How to Create a New Rota Filter

Domiciliary Roster · https://cclearninghub.co.uk/docs/how-to-create-a-new-rota-filter/

How to Create a New Rota Filter



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This guide explains how to create and apply Rota Filters within the Cloud Roster system. Rota Filters allow you to customise the rota view so you can focus only on the staff, clients, roles, or service groups that are relevant to you.

By building and saving filters, you can quickly narrow or widen results using specific criteria, wildcards, and AND/OR logic. This makes it easier to manage large rotas, identify the information you need, and switch between different operational views without manually adjusting the screen each time.

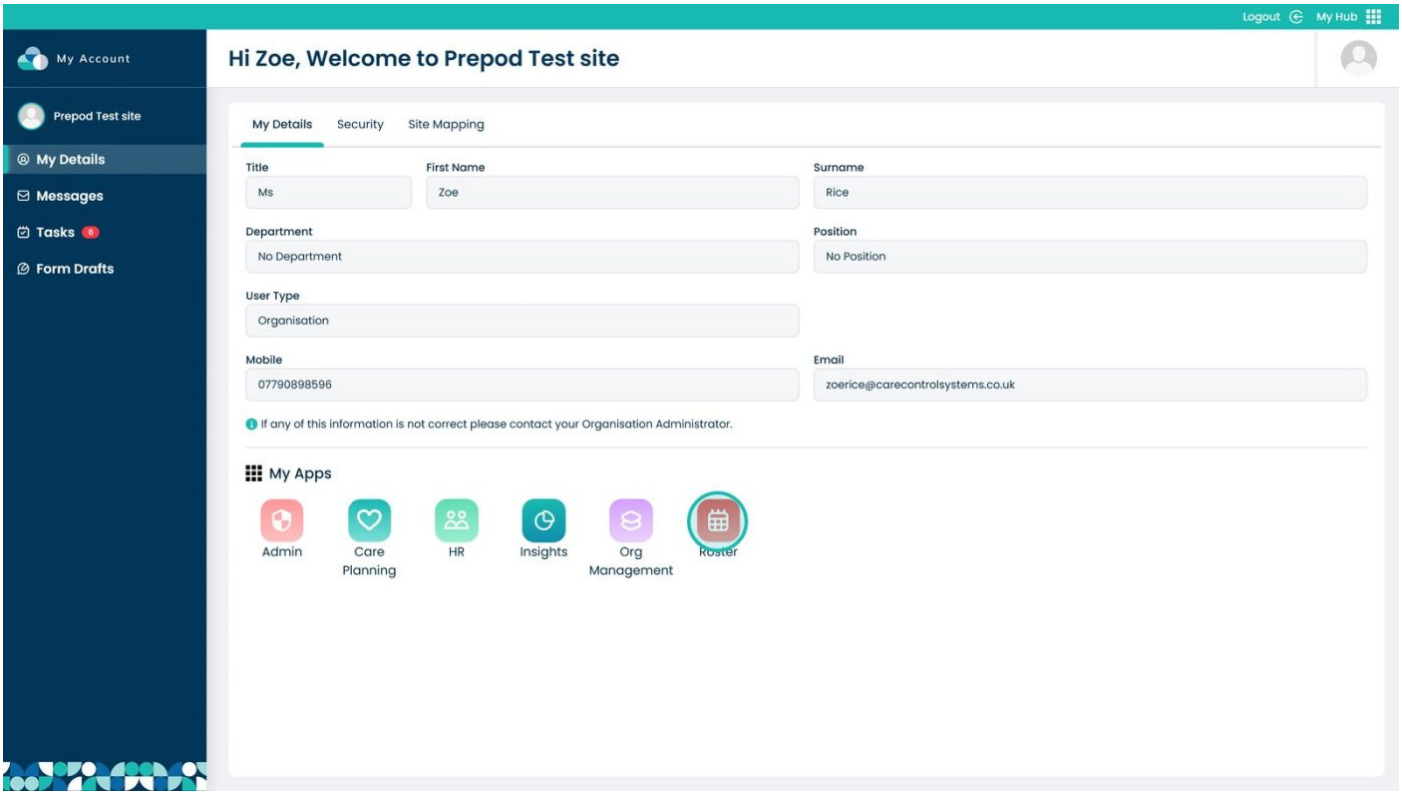
Interactive Guide

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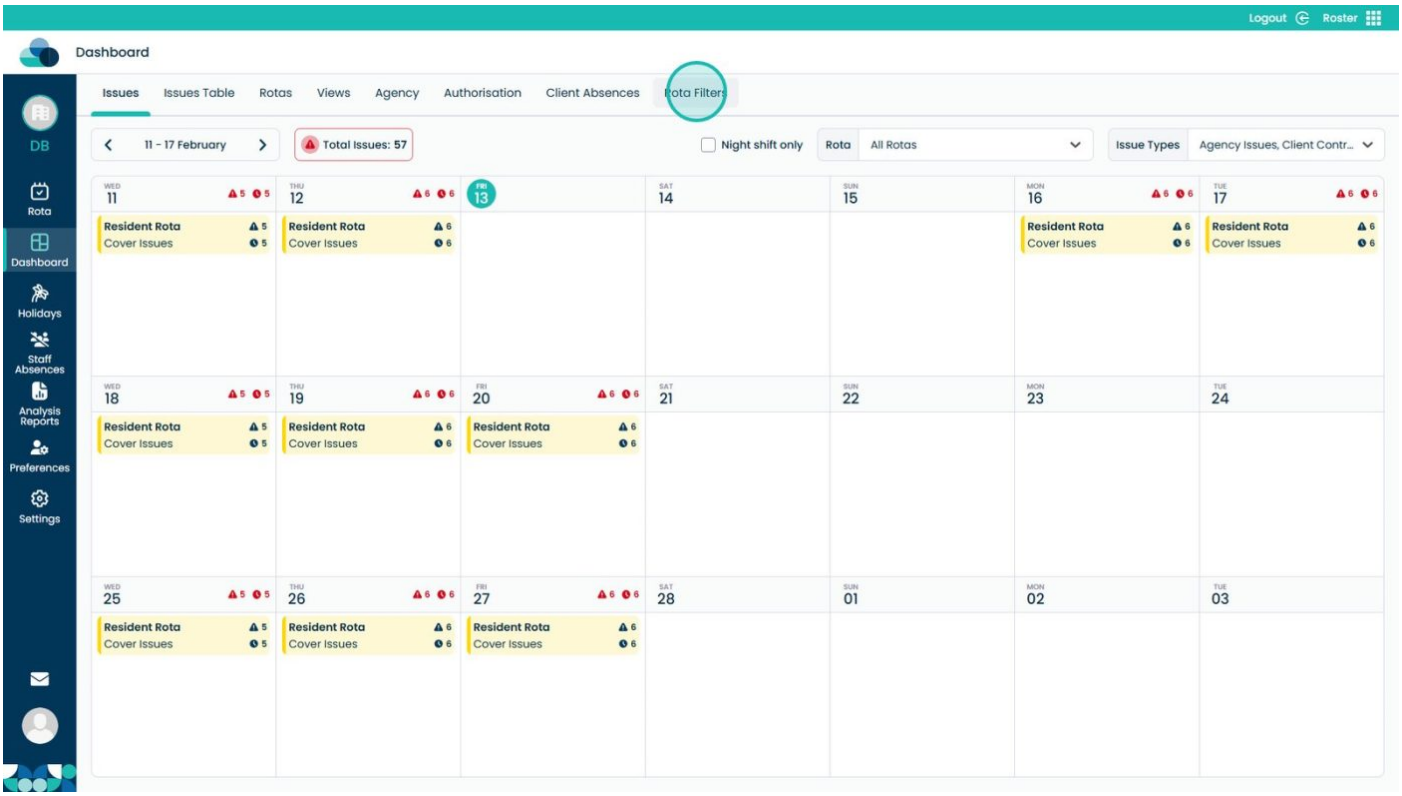
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Text based guide

