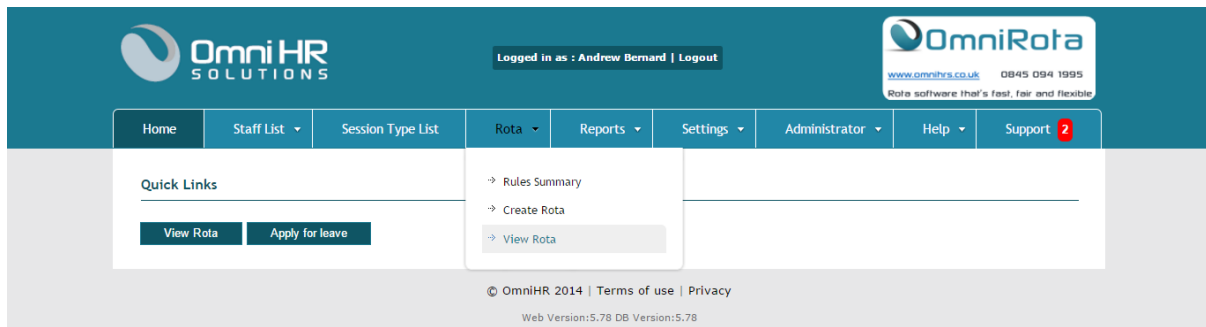# Viewing and Distributing your Rota

These instructions take you through the basics of viewing and distributing your new OmniRota.
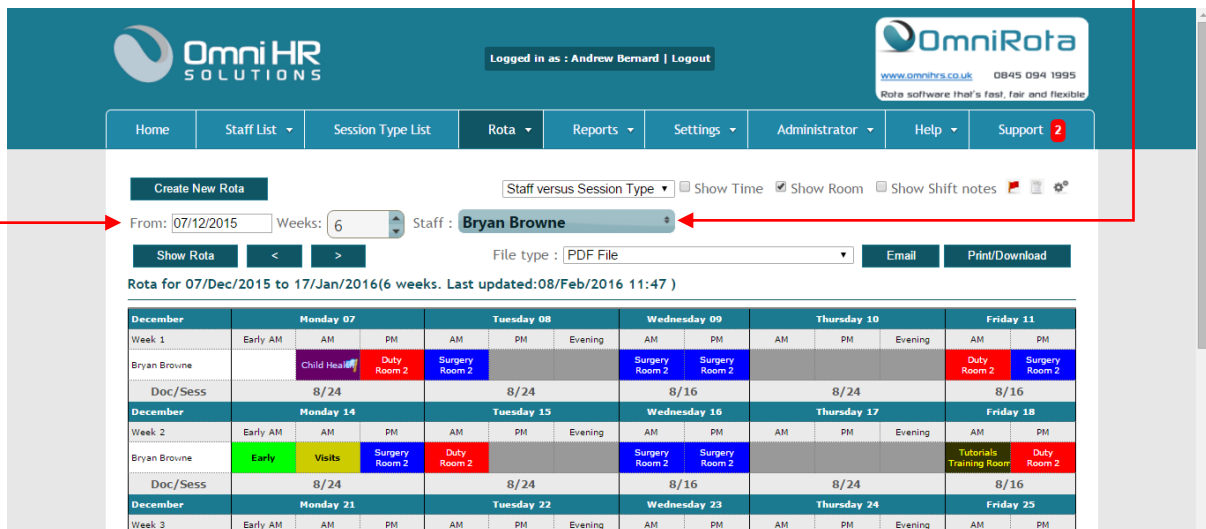
Viewing Your Rota

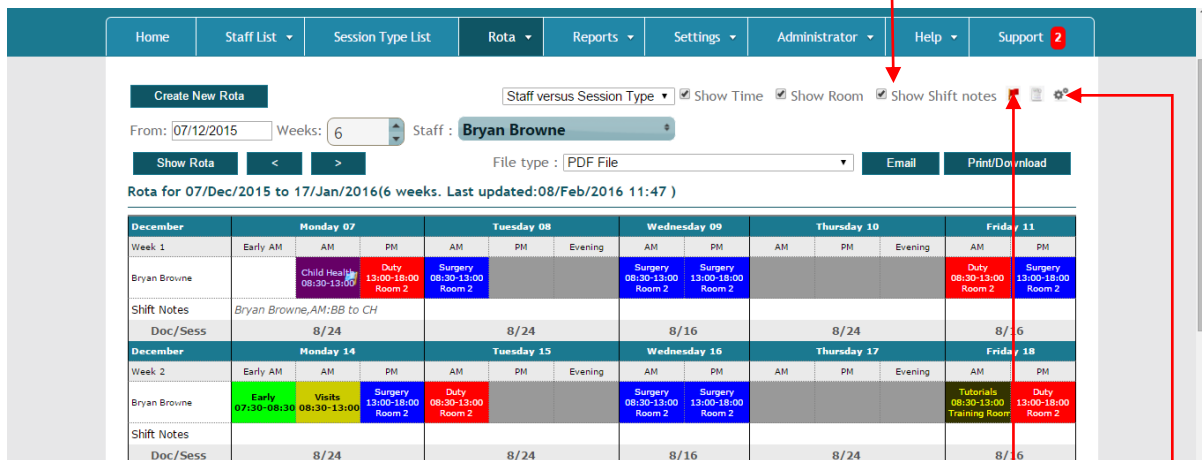To view your current rota select 'Rota', 'View Rota':

