Rotas

Introduction

Using **church**insight to produce your church duty rotas not only helps you to communicate effectively with your members, it also helps you to avoid conflicting commitments and reduce time-consuming preparation.

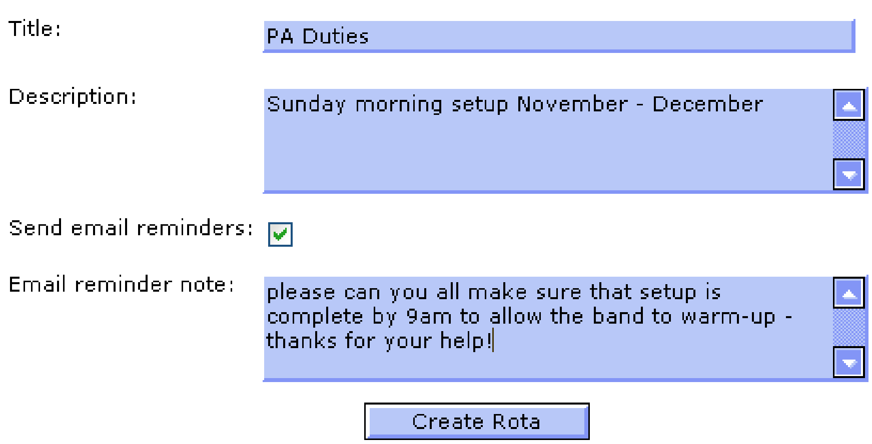
This quick start guide shows you how to create a rota and then send that rota out to the people involved.

Creating a rota

- If you haven't logged into the web site already, do so now. Click the **Login** link at the top of the home page and enter the login name and password as supplied.
- Once you have successfully logged in click the **web office** link at the top of the home page. The Web Office will be displayed shortly afterwards.
- Select a **group folder** associated with the rota duties. For example if you are creating a PA rota click on the **PA** group.
- Select the **Rotas** tab to display the current list of rotas in this group.

Not sure what a group folder is? Rotas tab not available? For more help see the quick start guide called "Web Office Tour".

- Click the **Add a rota to the** *groupname* **group** task at the bottom of the work pane.
- Enter the details of the new rota as follows:



Note: enabling email reminders allows you to automatically send a reminder to each person on duty for a particular event. The day they receive this email depends on their rota reminder settings (found in the **my rotas** area)

- Click the **create rota** button to complete the process. A new blank rota will appear in the **editing** folder shortly afterwards.

Adding duties to your rota

Once you have created a new rota, you can add duties to it as follows:

- Open the new rota you have just created by clicking on the title in the **editing** tray.
- **Step 1 – add the tasks -** each task in your rota is represented by a column; you can add additional columns as follows:
  - Click the **Add a new column in the** *rotaname* **rota**.
  - Enter a title for that task then click **create**.
  - Continue adding task columns until your rota is complete.
- **Step 2 – Add the events** - add the events from your calendar to the rota as follows:
  - Click the **Add a new event to the** *rotaname* **rota** task. Your church calendar will appear in a new window shortly afterwards.
  - Click on an event title to add it to the rota; continue adding events until the rota is complete.
  - Click the button to close the events browser.
- **Step 3 – add the people**

  Each box in the rota now represents a task at an event. You can add one (or more) people to that task as follows:
  - Click the button to add a person.
  - A new window will open where you can either select from people already featured on the rota or add someone else. Initially this list will be empty. Click the **browse members** button to browse your church database.
  - Click on a name to add that person to the **selected** list. Once you have finished selecting names click the **select records** button to add these people to the rota.
  - If necessary add notes specific to the task at this event by clicking the button.
  - Continue to add people to the tasks for each event until the rota is complete.
  - Click the **rotas** tab to return to the rotas view.

  > **Note:** In some cases you may be using the same team of people to do the same tasks at multiple events. You can save time assembling your rota by *copying* rows of people to another event. Click the button on the row you wish to copy then select an event from the calendar to copy it to.
- **Step 4 – publish the rota!** – now that your rota is complete you can make it available to everyone involved. Click the button next to the rota title in the **intray** to move it to the **published** folder.
- **Step 5 – send copies of the rota** – you can send copies of the rota to all participants using the most appropriate communication method as follows:
  - Open the rota by clicking on the rota title.
  - Click the **Send copies of the** *rotaname* **rota to participants**.
  - A list of recipients will be displayed; next to each name either **send email** or **printed copy** will be ticked depending on the preferred correspondence method they have selected in **my profile**. Edit these preferences if necessary.

- Compose an email to accompany details of the rota.
- Click **OK** to send the emails.
- An Adobe portable document (.pdf) will be created containing cover letters and copies of the rota for each of the participants receiving the information by post. Click on the document to display it in a new window or right-click and select **save target as…** to save it to your hard disk.