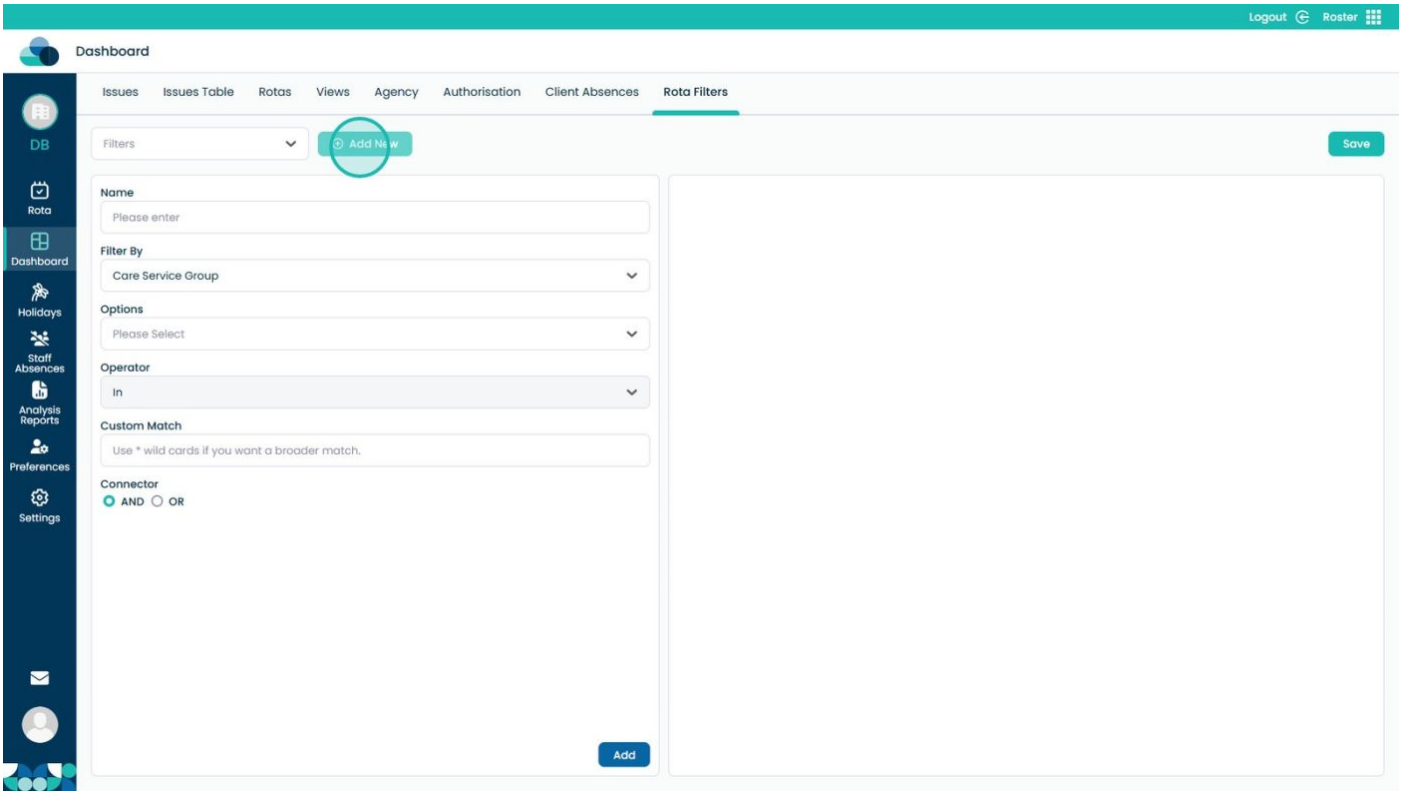
Enter the Roster app



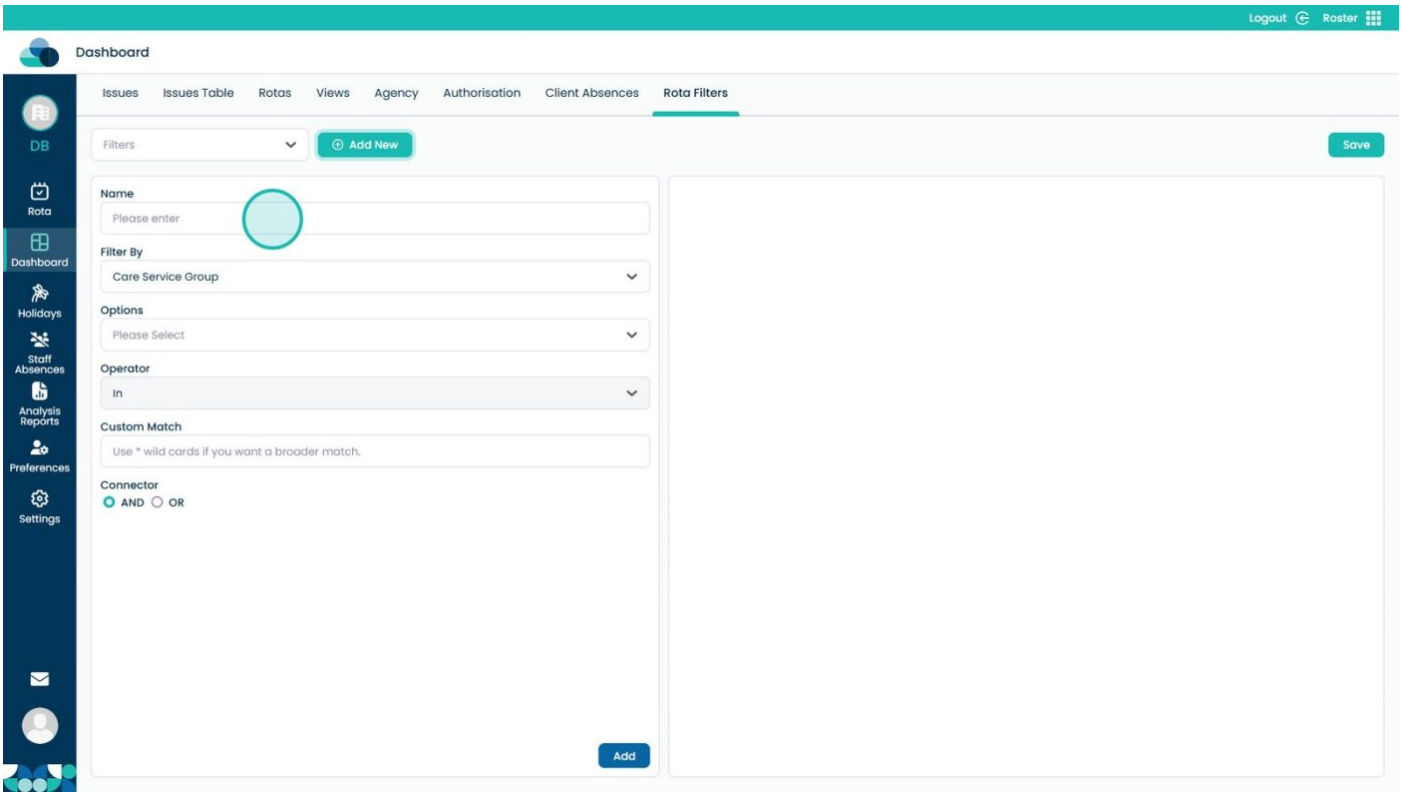
Select Rota Filters from the tabs at the top of the page



