Working with Rotas in My ChurchSuite

1. Adding a new Rota

To add a new rota, click the **+ Rota** button located on the right-hand side at the top of the **Rotas** section.
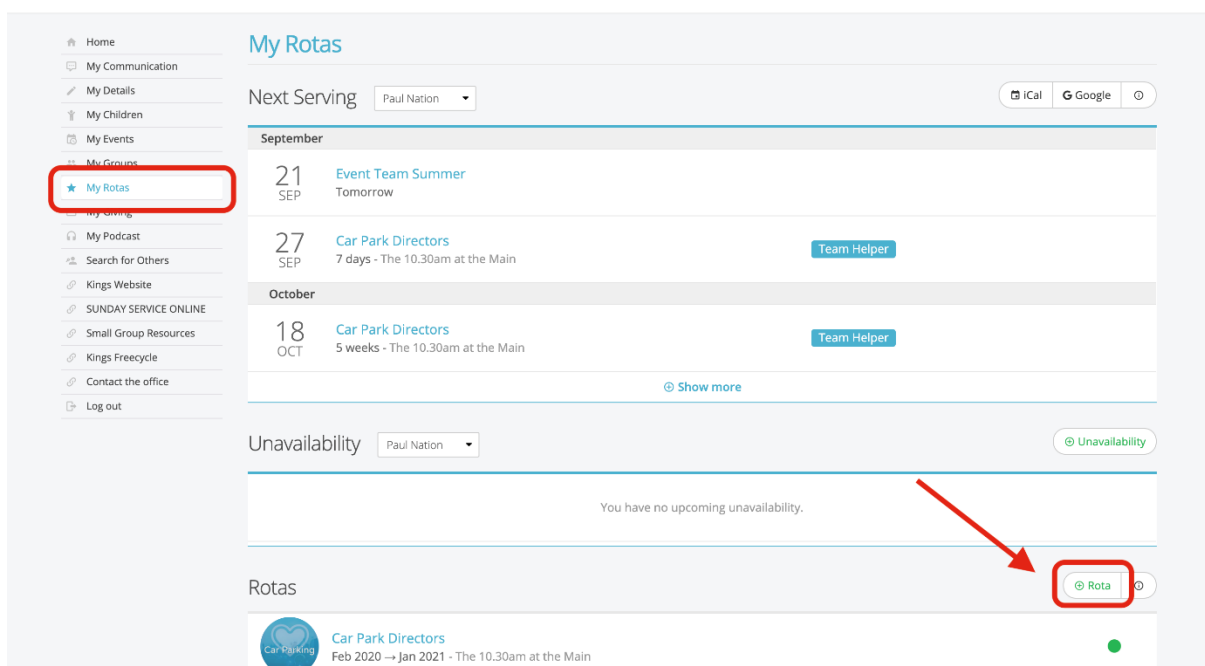
On the **Add Rota** page that opens, select the **Ministry** – only ministries that you oversee are available in the drop-down list. Next, work through each of the rota settings, selecting the **Service** to which the new rota is to be assigned (optional), and the rota **Date** range. Next, set the **Days** that rota members serve and the serving **Times**. You can minimise false rotas

clashes by setting accurate serving times that reflect when your rota members are actually serving. *So, if the worship team usually arrive at 9am for the 10.30am Sunday service, set the serving times to run from 9am and link the rota to your 10.30am service.*

Note the option to disable **Clashes** for a rota - perhaps is a rota serves part way through a service - which will always clash with other rotas e.g. the 'communion' or 'readings' rotas, which typically happen during a service. Finally, enable or disable the rota **Accept/Decline** functionality for the rota as required. If enabled, rota members will be able to accept or decline their rota dates, giving you greater clarity about those serving and where the gaps are that still need filling.

Next, set the rota's **Team Rotation** (the rotation options are explained below) – either **Ad Hoc**, **Simple Rotation** or **Serve 13**. Depending on the rotation selected, further rotation options may be available:

Which Team Rotation?

- **Ad Hoc.** If the ministry doesn't follow any serving pattern, e.g. once per month on the first Sunday, select Ad Hoc. When you add a new rota you'll manually assign people or teams to each date on an ad hoc basis based on their availability.

- **Simple Rotation.** Create any number of teams (a team can have any number of members) 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. It's also possible to exclude teams from the rotation, e.g. a Reserves team.