There are various changes that can be made to the displayed rota:

- To change the time period on display, select a different from date and/or number of weeks.
- To view for fewer than every staff member, select relevant staff members only.

After each change, click 'Show Rota' for the changes to take effect.

Times of sessions, room allocation and shift notes can all be displayed by ticking the relevant boxes:

You can view current exceptions by clicking the red flag.
Further customisation options are available in the 'Rota Settings' menu available by clicking the cog wheel.

Rota Settings

The main settings control how your rota works. It is inadvisable to change these settings without first seeking our advice.
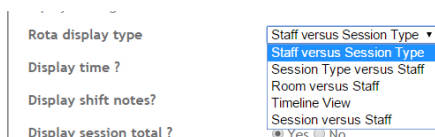
Display Settings are found in the second box down:

Rota display type: Set the default rota view from the available options below:
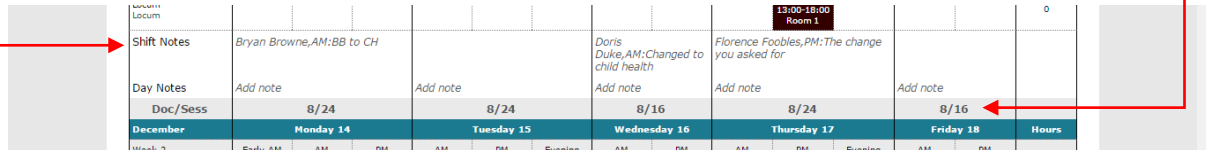
Display time: shows the start and end time of each session on the rota.

Display shift notes: shows any notes you have made whilst making manual changes in a separate row below the final staff member.

Display session total: shows the total number of sessions worked each day and the number of doctors working them. This can be used in conjunction with 'Exclude sessions from total'. See below.

Locum Locum					13:00-18:00 Room 1		0
Shift Notes	Bryan Browne,AM:BB to CH			Doris Duke,AM:Changed to child health	Florence Foobles,PM:The change you asked for		
Day Notes	Add note		Add note	Add note	Add note	Add note	
Doc/Sess	8/24		8/24	8/16	8/24	8/16	
December	Monday 14		Tuesday 15	Wednesday 16	Thursday 17	Friday 18	Hours
Week 2	Early AM	AM	PM	AM	PM	Evening	AM	PM	AM	PM	Evening	AM	PM

Display appointments: if you have specified a number of appointments associated with each session then this option allows you to display the number of appointments on the face of the rota.

Excluded sessions from total: this feature can be used to exclude sessions from the 'Display session total' facility above. This is particularly useful to check that you are fulfilling requirements to provide extended hours cover since you can exclude all sessions except those that qualify as extended hours. You will nearly always want to exclude sessions such as 'Off' and 'Leave' since you will want the total to display the number of doctors actually working that day.

Sessions to count as half: again, this feature is used in conjunction with 'Display session total'. If particular sessions count as only half a session then they can be selected here.

Excluded sessions from rota: select any session types that you do not wish to appear on the 'Session Type vs Staff' view of your rota.

Sessions in room print: this feature enables the selected sessions to be listed along with the room names in the 'Room versus Staff' view. It is useful for sessions like 'Leave' which will not be allocated to any room.

Show room unassigned sessions: allows you to choose whether a room assigned no sessions will be displayed in the 'Room vs Staff' view.

Show no rule flag: displays a flag symbol on any session which has been manually changed.

Show staff member on same line: ticking 'Yes' will mean that in the Session Type vs Staff view, each staff member will be shown on their own line.

Excluded shifts: select any shifts which you do not wish to appear on the rota.

Show weekly hours: if you have specified a number of hours for each session within the rules then this feature allows you to view this information on your rota.

Display rule info: selecting this feature enables you to see the rule information relating to each session on the rota when you hover over it with your pointer.

Display Room: shows the allocated room for each session on the rota.

Display day notes: allows you to add notes relevant to each day shown on a separate row below 'Shift Notes'. See above. Add a 'Day Note' by clicking on 'Add note':

Display shift total: shows the total number of staff covering sessions that day less those fulfilling only session excluded in 'Exclude sessions from total' above and less staff excluded in 'Exclude staff and their sessions from total' and 'Exclude staff from total' below.