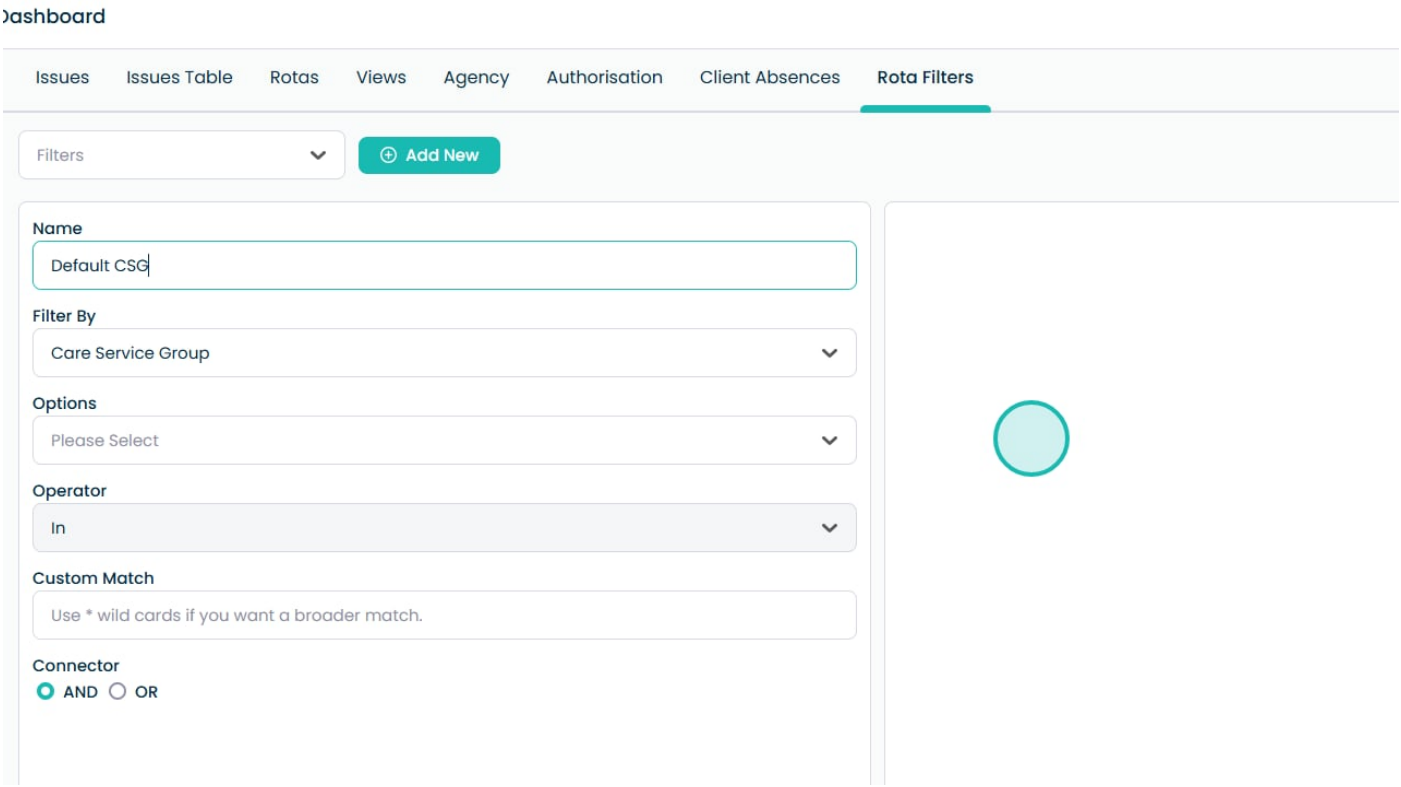
Click Add New



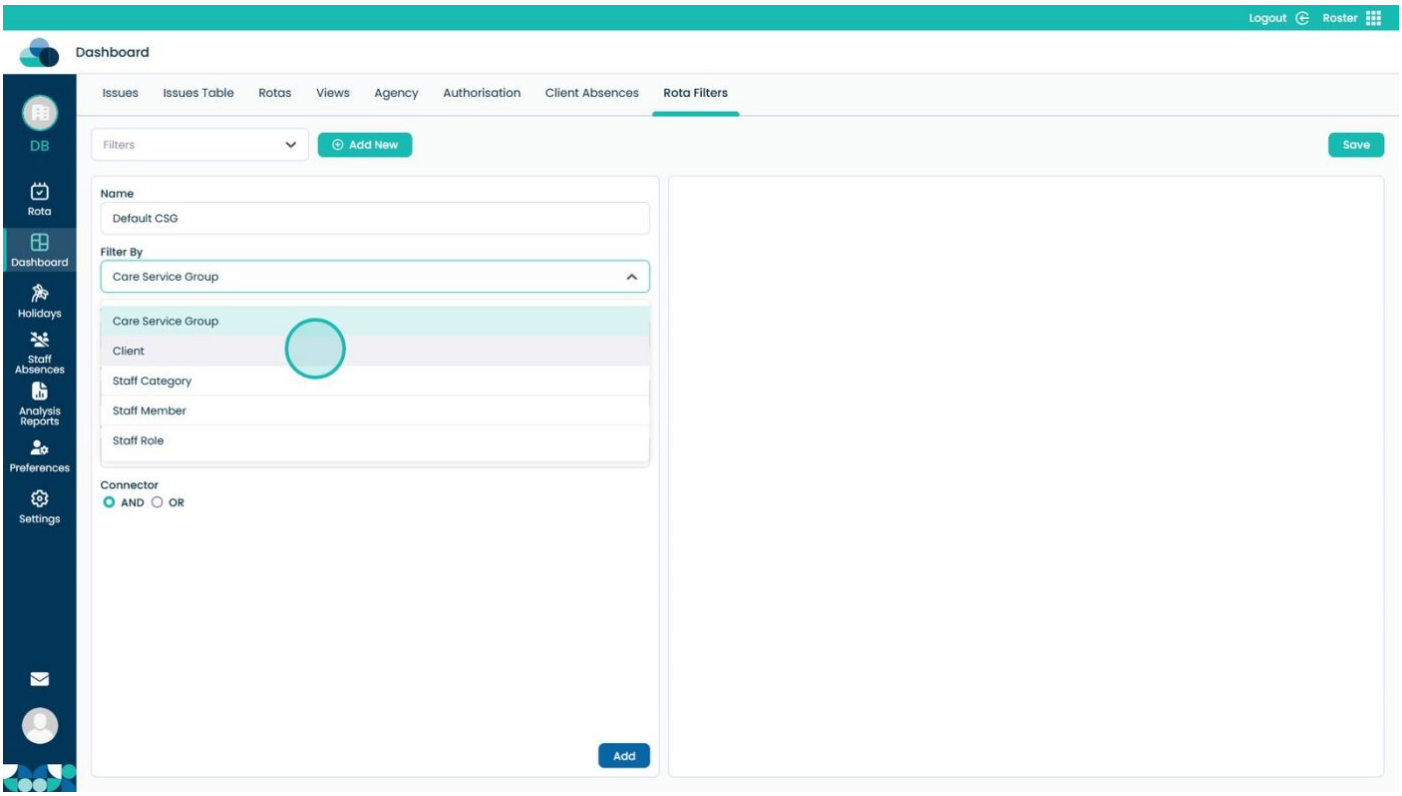
Enter a name for the filter



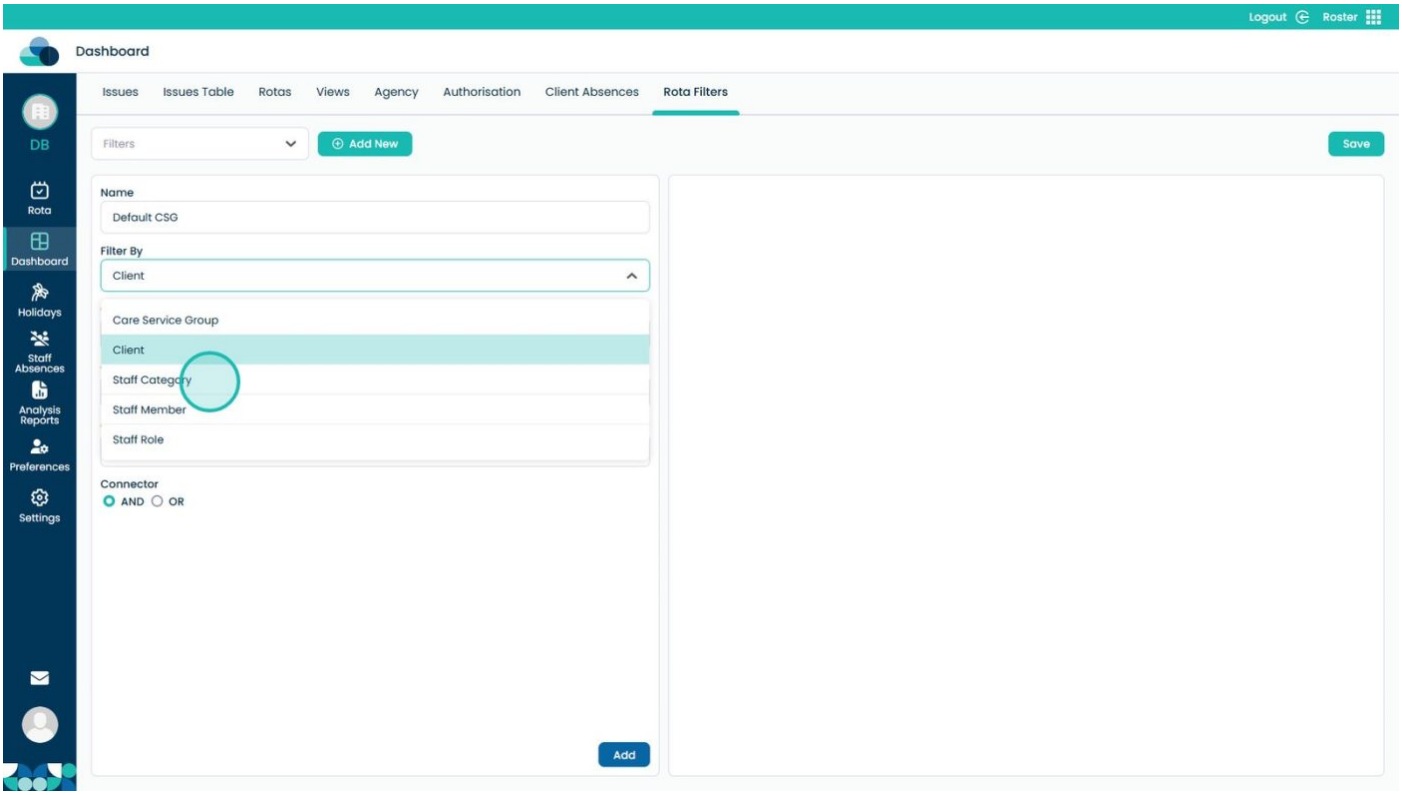
Open the Filter By options to view available filter areas