- **Serve 13.** Four weekly teams serving 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 a year by each weekly team in rotation – during a year each team will typically serve 13 times. You must have four teams to be able to select Serve 13. It's also possible to use Serve 13 with five teams, with Team 5 being assigned to all fifth weeks of the year.

Ticking to **Allow members to sign up to future dates** on the rota – see later in this article for further information about **Rota sign up**.

Scroll down the **Add Rota** page - and click **Save Changes**.

# 2. Adding teams, team members and roles

Introduced briefly in the last section, let's take a moment to look in more details at the ministry's **Teams** section. Within the rota, scroll down and click on the **Teams** tab. Note also the **Roles** tab, where new roles can be added for the ministry and existing roles can be edited and re-ordered. In "Role View" your rota will respect **Roles** order - for example, you may prefer your leader roles to be the first roles listed on your rotas.
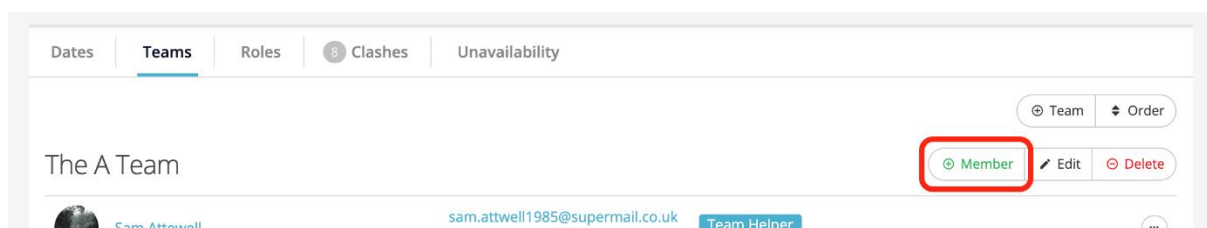

On the **Add member** pop-up, **Search,** and select a person to add to the team and optionally assign their **Roles** as appropriate - roles change from white to your account colour when selected.

You can **Add** or **Edit roles** of team members. Changes made here won't update roles currently assigned on existing rotas but will apply when new

rotas are created and when adding the person to dates on existing rotas *ad hoc*.
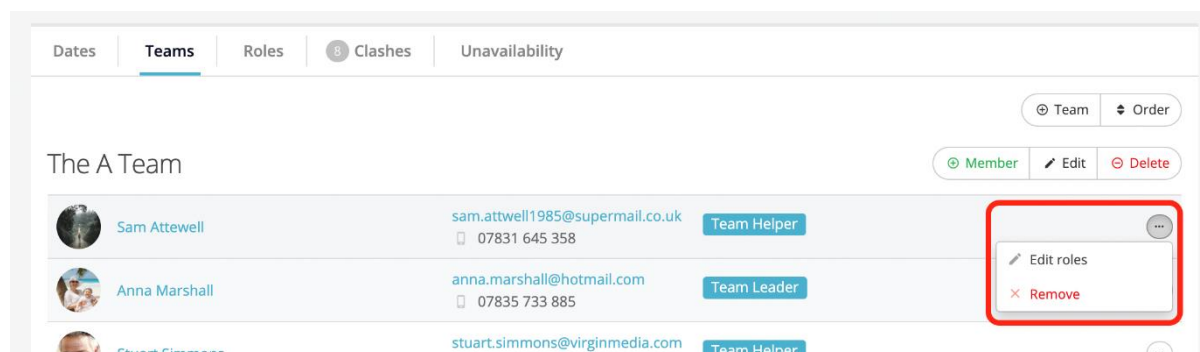
Selected roles will change from white to your account colour. Click **Save Changes** to apply the changes.
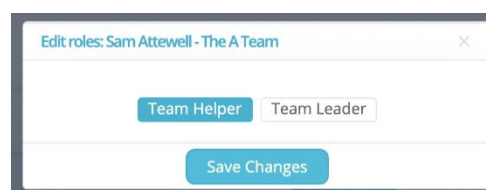

3. Enabling rota sign up

A great feature of ChurchSuite's rota functionality is the ability to create rotas that ministry members can sign up based on their availability. **Rota sign up** is ideal for growing ministry team numbers, filling rota gaps, or publishing an empty or partially completed rota to invite ministry members to sign-up to populate.

