band
⊕ Add to date	⊕ Add to date
	George Baker ····
	JB James Bonding Kevboard

Removing dates from your rota

You have two options here. You can either "clear down" the date (removing all team members from the date) but leave the date in place on the rota with empty roles intact (perhaps to be added to another time); or you can remove the date entirely. Neither of these changes make any changes to your underlying Ministry teams and team members.

To clear down the team members for a given date, select "Clear date". You'll be asked to confirm.



To delete all team members from a date and remove the date entirely, select "Delete date". You'll be asked to confirm.



Using the rota group email

Each rota has its own unique Rota email address. Rota group emails are "closed group" emails. Only rota or ministry members will receive emails or be able to send emails to the other group members. Rota group email is ideal for circulating prayer requests or organising swaps.



New emails are sent to all rota team members. Note that you can set whether replies are sent just to the originator of the message (default), or to all members. Note that closed group emails are logged in My Communications section for all recipients and the author.

Liturgical Dar	Ce Ministry 10:30am Send email Send Email or Cancel
From	Paul Nation <paul@churchsuite.com></paul@churchsuite.com>
То	Liturgical Dance Ministry 10:30am <demo-r-h9uz4c1v@in.churchsuite.co.uk></demo-r-h9uz4c1v@in.churchsuite.co.uk>
Subject	Can anyone swap with me?
Body	Hey guys, I'm unable to serve on Sunday 3rd September; are any of you free to swap with me - I'm happy to do one of your dates. Thanks Peter
Replies	 Send replies just to me Send replies to me and all other members

When ministry overseers use the rota group email, they have an additional option that enables them to append the rota to the email. In this way, just like when publishing a draft rota, you can include the rota in your message - perhaps to let the rota members know about significant changes to the rota.

Media 10:30a	M Send email	Send Email or Cancel
From	Paul Nation <paul@churchsuite.com></paul@churchsuite.com>	
То	Media 10:30am <demo-r-svjwwsoc@in.churchsuite.co.uk></demo-r-svjwwsoc@in.churchsuite.co.uk>	
Subject	Media 10:30am - Rota now published	
Body		
		//
	Append rota to email	
Replies	Send replies just to me	
	Send replies to me and all other members	

Renaming your rota or changing the rota start time

In most instances your rota will have the name and start time assigned when it was first published. To change the rota Name or Start Time, select "Edit" at the top of the rota page.

Duty Pastor Myrota		Edit rota		
	⊕ Date	🖍 Edit	⊖ Delete	🖾 Rota

Now you can edit your rota Name and/or Start time. Remember to save your changes.

Name	
Duty Pastor	
Start time	
10:30am	\$
Order by	
Name	\$
Status	
Published	÷
Oraft rotas can only be seen by Overseen can be seen by all rota members. ☑ Allow members to sign up to futur	
can be seen by all rota members.	

When changing the rota start time, bear in mind that the duration of the rota date slot remains the same. So if the rota is created to run from 10:30am to 12 noon (1.5 hours), adjusting a rota start time to 11am will run the serving time slots for 1.5 hours from 11am, i.e. the rota dates end at 12.30pm instead of noon.

FAQs

- Q. Can I create a new Ministry in My Rotas?
- A. No. Creating a new Ministry and assigning overseers remains an admin function that needs to be done in ChurchSuite by the **Revive Church** Comms Team. Overseers do not have the ability to do this within My Rotas.

- Q. Can I change the rota rotation once a rota is published?
- A. Whilst you can make lots of changes to rotas once they're published, it is not possible to change the rotation, as the rota inherits the rotation at the point it is generated. Therefore, to publish a rota with a different rotation add a new rota with the new rotation. You can then remove the old rota.
- Q. What's to stop anyone from signing up to be the preacher or a leader!?
- A. Only members of the underlying Ministry can sign-up to rota dates in My Rotas. Additionally, 'signups' can only choose from those roles already assigned to them in the underlying Ministry. This can be helpful for your worship team for example - you could use Roles in the Ministry to reflect all the instruments that people can play, and then, at the point of signing up, they can select which role they are signing up for.
- Q. Do overseers receive a notification of sign-up?
- A. No. Imagine a large church publishing an empty rota with a sign-up capacity of 40 members for a 6month rota - the overseer would receive 1040 sign-up notifications! Many of those sign-ups would also reply to the sign-up request email - potentially a further 1040 emails! We don't think this is helpful to the overseer. Instead, overseers can view their status of their previously empty rota in My Rotas. A visual sign-up indicator bar shows sign-up progress on a date-by-date basis.
- Q. What clash notifications are provided?
- A. When overseers add members to a rota date and they're already serving on another rota on the same date and time, a clash notification is displayed for the overseer - the overseer can then choose to proceed and accept the clash, or cancel. Similarly, if a team member attempts to sign-up on a date/ time when they are already serving on another rota, a clash notification is displayed and the sign-up is not permitted
- Q. Can I set or modify rota reminders in My Rotas?
- A. No, this is not currently possible. Rota reminders are part of the underlying Ministry of a rota and can only be set or modified in ChurchSuite by the **Revive Church** Comms Team.