

# Getting started with Cloud Roster

Everything you need to get started  
with Care Control Cloud Roster

## Quick start guide



# Introduction

Hello there!

Cloud Roster is the third generation of our Care Control Rostering System and the first to be fully cloud-based.

We've taken all the insights from our previous two systems to create what we believe is a revolutionary rota management system designed for today's needs.

This system offers everything you need to ensure your rotas are accurate, provide clear visibility for staff, and most importantly, safeguard your primary cost base.

With built-in notification support connecting seamlessly to both Pocket and Mobile apps, it enables effortless communication. It also features working hour controls, detailed analysis, support for multiple rotas, and so much more!

If you still haven't switched over to Cloud Roster yet, please follow this information guide on how to switch over:

<https://cclearninghub.co.uk/migrating-to-cloud-roster/>

This short guide will give you the basics you need to get started with Cloud Roster, by following this guide you will have a basic rota set up and ready to use.

For further guides please see the dedicated Learning Hub page here:

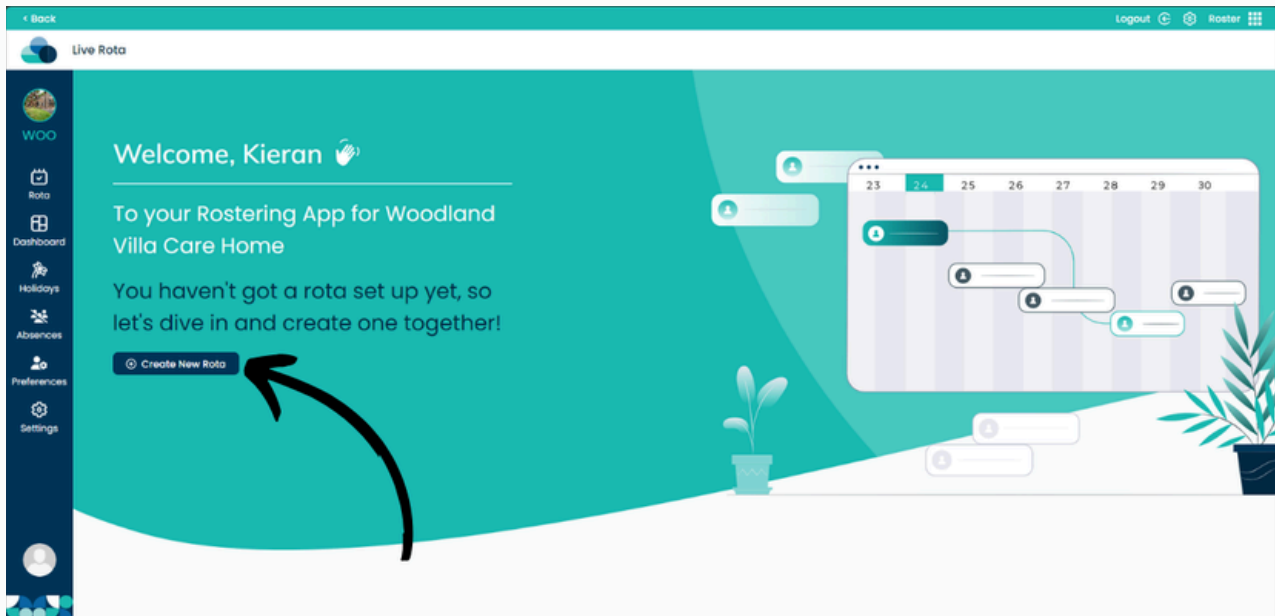
<https://cclearninghub.co.uk/roster-cloud/>

We hope this guide helps you get to grips with Care Control Cloud Roster.