You can set a sign-up capacity for **all future dates** on a rota, or **just for certain dates** – perhaps where you know in advance that you'll need extra people serving for a special event or service. Once the sign-up capacity for a rota date has been reached, no further sign-ups to that date are possible. **Rotas sign up** can be enabled on a rota-by-rota basis, giving those overseeing rotas complete flexibility to choose the rota-recruitment method that works best for their ministry. Rota sign-up can also be disabled at any time.

Rotas with **Sign up** *enabled* are distinguished in the rota profile - the profile shows which optional features are enabled for the rota.
Click **Edit** to make changes to a rota's settings and to enable (or disable) rota **Sign up** (and other features).
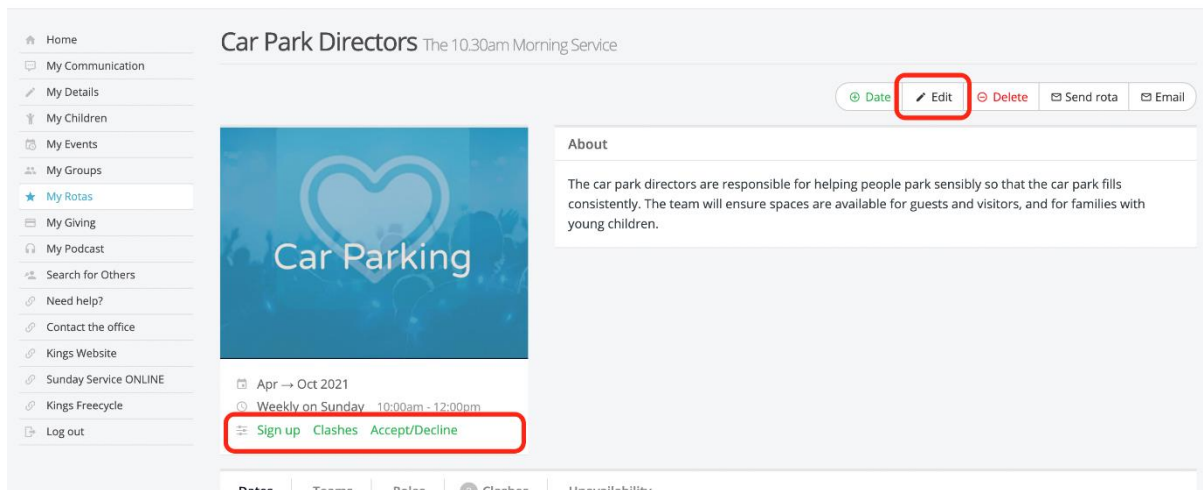
Once rota **Sign up** is enabled, ministry members viewing the rota can click **+ Sign Up** for any rota dates they are not already serving and where there is available capacity. A progress indicator on each rota date shows the current sign-up progress.


Once signed up, a rota member cannot cancel a sign-up, but they can **Organise a swap** or, if 'rota accept/decline' is enabled for the rota, they can **Decline** a previously accepted sign up to a rota date.

4. Publishing and distributing a rota

An information message is displayed at the top of the rota whenever you're working with a **Draft** rota. Click **Publish rota** to change the rota's

