

A Quick Guide for Overseers of ChurchSuite Rotas

Robert Smith

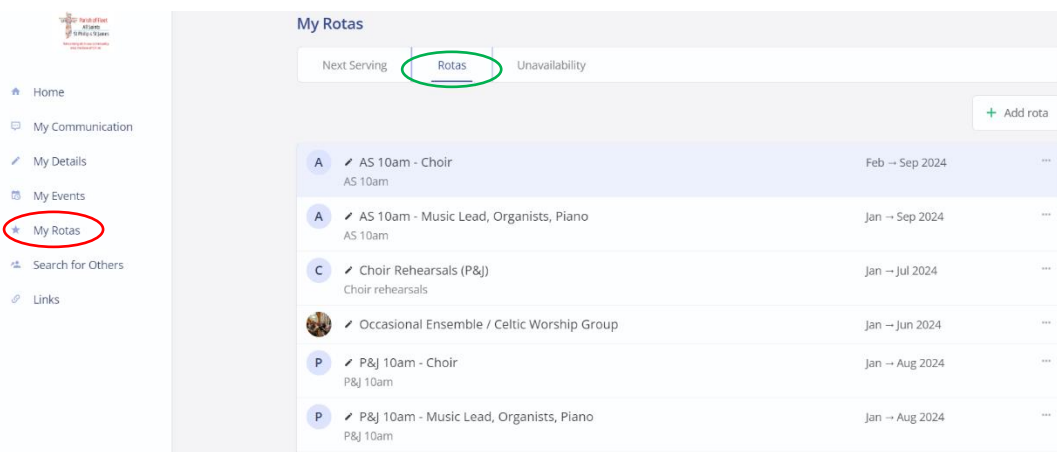
The Overseer role

All the rotas already exist. The Overseer of a rota does not have to create the rota or add future dates to it; that will be done for them. All the Overseer needs to do is:

- populate the future duty dates with the right number of people,
- send the rota (by ChurchSuite email) to all the members of the relevant 'ministry' who are on the rota,
- arrange or record a swap for a ministry member if they do not feel able to make the swap on ChurchSuite and (ideally) make the change on any hard copies on noticeboards (or ask the member concerned to do this),
- add unavailabilities for people who prefer not to do this themselves.

Starting My ChurchSuite rotas

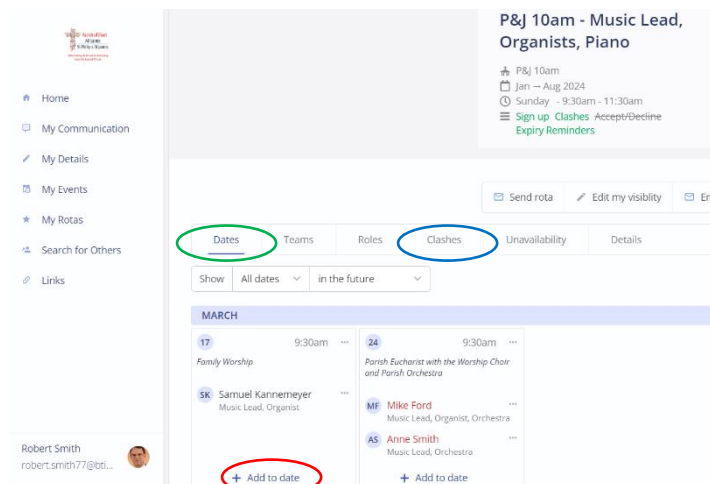
Log into My ChurchSuite using your personal login. Select '**My Rotas**' in left-hand side menu and then the **Rotas** tab at the top.



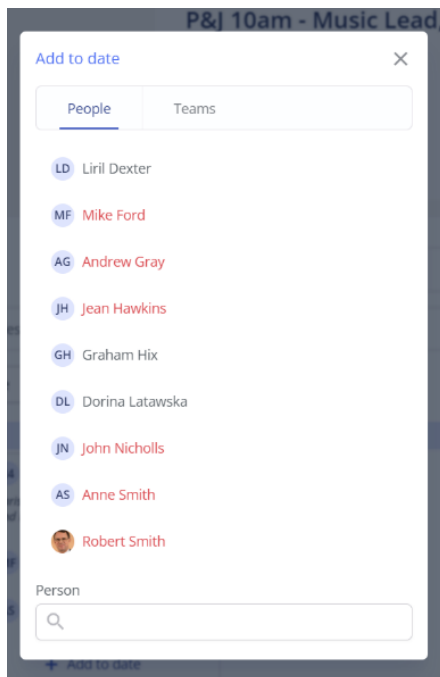
You will see all the rotas on which you are listed, including the one for which you are Overseer.