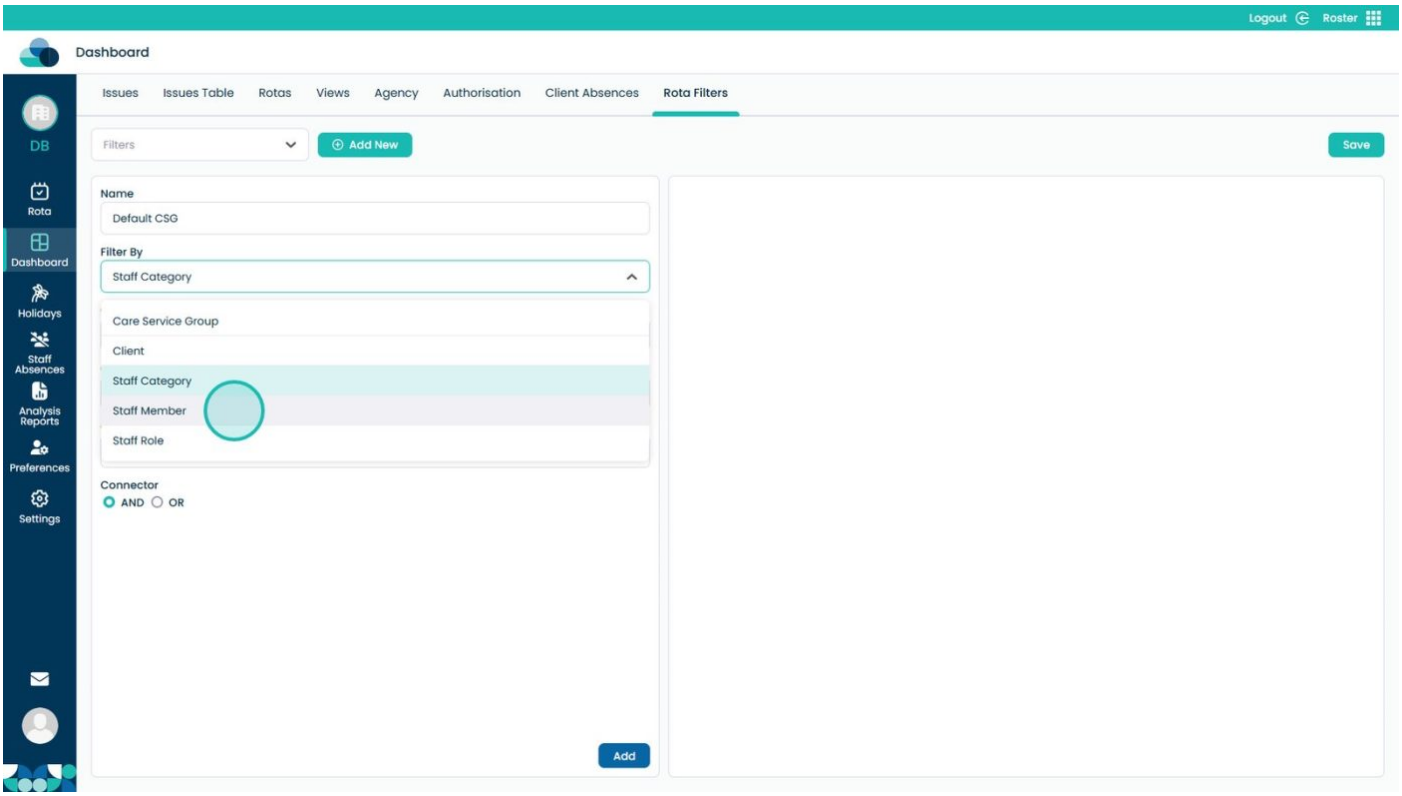
Select Client to filter by individual clients



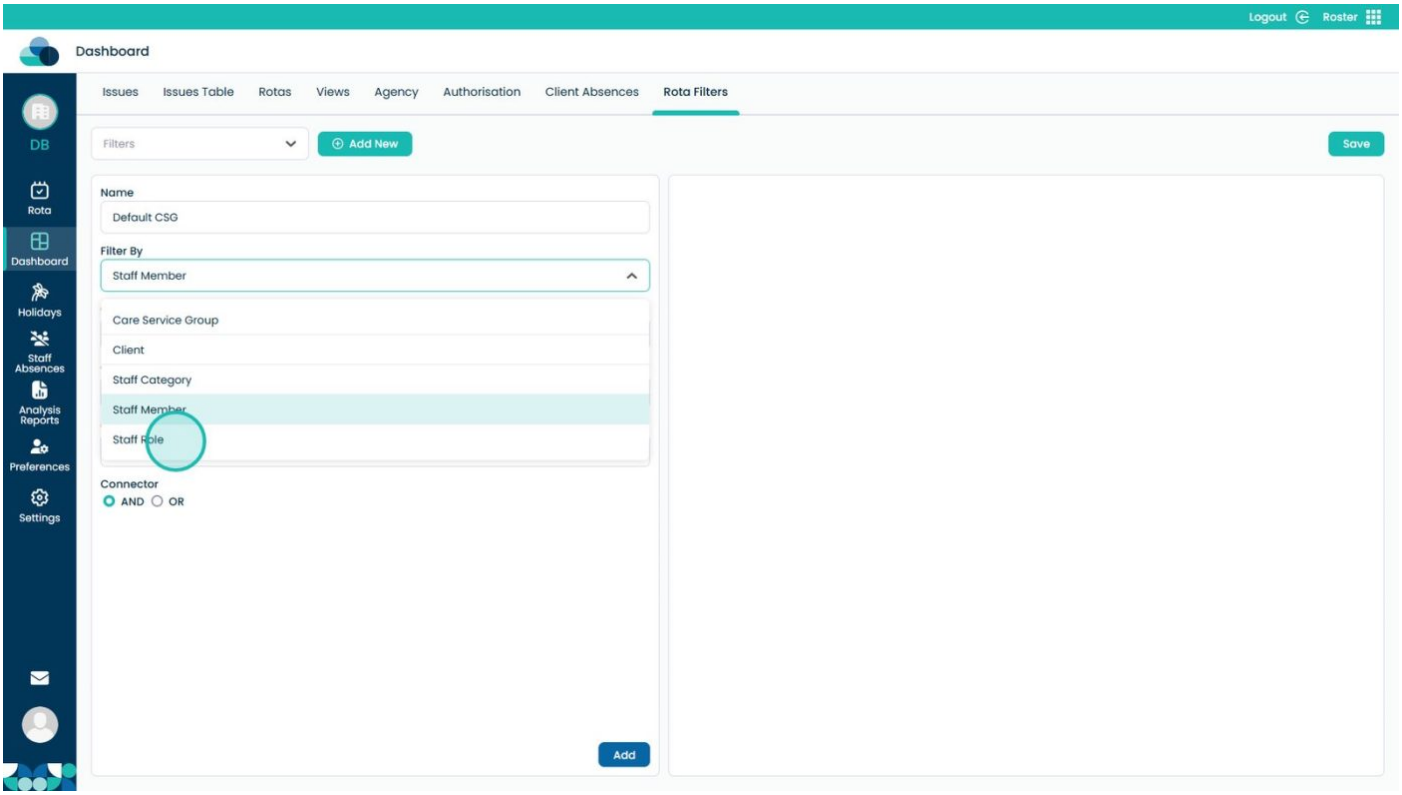
Use Staff Category to filter by a specific staff category



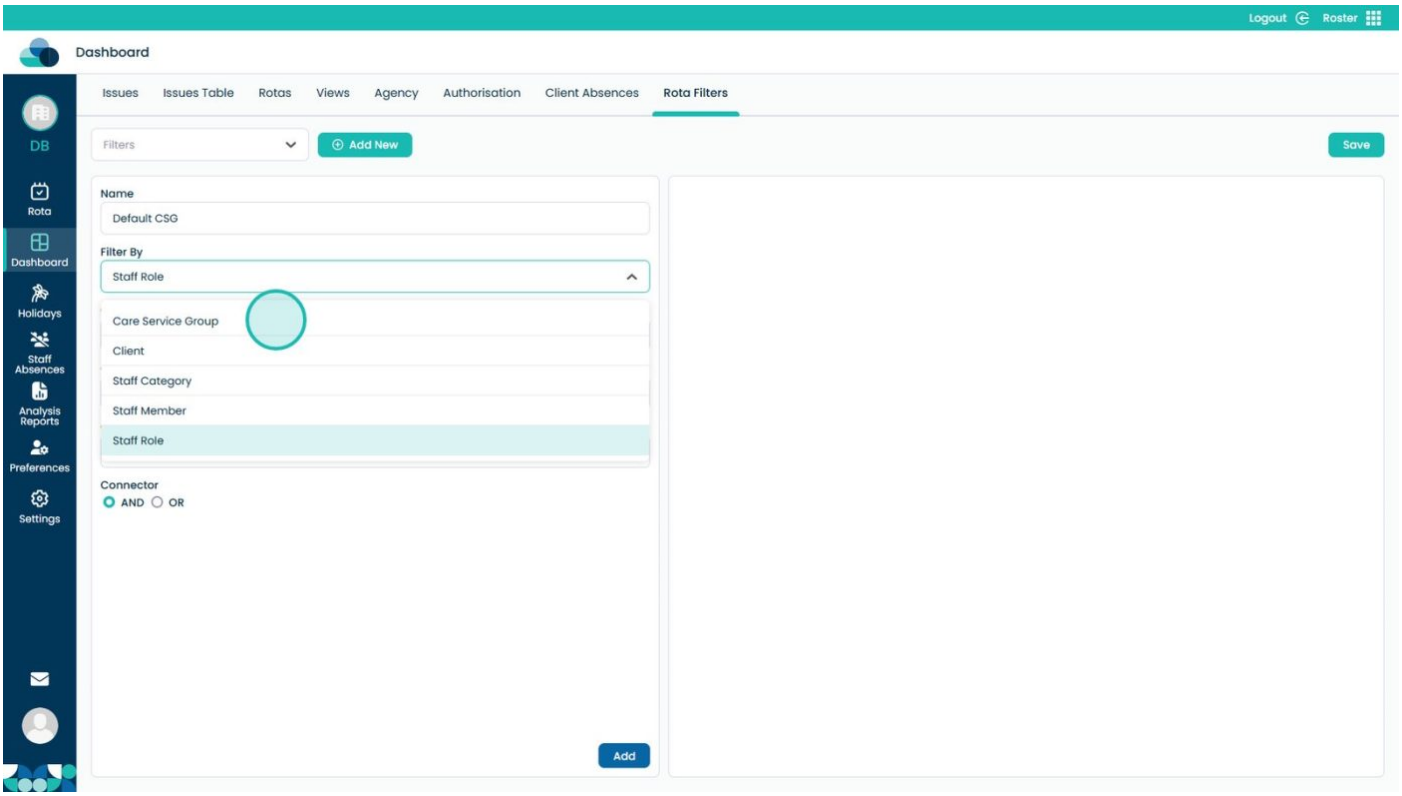
Select Staff Member to filter by individual staff