status to published. A published rota is visible to the rota's members when they access My ChurchSuite or their personal Rota Page (see section on **Rota Accept/Decline** for further information about the Rota Page).
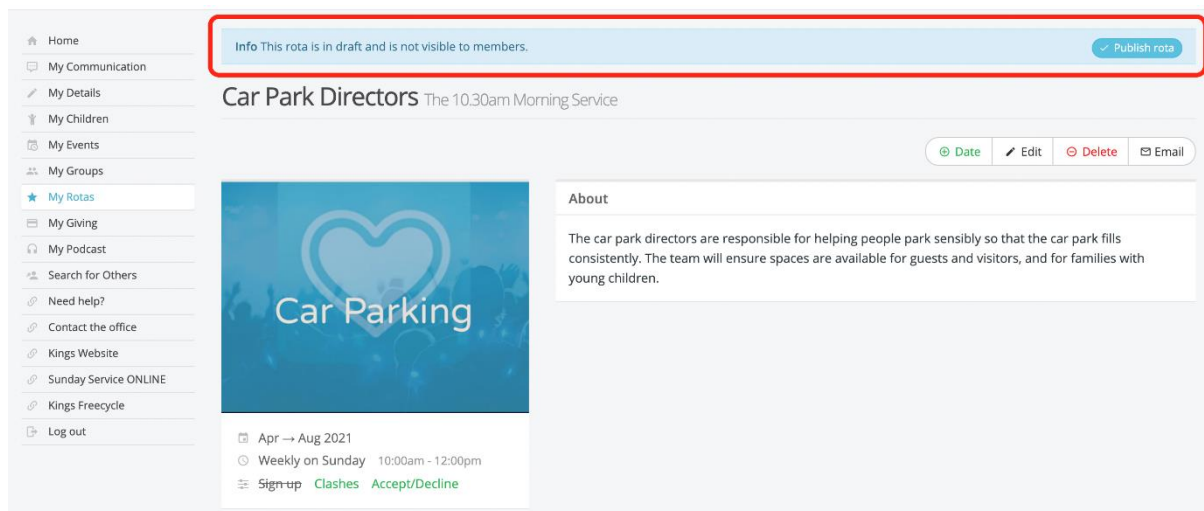
You'll likely now want to let all your rota members know about the newly published rota. Click **Send rota**.
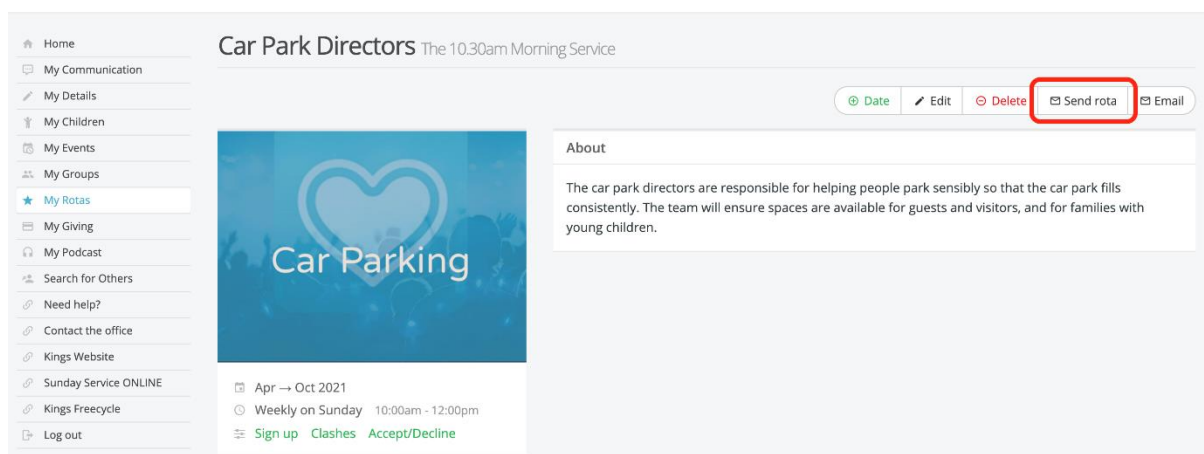
On the **Send rota** pop-up, select the range of rota **Dates** you wish to send and the **Recipients** to be notified. Note the recipient options to send to **All members**, **Not responded** or **Not sent**. Using these options, you can easily re-send previously sent rotas or send to just those rota members that have not been previously sent a rota - ideal if you've made some rota changes and you just want to let the newly added people know, or if you wish to chase up those who've not yet responded. For rotas with **Accept/Decline** enabled, ChurchSuite will visually distinguish the *unsent*, *sent* and *responded to* serving status of each rota member for each rota date.

You can customise the rota email **Subject** and **Message** - including using a *::first_name::* merge field for personalisation of each each email. By default a rota email will contain a curated list of each recipient's rota dates and serving details (the **date list**), but you can optionally tick to **Include the rota grid** and a rota member **contact details** table in the email. When you are ready, click **Send**.

The rota emails are sent - one email per recipient (not one email per member per rota date).

5. Adding people directly to a rota

Begin by clicking **+ Add to date** (or **Add [to role]** - explained later in this section and only surfaced when the rota is viewed *By Role*).