Populating future dates on a rota

Select the rota for which you are the Overseer by moving the mouse cursor over it (the cursor should change to a hand) and clicking the left mouse button. You should see the rota and the **Dates** tab...

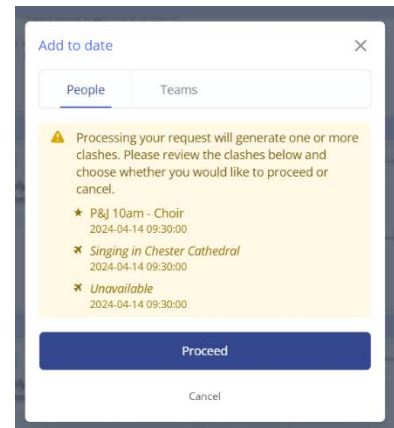


For each date with insufficient people on duty, click left on the '**+ Add to Date**' symbol at the bottom of the date box. This will bring up a selection of names to choose from...



People with names in red have already been selected for a rota with a potential clash at the same time as you are assigning them a duty. If you select a person whose name is in red, you will be told what rota the clash is with (see below-right) and you can decide whether that is acceptable. If it is, click 'Proceed', if not, click 'Cancel' and choose someone else.

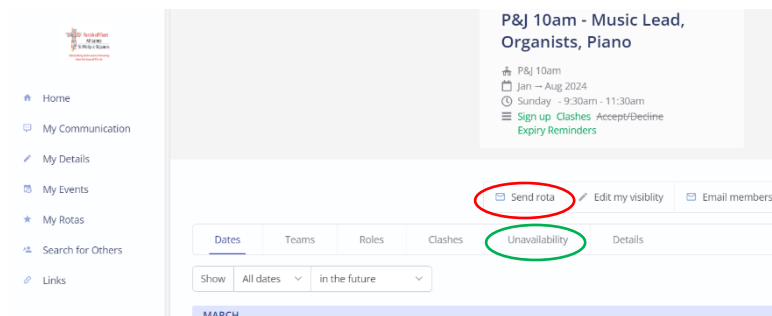
Note that many clashes are *acceptable*, such as 'Reader' and 'Choir', or 'Welcomer' and 'Intercessor', whilst others are *not*, such as 'AV' and 'Coffee', or 'Choir' and 'Chalice Assistant', or an 'unavailable' entry!



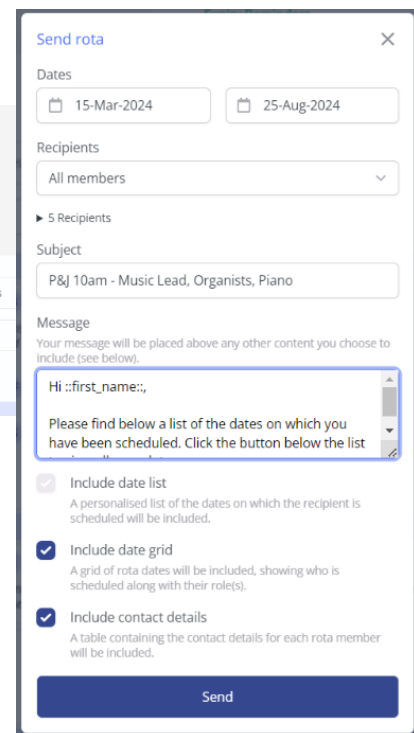
When you have filled all the duties (or at any stage), you can check all clashes by pressing the 'Clashes' tab (see blue ellipse on previous page).

Send a rota to members

Select 'Send Rota' from the horizontal menu...