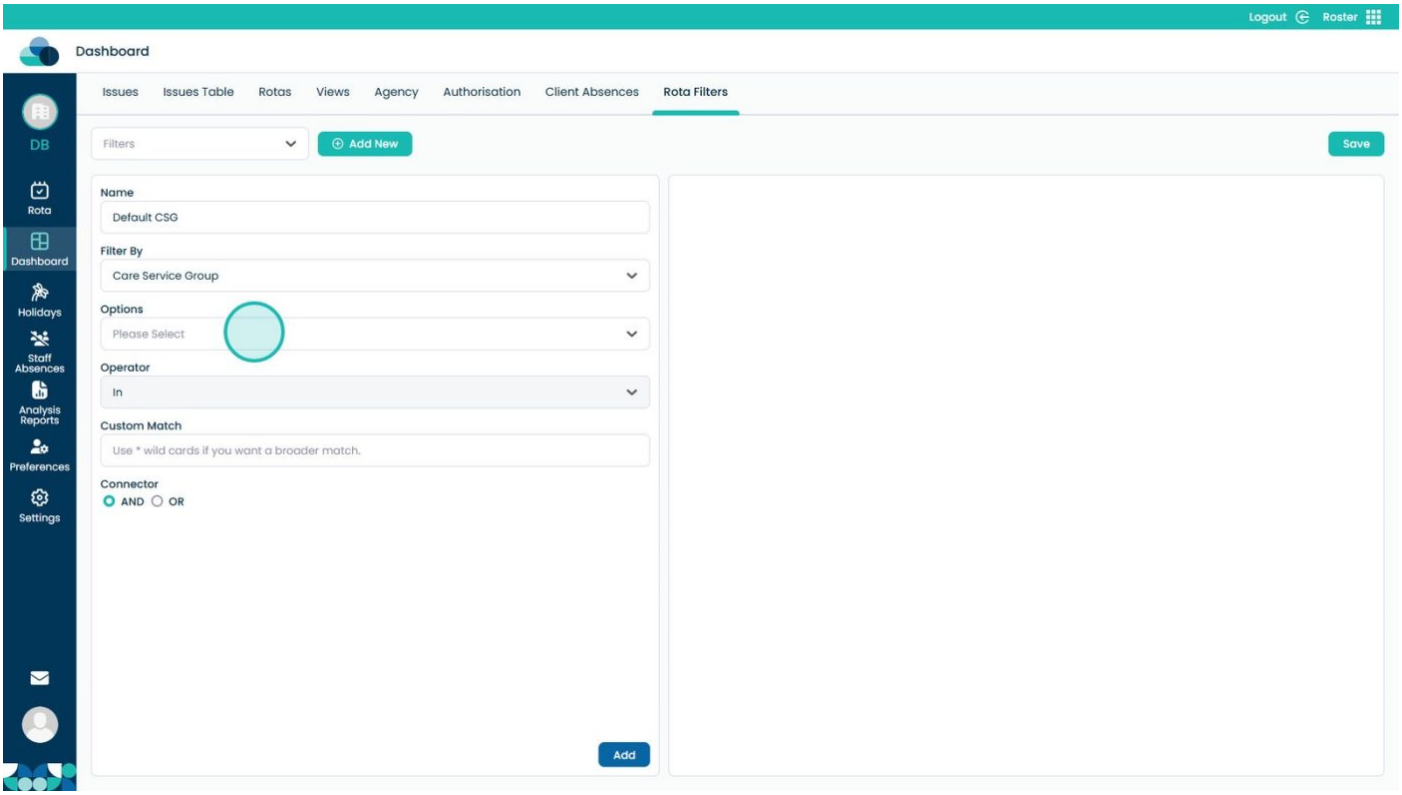
Use Staff Role to filter by a specific role



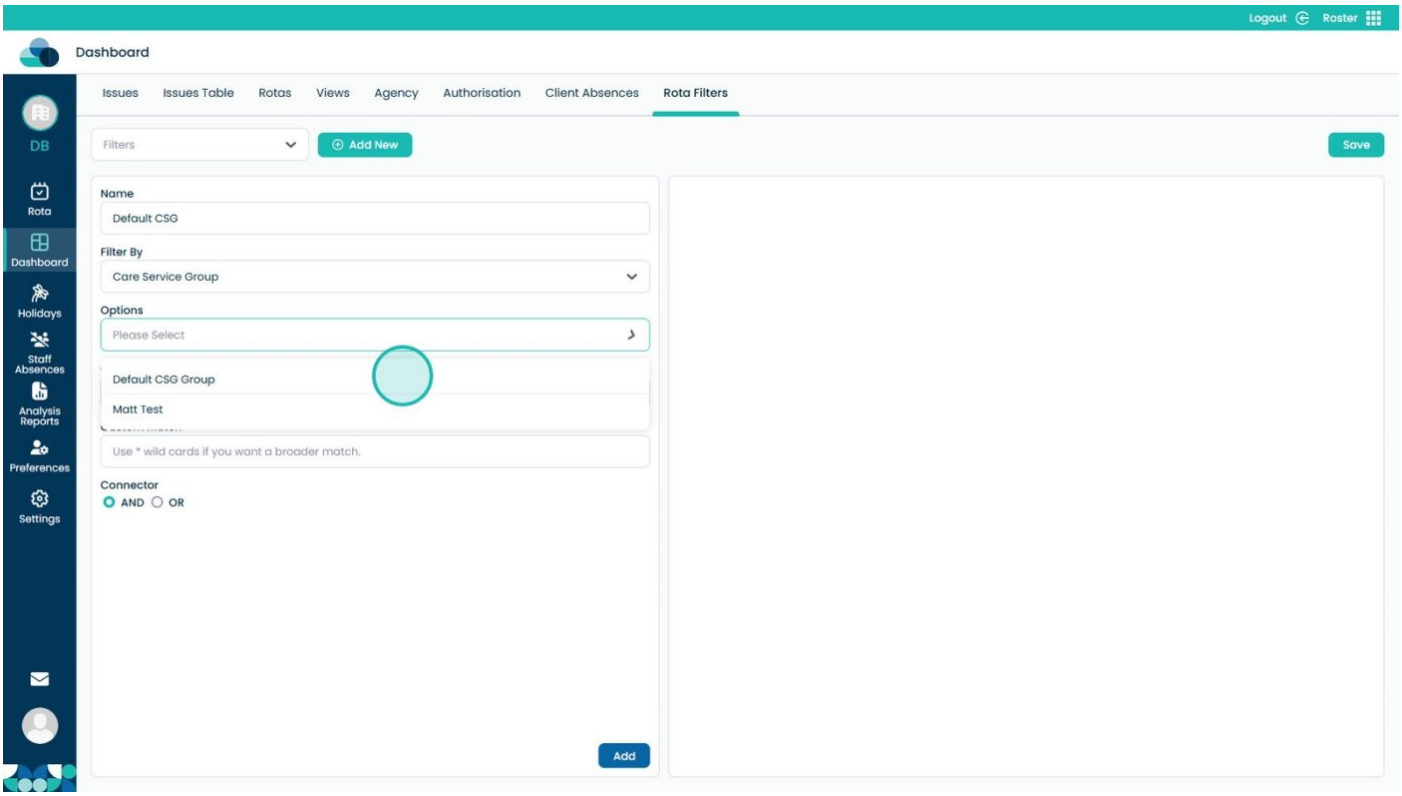
Select Care Service Group for this example