The **Add to date** pop up opens. Either select an existing ministry member from the **People** list or use the **Search** to add a person from outside of the ministry member list - adding *ad hoc* people to rota dates like this does not add them to the underlying ministry **Members** list, just to that rota date. However, you may prefer to make more permanent member changes in the underlying ministry's **Teams** section and apply the change to all future rota dates.
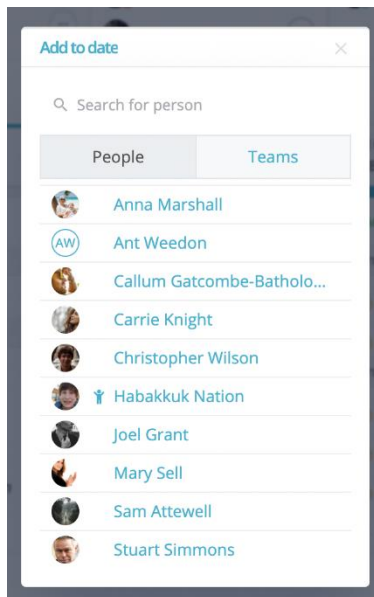
It's also possible to add people directly to roles on rota dates. Hover your cursor over a role and click **Add [to role]**.

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A curated list of available team members who have that role assigned in the underlying ministry's Teams list is provided. Either select from the list or use the **Search** to add someone from outside of the ministry's Teams list.

6. Assigning roles

To add or edit a rota member's role, select **Edit roles** from the Actions menu next to their name. For those without any roles the Action is labelled **Add role**.

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In the **Add role/Edit roles** pop up, select roles from the list - selected roles change from white to your account colour.
Click **Save Changes** once you've made your role selection.

7. Processing accept/decline responses

For rotas with **Accept/Decline** *enabled*, rota members are able to **Accept** and **Decline** their assigned rota dates via their personal **Rota Page** (a Rota Page link is included in their 'Send rota' emails) or from the **My Rotas** section of My ChurchSuite. Ministry overseers can always *Accept* or *Decline* on behalf of any rota member.

The current serving status of each rota member for each rota date is always visible on all rota views. Let's explore the various serving statuses that you might see on your rotas.

- **Pending [unsent]** - where the rota has not yet been sent for that person/date - distinguished un-styled with no icon

- **Sent** - where the rota has been previously sent for that person/date - distinguished italicised with a yellow? icon to indicate you're awaiting a response

- **Accepted** - distinguished un-styled with a green tick icon

- **Declined** - distinguished in red strikethrough font with a red cross icon - hover over the person's name to see the a decline comment optionally added

- **Unavailability** - distinguished in red strikethrough font with a red cross icon - hover over the person's name to see any unavailability comment added

- **Clash** - where a person is serving on other rotas on the same date/time - styled in red font and distinguished with the serving status icons above - hover over the person's name to see details of the other clashing rota/s

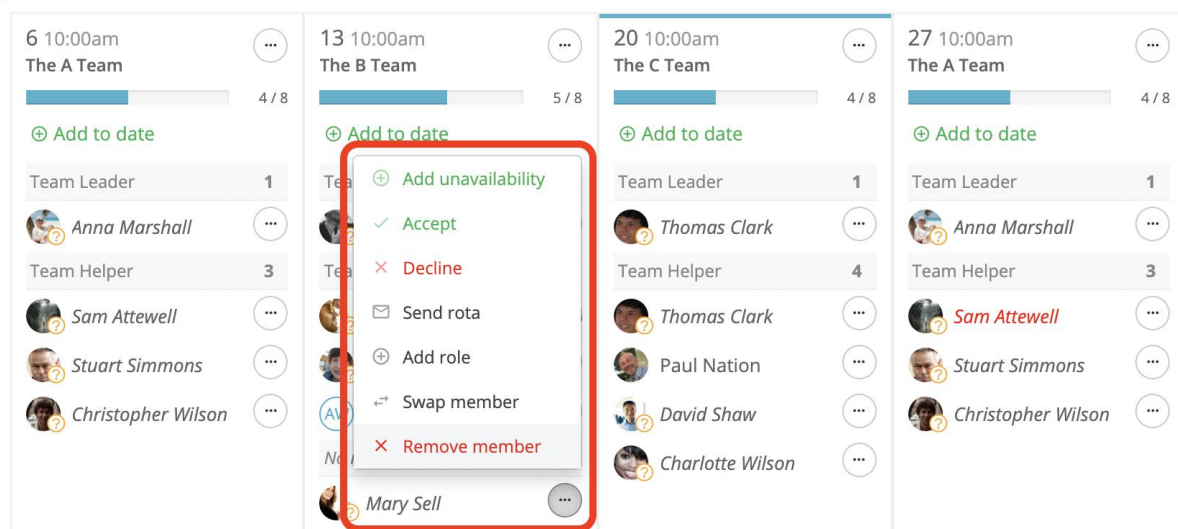- **Child** - distinguished with a child icon before the rota member's name

8. Removing people from a rota

To remove a person from a rota date, click to open the Action menu next to the person's name. You can **Swap member** - and search/select a different person, or you can select **Remove member**.