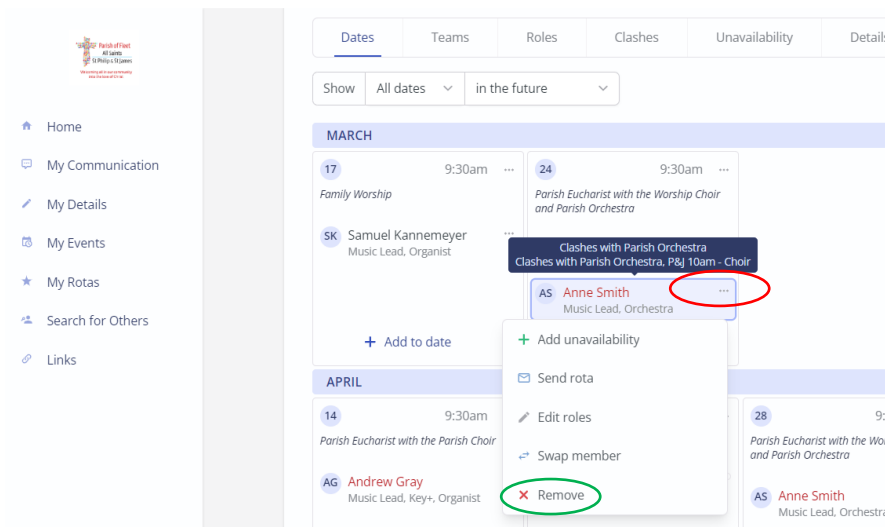
This will bring up the 'Send Rota' window where you can prepare your email for sending the rota to all members. Choose the date range that you want to send, send to 'All members' (but be aware some may not have an email address), 'Subject' should be fine, as should the message but feel free to add to the bottom of it. Check the 'Include Date Grid' because that is the actual full rota and choose whether to 'include contact details' for all rota members, but these details will only be shown based on the person's privacy settings in their ChurchSuite account. When you are happy, press 'Send'. If you want to cancel and not send it, use the 'X' (cancel) button top-right.



Arranging a swap

A member of a rota can organise their own swap in My ChurchSuite and there is a useful document saying how to do this [here](#).

If they prefer you to make the swap then just go into the rota concerned, as above, and remove one person from the date by clicking the ellipsis '...' to the right of the name and selecting 'Remove'.



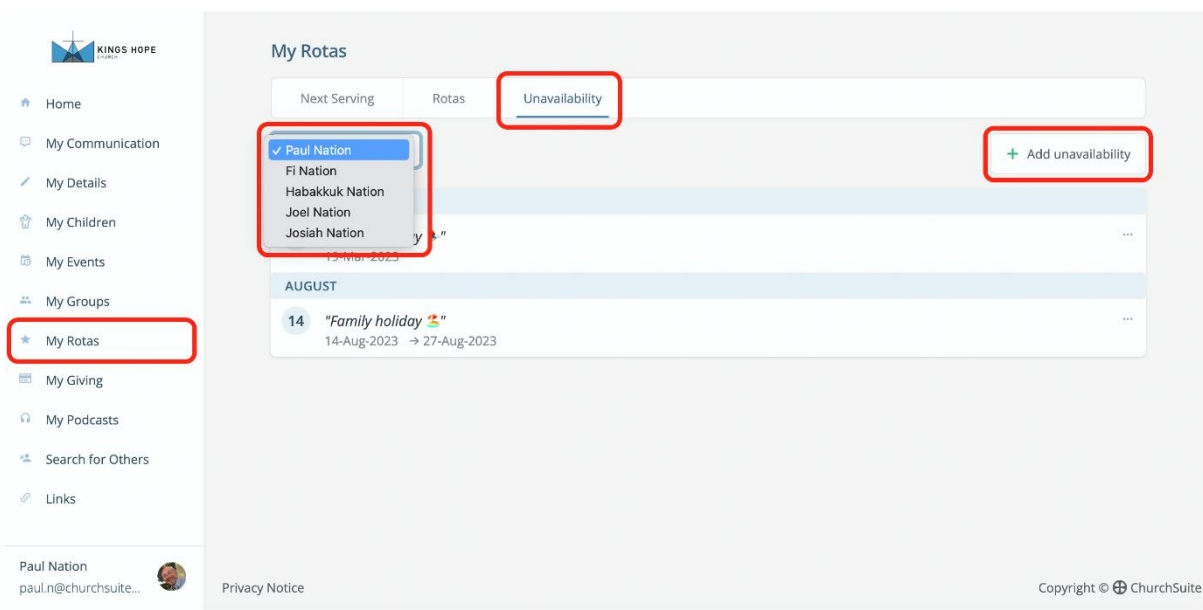
Then add the new person by doing '+Add to Date', as before.