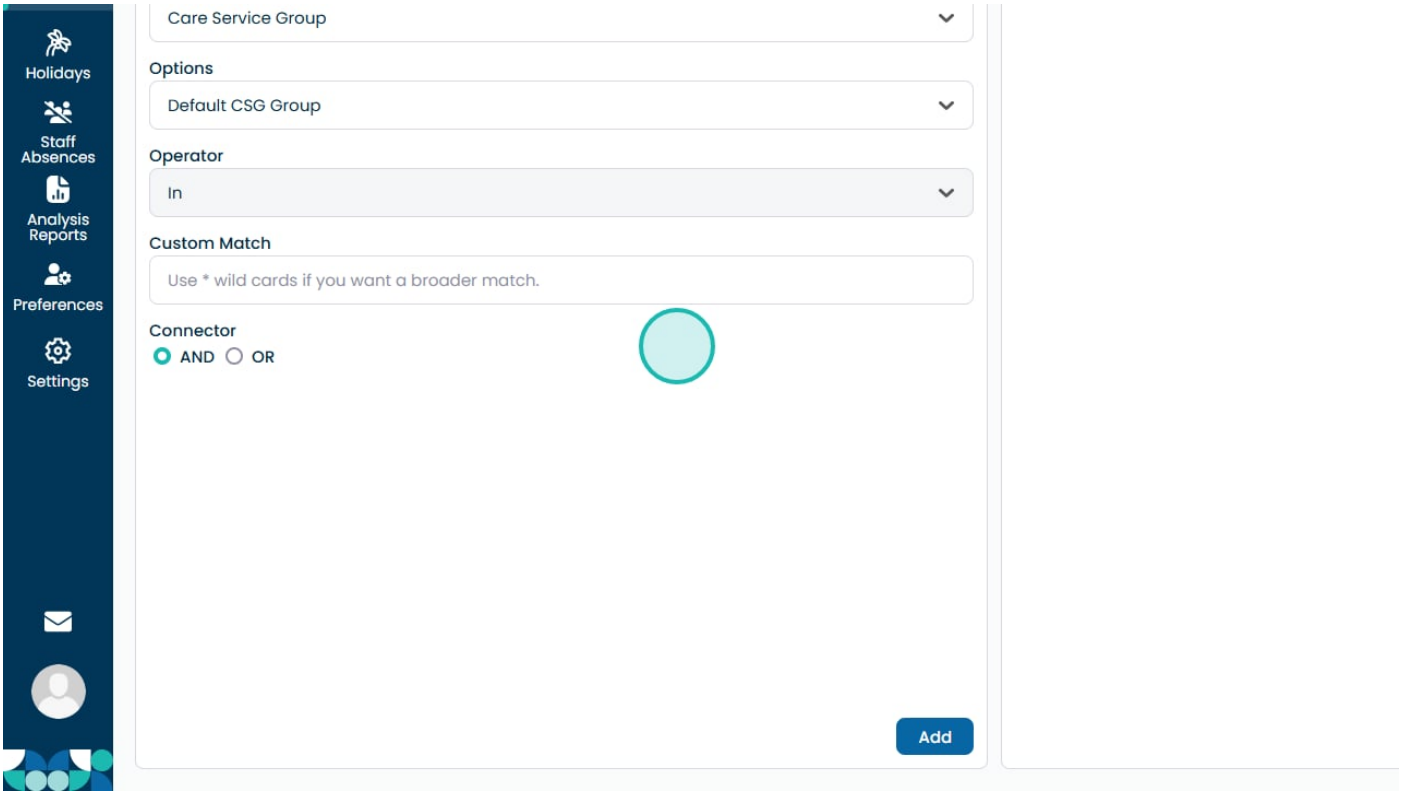
Use the Options drop-down to select values within your chosen filter category



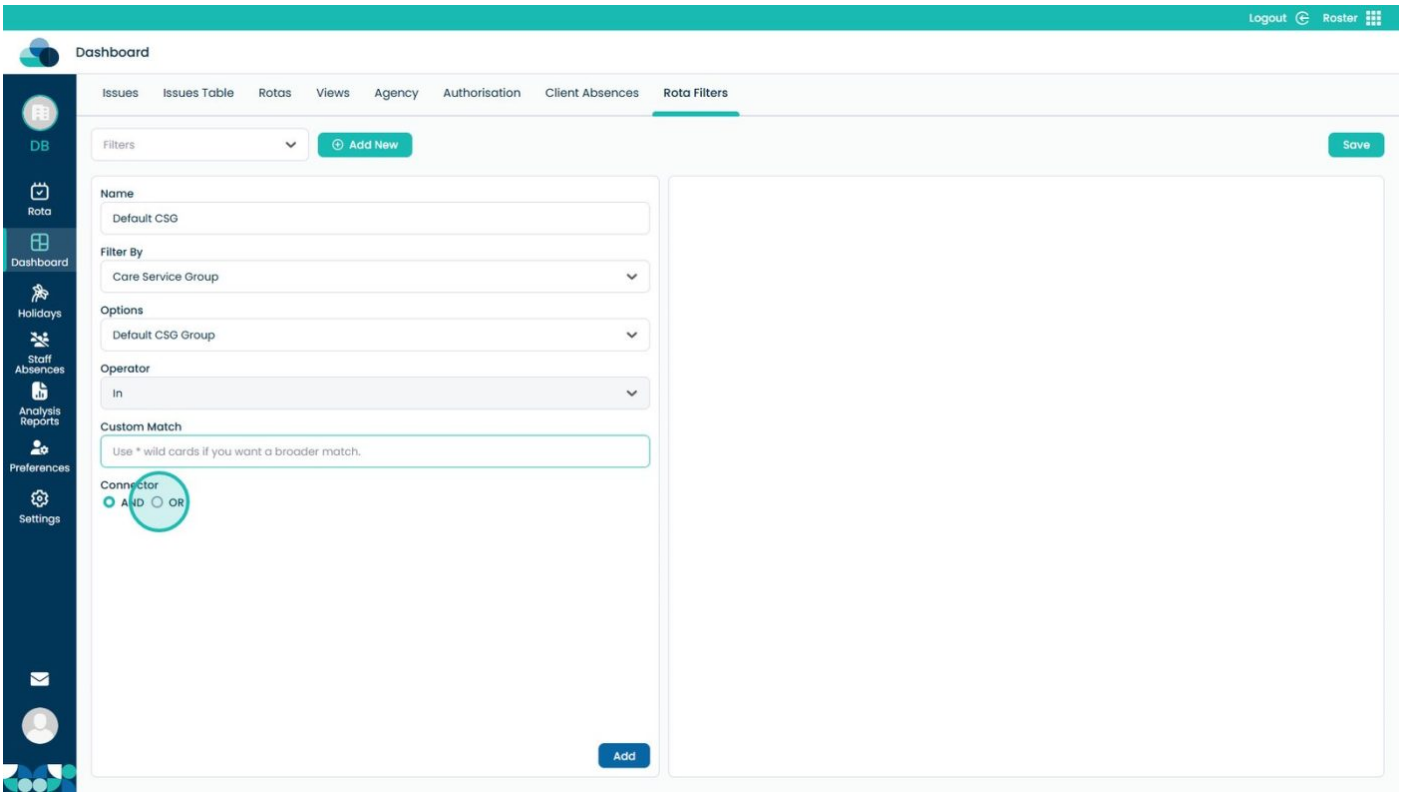
Select the option you want to filter by



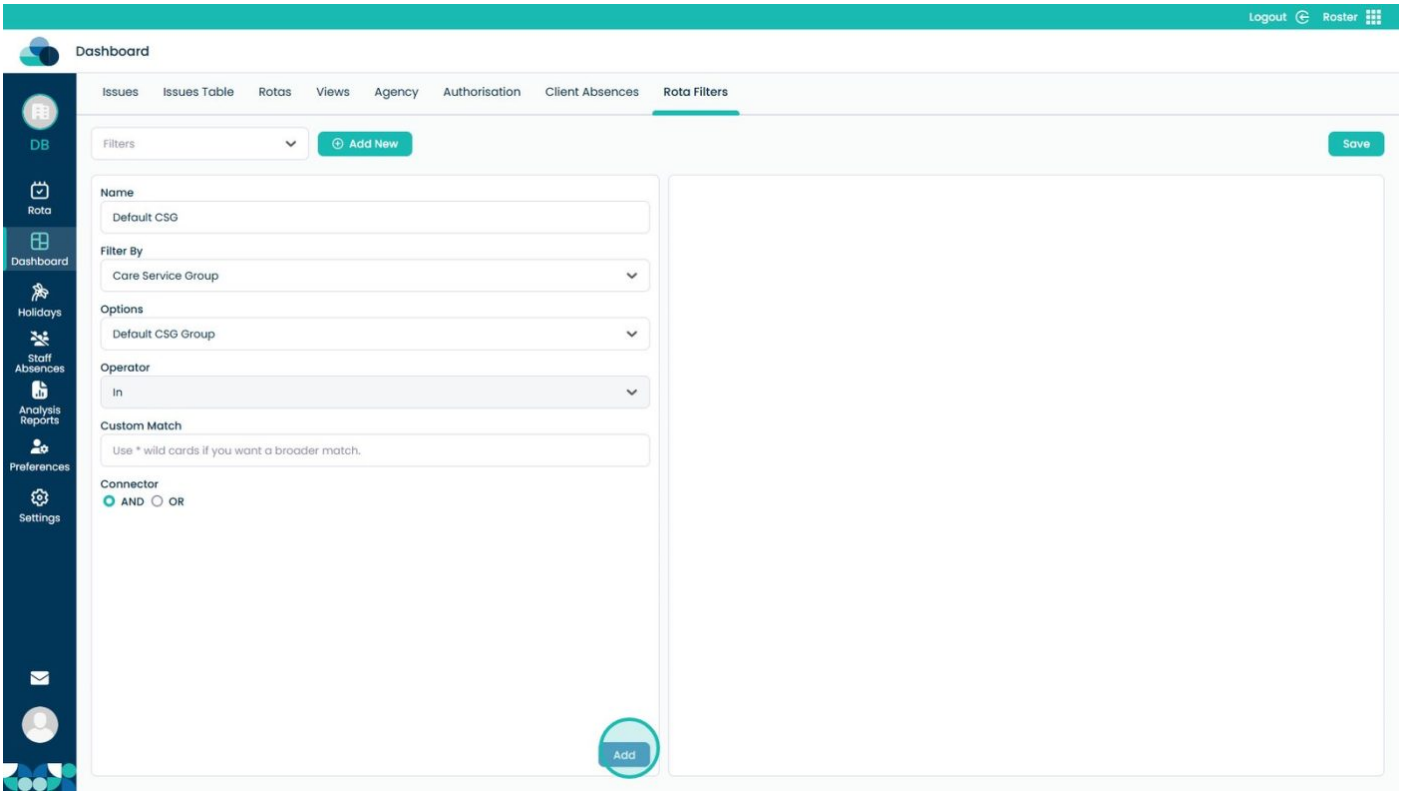
Use the Custom Match box to apply wildcards (e.g. Care*)