Display staff name: shows the staff name in 'Room vs Staff' view irrespective of whether that person is the room owner.

Exclude staff and their sessions from total: allows you to exclude staff members from the total shown in 'Display shift total' above and also exclude the sessions they work from 'Display session total' above.

Exclude staff from total: allows you to exclude staff members from 'Display shift total' above.

Excluded sessions from ICS: sessions selected here are excluded from the ICS file which is downloaded to diaries. It is useful for sessions such as 'Off' which do not normally need to be added to staff diaries.

Sessions to show only time: selecting this feature will remove the label from a session on the rota and show the time only e.g. Surgery 9.00-12.30 would display only 9.00-12.30 whilst maintaining the format.

Show rule warning: selecting this option will display a warning of any rules that you are about to break by making a manual change to your rota.

Display staff type: shows staff type (partner, salaried etc.) next to staff name on rota.

Show + sign: selecting this option will display a + sign in empty sessions in Session Type vs Staff view which can be clicked in order to add new sessions in that slot.

Restrict staff view until: allows you to set a date after which staff will not be able to view the rota. This is useful if your rota is work in progress as it prevents staff from raising concerns about a rota upon which you are still working.

PDF Settings in the third box allow you to control how your rota will look when it is printed out:

In the final section you can change the order in which Staff, Session Types and Rooms will appear on your rota:

Whenever you have finished making changes to your rota settings, click 'Save and View Rota' to save your changes and view your rota again.

Distributing your Rota

Distribution of your rota can be carried out in several ways.

Printing: Select 'PDF File' from the dropdown and click 'Print/Download' to print your rota in accordance with the PDF settings specified above.


To download in any of the other formats specified select the appropriate format from the dropdown and click 'Email'. The rota will be emailed to staff who have an email set up in the system and pushed to calendars of staff who have that format of calendar set up and associated with that email address.

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All staff can also be granted a log in ID which will enable them to view the rota from any browser equipped device. To create a log in ID for a staff member go to the 'Administrator' menu and select 'Users':
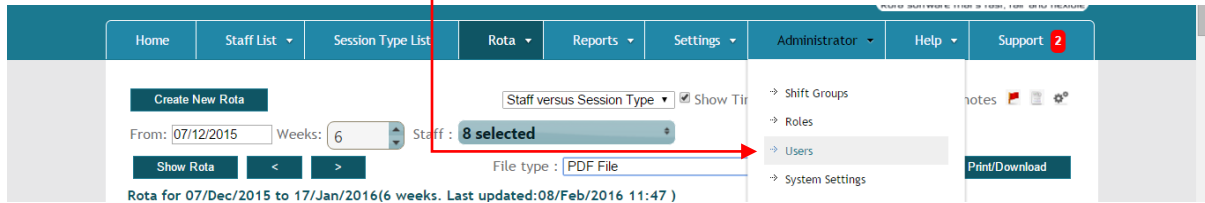
Click the '+' icon to add a new user.

From the window that opens, specify the user's Name, Email Address and Password and select a role for that user. A 'Rota Administrator' will have full edit rights to your rota so is usually limited to one or maximum of two such users. A 'Staff Member' can view their rota and apply for leave but cannot make changes to the rota.
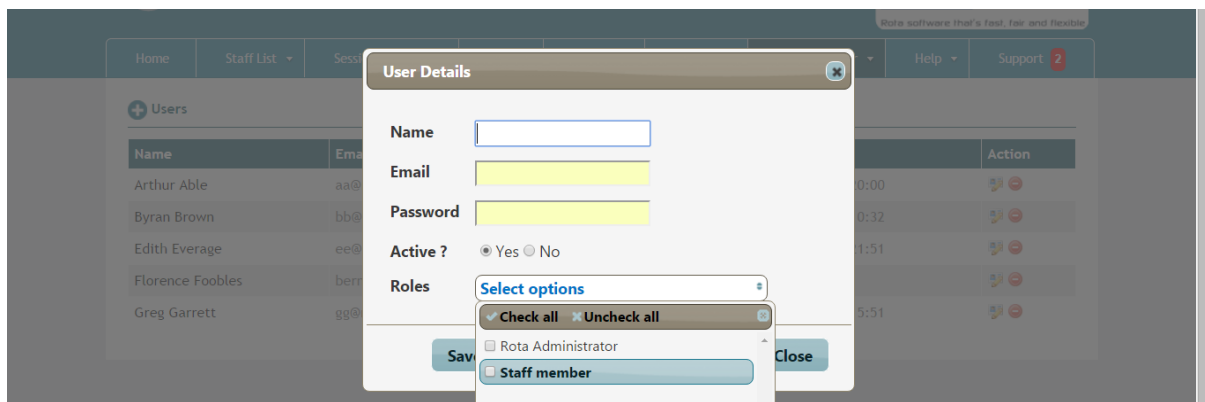
Click 'Save and Close' and the User ID has been set up for that staff member.