The **Remove member** pop up opens. In addition to **Removing from [the selected] date**, you can optionally remove the rota member from **All future dates** on the same rota and **Remove from linked ministry** entirely (which will remove them from all teams in the underlying ministry).

Click **Remove Member** to save your changes.

9. Adding rota notes to highlight special dates

Special occasions, like Baptism services, can often catch people out on rotas – extra visitors may mean additional team members are needed. **Rota notes** are rota-specific, allowing you to add a custom message to any rota date, which is visible in all rotas views and included

in rota reminder emails. To add a rota note, select **Edit date** from the **Date's** Actions menu.
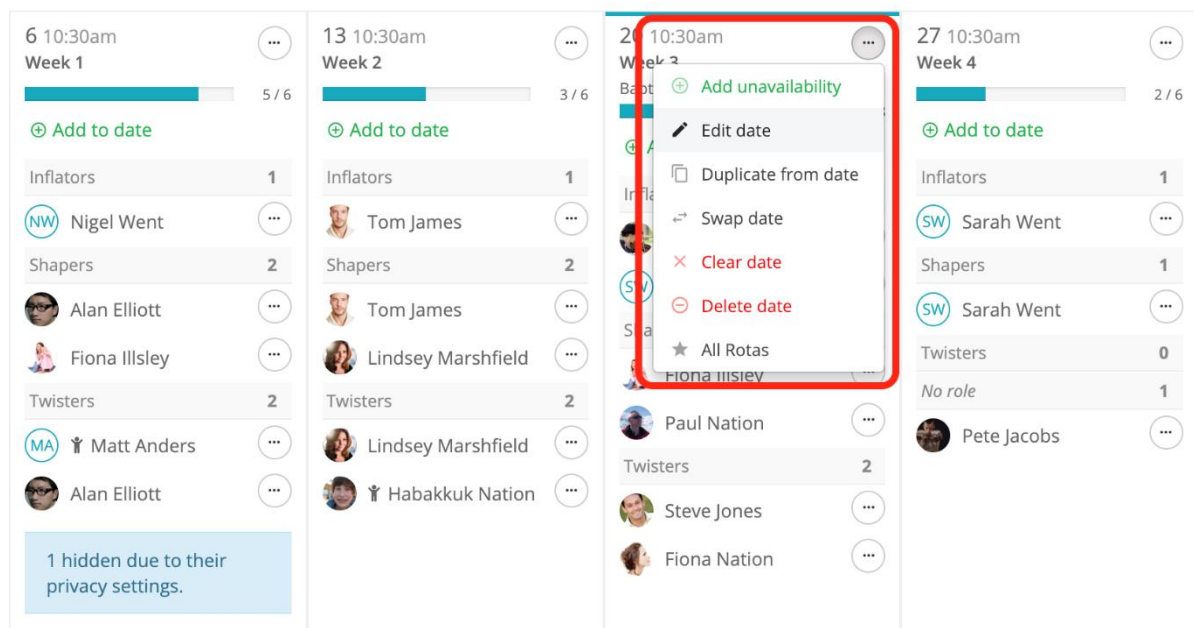
On the **Edit date** pop up, type your note or message in the **Notes** field. You can add multi-line notes (with line breaks) and even include emojis or short URL links if you wish. Click **Save Changes** when finished.

The note is added to the rota date and surfaces on all rota views.