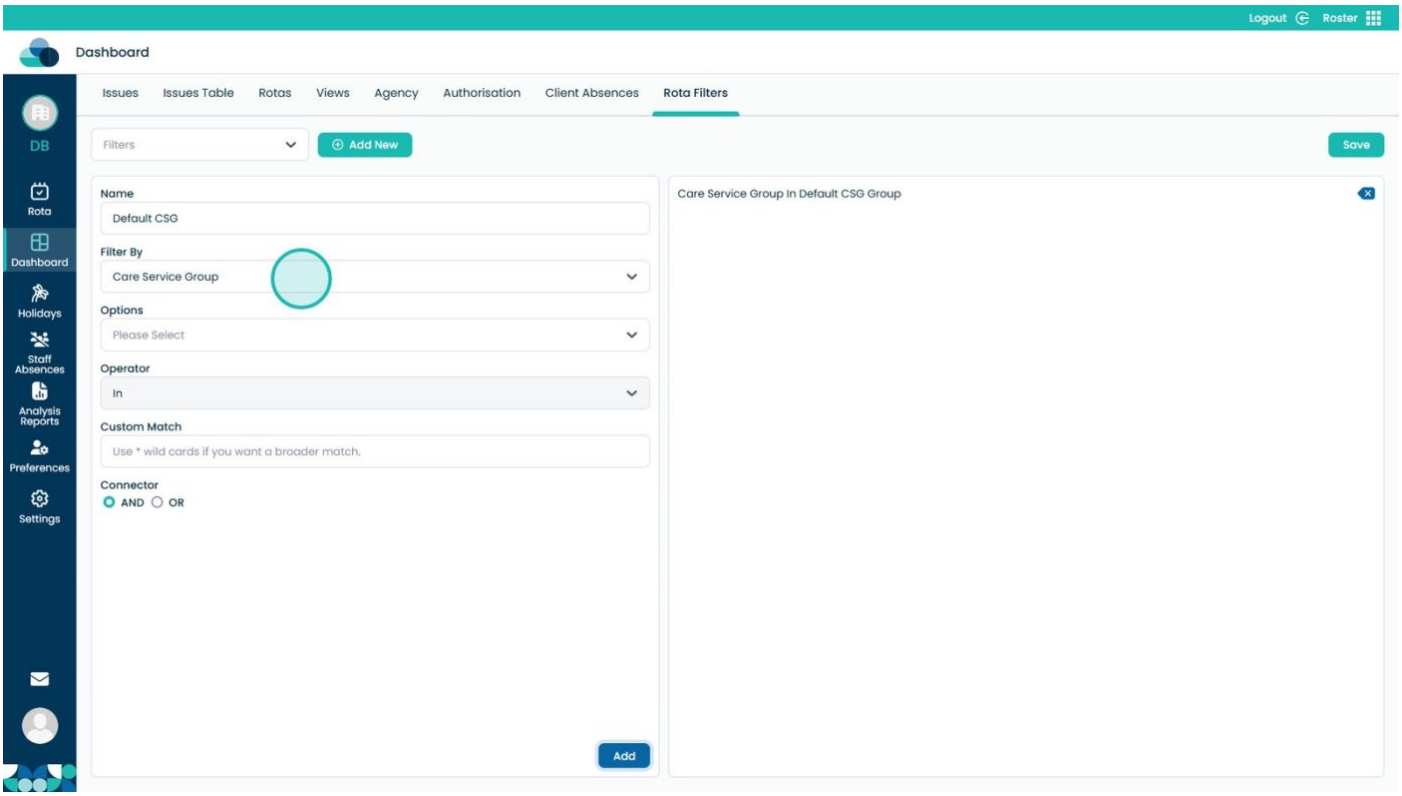
Use AND to narrow results or OR to widen results



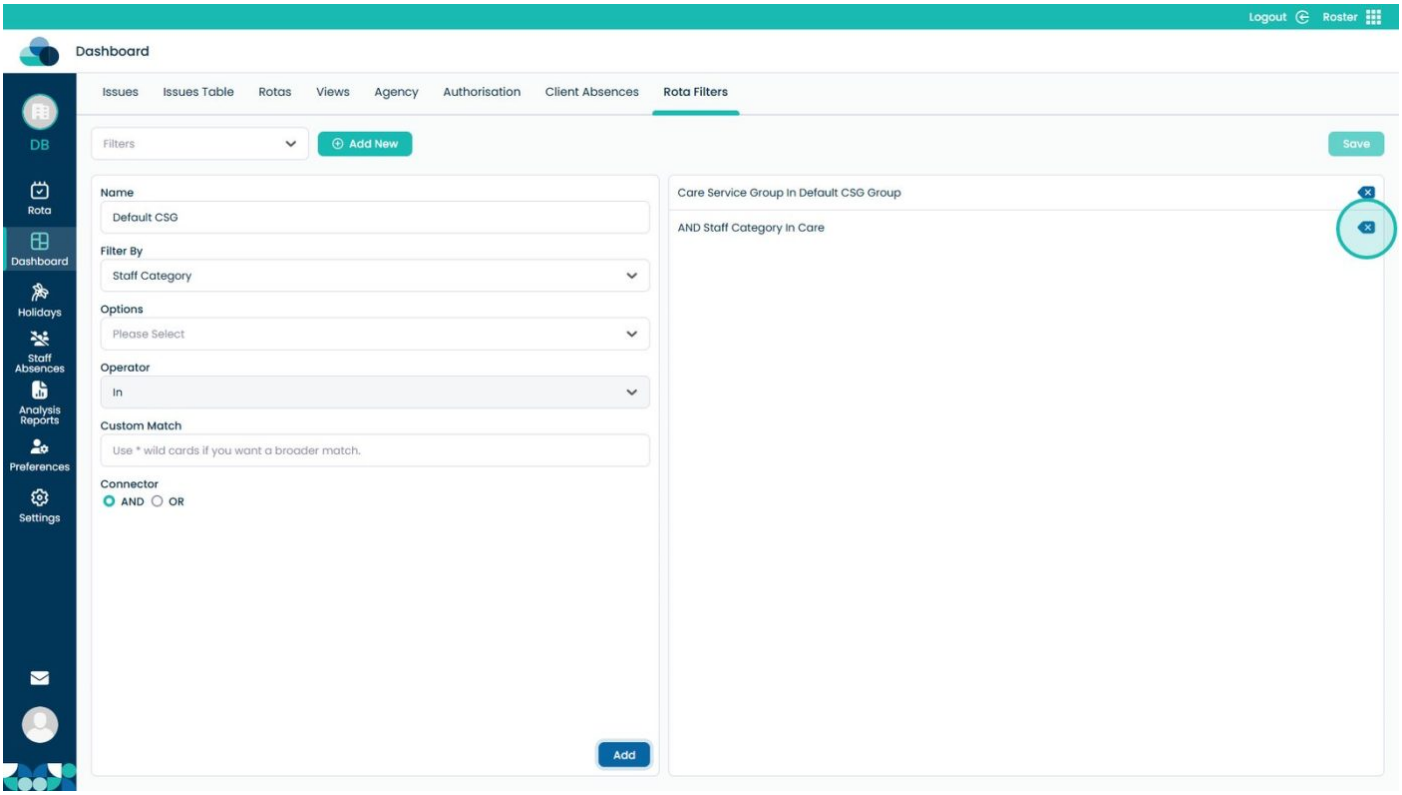
Click Add to confirm the filter



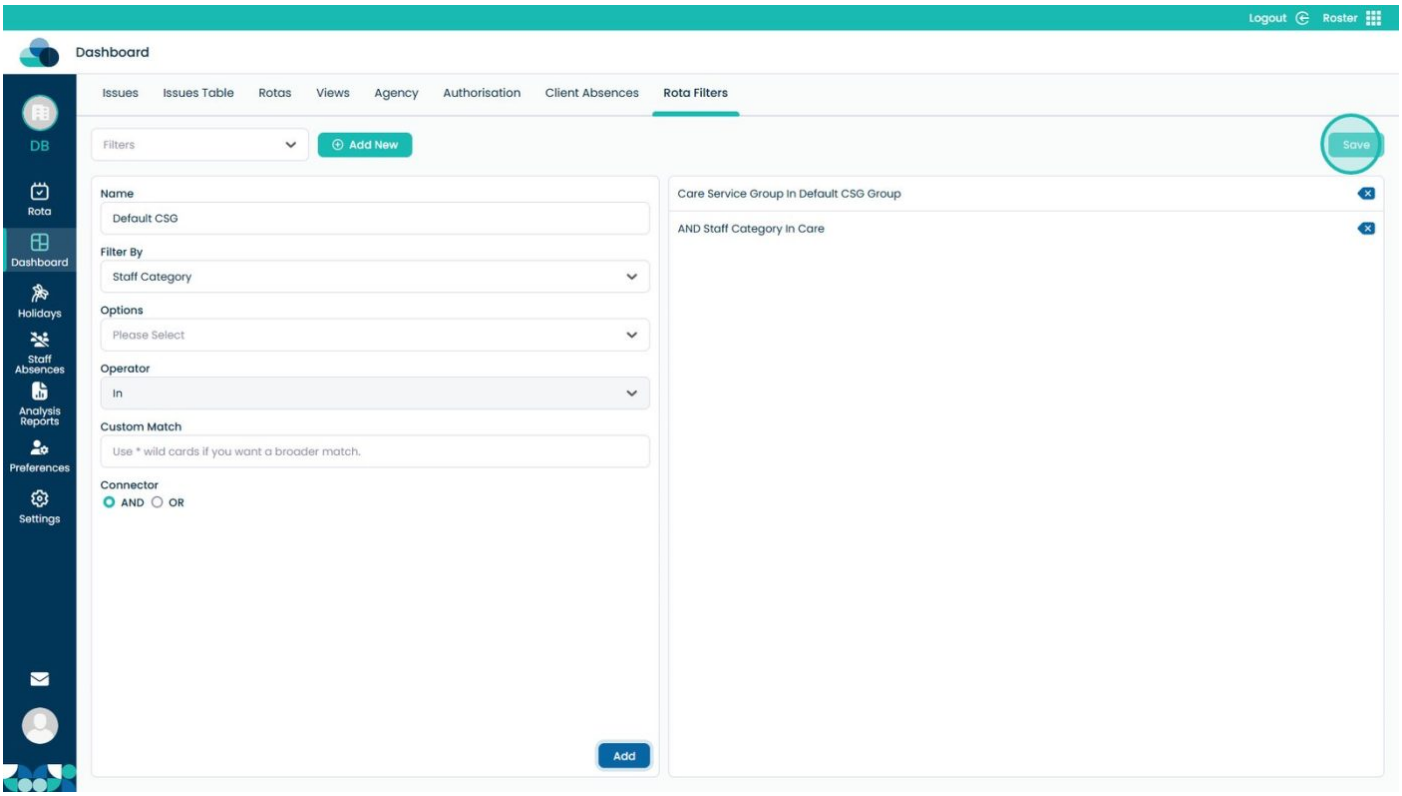
Add further filters and combine them using AND/OR