Adding an Unavailability

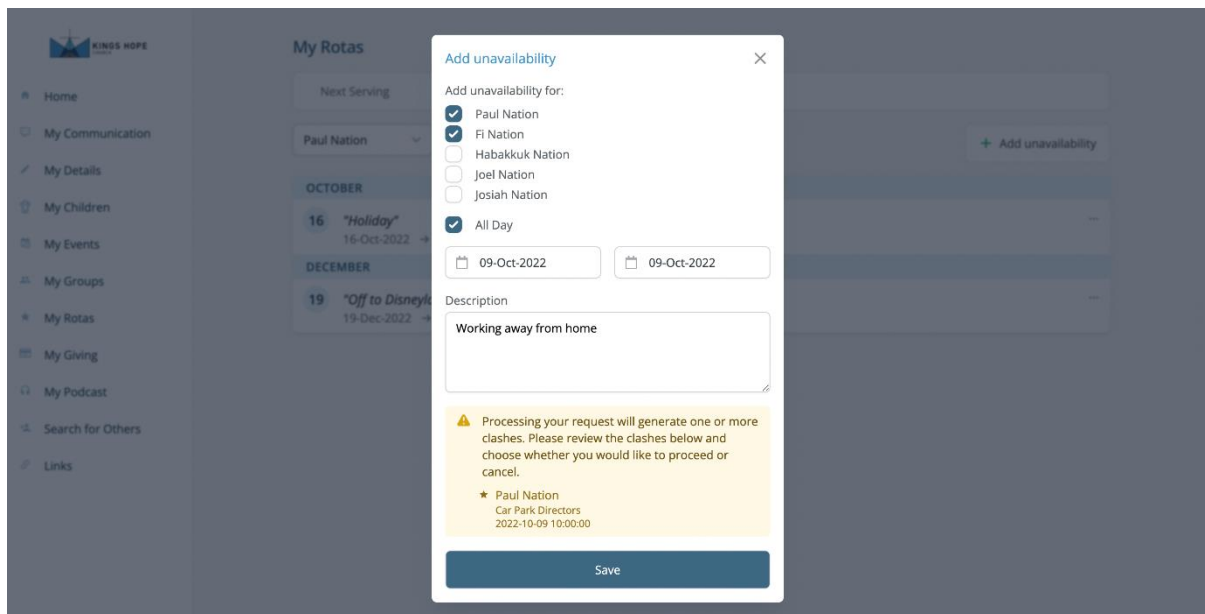
A member of a rota can register their own unavailabilities in My ChurchSuite and this is how:

Adding unavailability in My ChurchSuite (Rota members)

Rota members can access their personal **Unavailability** list in the My Rotas section of My ChurchSuite, listing future unavailability. Rota members may also be able to view and manage the unavailability of their linked spouse/partner and children. To add unavailability click **Add unavailability**.



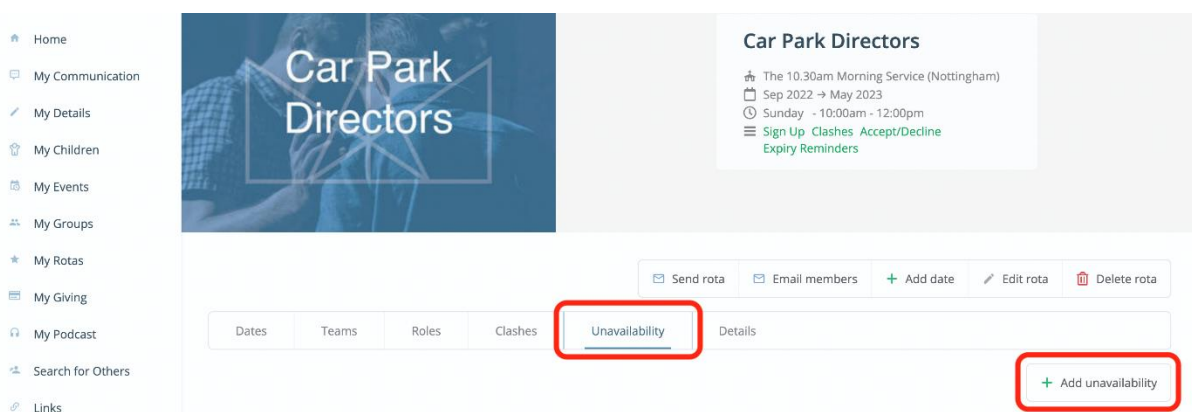
On the **Add unavailability** pop-up, rota members can add unavailability for a range of **Dates** and an optional **Description** (reason), for themselves and/or their linked spouse/partner and children. Any clashes arising from family unavailability are shown within the pop-up, alerting the rota member if they or other family members need to organise a swap. Designated ministry overseers for any rotas affected by an unavailability clash on their rota will receive an unavailability clash notification.



However, if they want you to do it as Overseer, this is how to do it in My ChurchSuite:

Adding unavailability in My ChurchSuite (Overseers)

To add unavailability - working from the rota "View" **Unavailability** tab - click **Add unavailability**.



On the **Add unavailability** pop-up, select the rota **Member** name from the drop-down list. Enter the range of unavailable **Dates**. Any rota clashes caused for any rota are shown. Click **Save** to complete the process.