June 2021

| 6 10:00am	13 10:00am	20 10:00am	27 10:00am
The A Team	**The B Team**	**The C Team**	**The A Team**
4 / 8	5 / 8	Baptism Sunday - direct people to overflow car parking first. Keep main car park for guests and visitors. 4 / 8	4 / 8
⊕ Add to date	⊕ Add to date	⊕ Add to date	⊕ Add to date
Team Leader 1	Team Leader 1	Team Leader 1	Team Leader 1
Anna Marshall	Joel Grant	Thomas Clark	Anna Marshall
Team Helper 3	Team Helper 3	Team Helper 4	Team Helper 3
Sam Attewell	Callum Gatcombe-Bat...	Thomas Clark	*Sam Attewell*
Stuart Simmons	⚲ Habakkuk Nation	Paul Nation	Stuart Simmons
Christopher Wilson	(AW) Ant Weedon	David Shaw	Christopher Wilson
	No role 1	Charlotte Wilson	
	Mary Sell		

If a service leader has added a **service note** to a service date (in ChurchSuite), this will also be surfaced on all rotas linked to that service – **service notes are shown** *italicised* **above un-styled rota notes**.

June 2021

6 10:00am	13 10:00am	20 10:00am	27 10:00am
The A Team	**The B Team**	**The C Team**	**The A Team**
4 / 8	5 / 8	*BAPTISM SUNDAY* *Readings: Matthew 3:13-17* *Guest speaker: Gavin Courtney*	4 / 8
		Baptism Sunday - direct people to overflow car parking first. Keep main car park for guests and visitors. 4 / 8	
⊕ Add to date	⊕ Add to date	⊕ Add to date	⊕ Add to date
Team Leader 1	Team Leader 1	Team Leader 1	Team Leader 1
Anna Marshall	Joel Grant	Thomas Clark	Anna Marshall
Team Helper 3	Team Helper 3	Team Helper ⊕ Add 4	Team Helper 3
Sam Attewell	Callum Gatcombe-Bat...	Thomas Clark	*Sam Attewell*
Stuart Simmons	⚲ Habakkuk Nation	Paul Nation	Stuart Simmons
Christopher Wilson	(AW) Ant Weedon	David Shaw	Christopher Wilson
	No role 1	David Shaw	
	Mary Sell	Charlotte Wilson	

10. Adding dates to a rota

You can easily add additional dates to a rota. Dates can only be added individually - it's intended that 'follow on' rotas are created for the next season as a rota is ending, rather than endlessly extending existing rotas. Overseers receive rota expiry reminders in the weeks leading up to the final dates on a rota; prompting you that a new 'follow on' rota is needed. However, to add a date to a rota - perhaps for a special event - click the **+ Date** button at the top of the rota page.
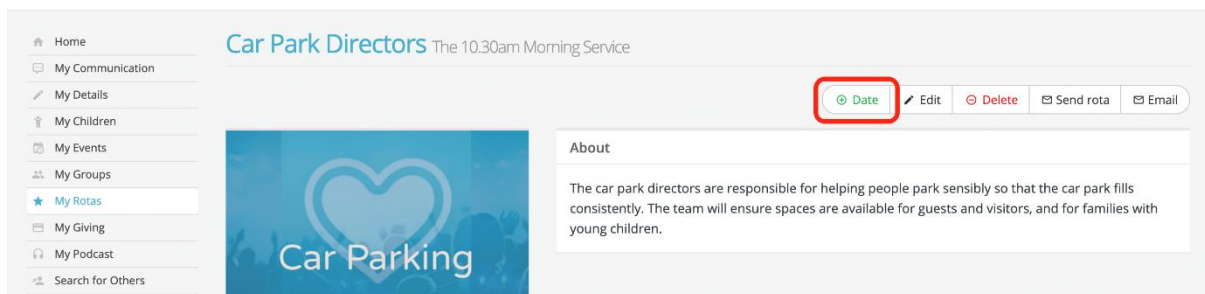
On the **Add date** pop up, enter the **Date to add** and **Start Time** and any optional rota **Notes**. If **Rota sign up** is enabled, set the **Maximum sign-ups** for the date being added. Click **Add Date** to save the changes.

The new date is added to the rota ready for you to assign people.

11. Removing dates from a rota

Removing dates from a rota will also remove all rota members and their assigned role(s) for that date. You have two options...

You can either *clear* the rota date, which will remove all members for that date and leave the date in place on the rota; or you can *remove* the date entirely. Neither of these changes make any changes to your underlying ministry **Teams** list. Before deleting a date it may be helpful to consider what your rota members expect to see when they're viewing their rota. A deleted (missing) date may be confusing to them, but an empty date with a suitable rota Note added may be clearer.

From the **Date** Actions menu, select **Clear date** or **Delete date** as appropriate. You'll be asked to confirm the change.