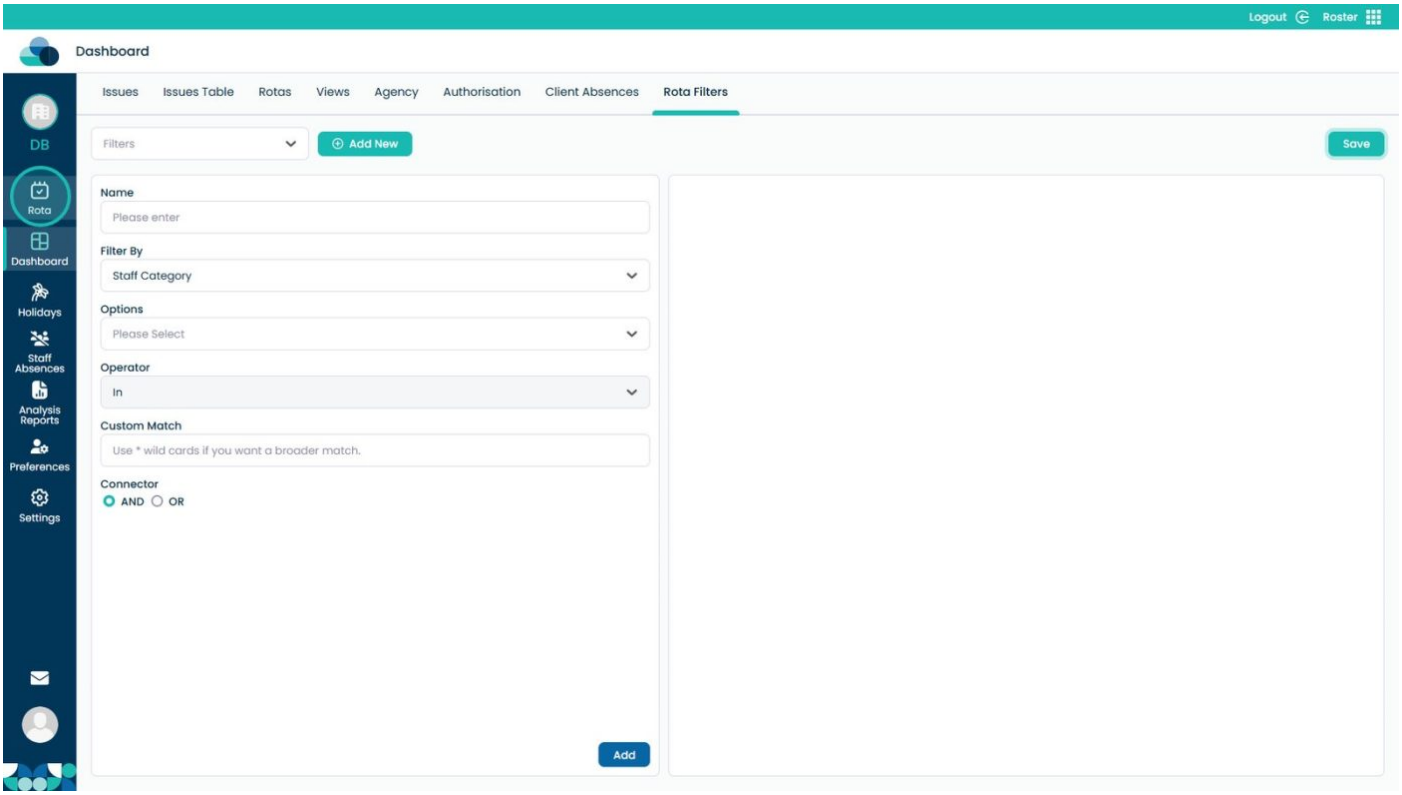
Click the X to remove filters if needed



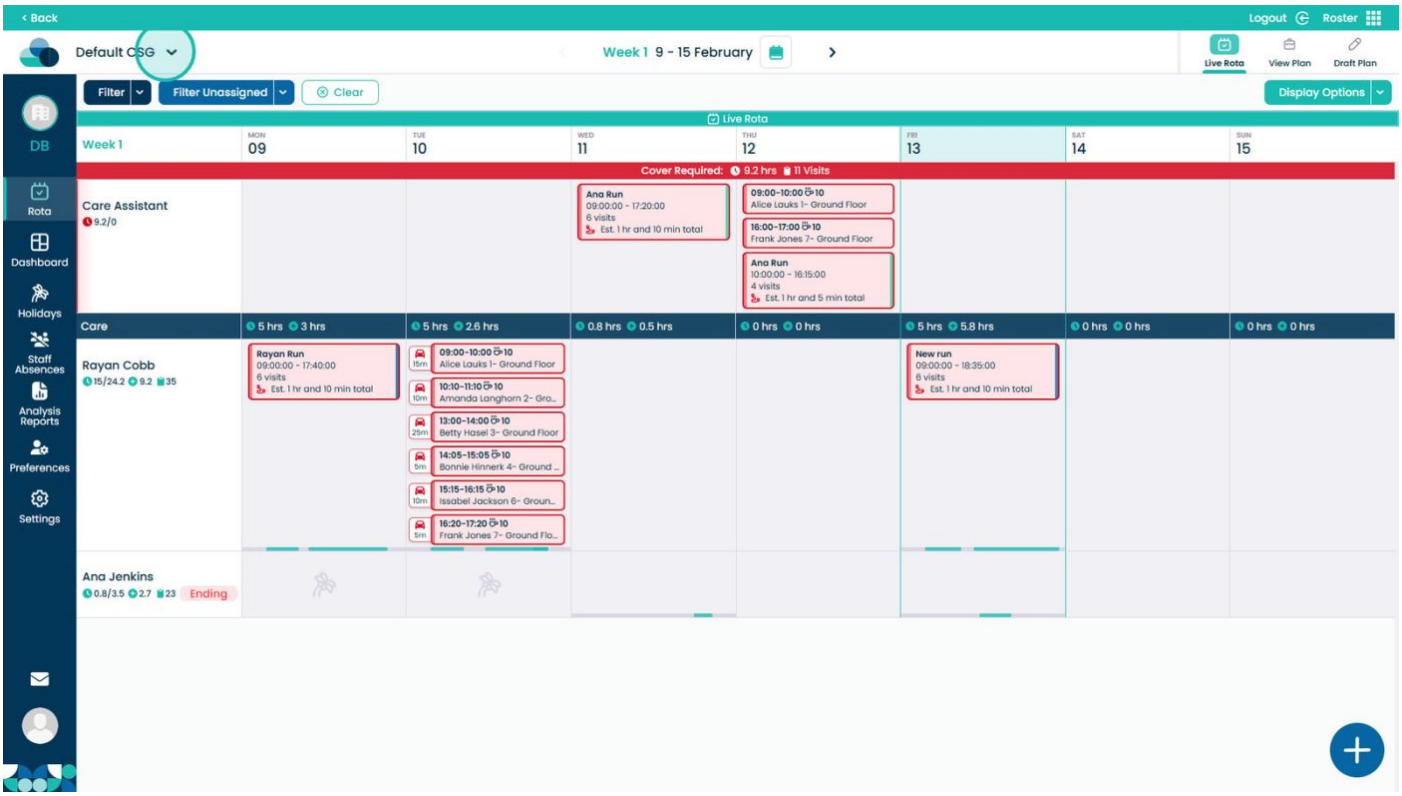
Click Save when finished



Click the Rota button on the left to return to the rota page



Open the drop-down at the top left of the screen



Select your saved rota filter to apply it

Was it helpful ?

- Happy
- Normal
- Sad

Table of Contents

↑ Top