# Creating a new rota

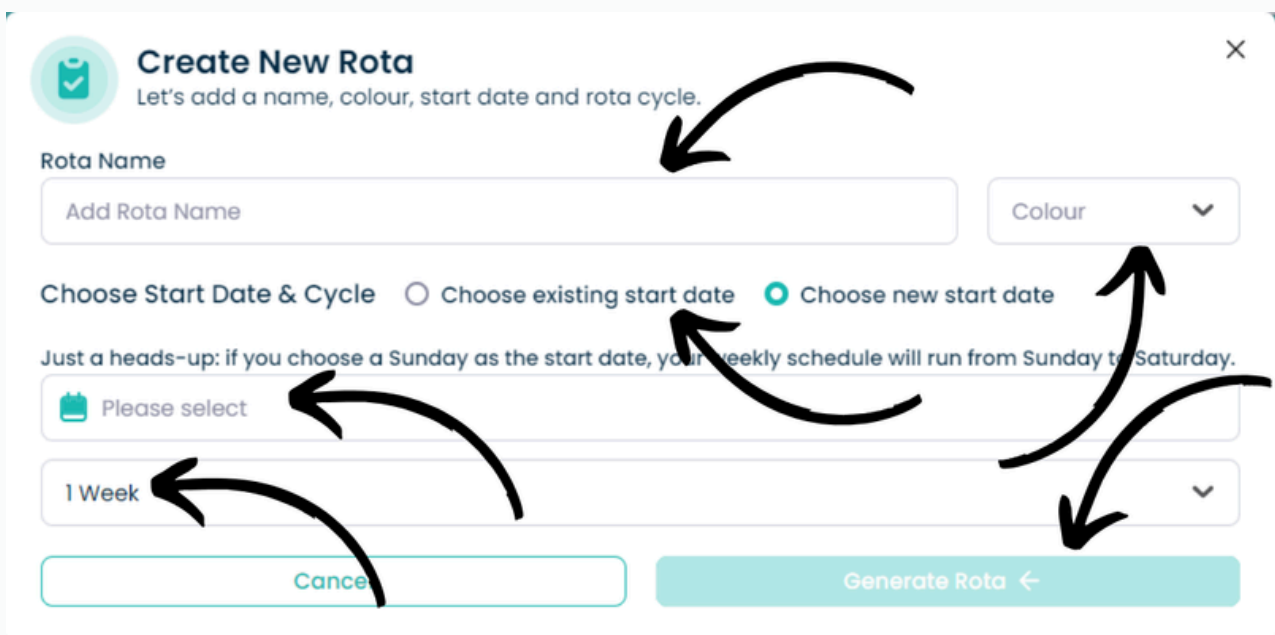


From the Roster page on Cloud, select **Create New Rota**.



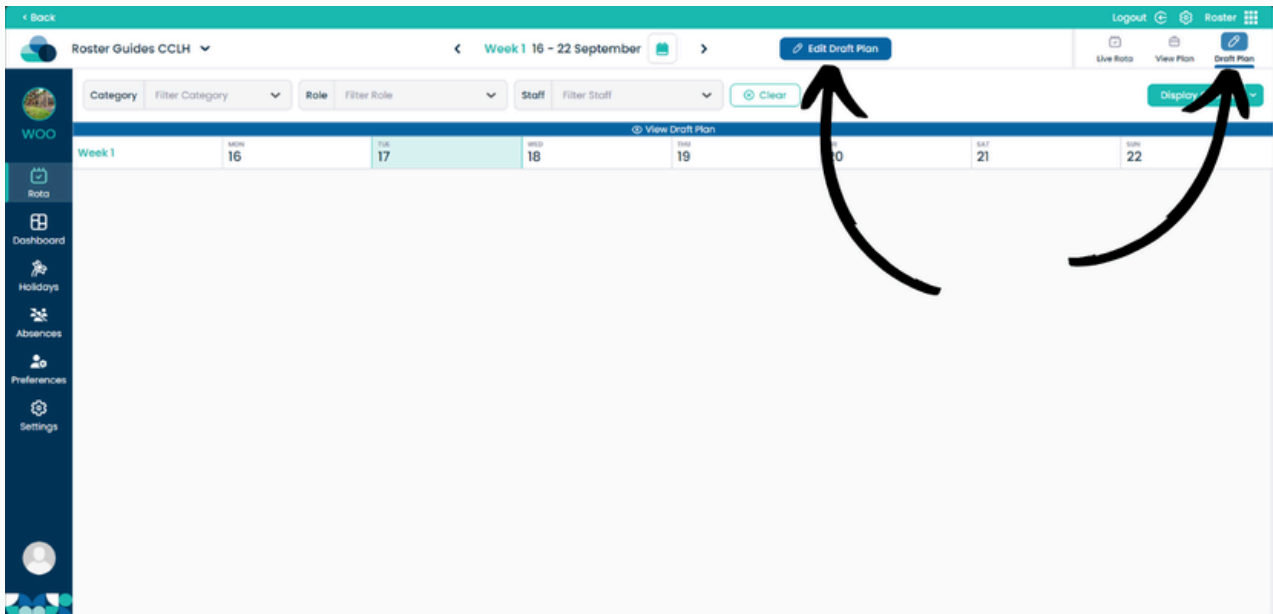
The rota creation pop-up will appear. Start by **entering a name** for your Rota, an example would be "Care Manager Rota". Select a **Colour** for the rota, this will help you distinguish between rotas. Make sure **Choose new start date** is selected as this is your first rota. Select which **date** you want the rota to start from. Finally pick your **weekly cycle**.

When you are happy with your selections, click **Generate Rota**.

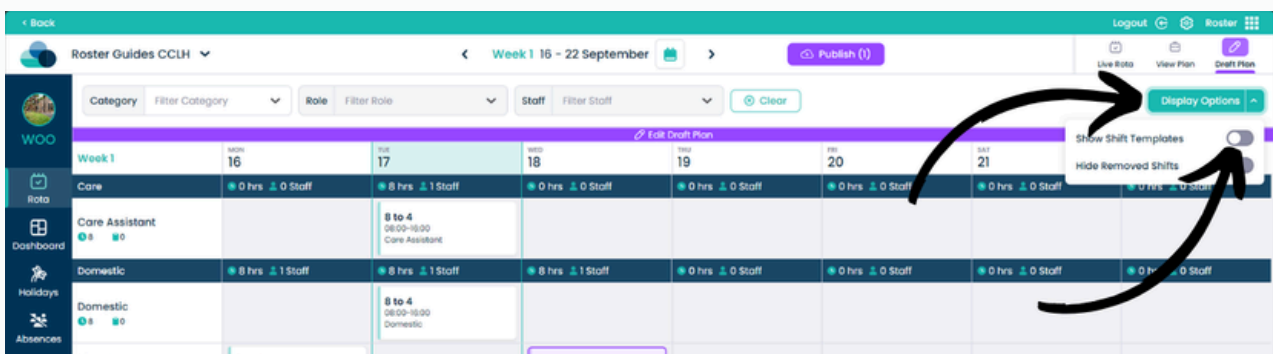


# Manage shift templates Cloud

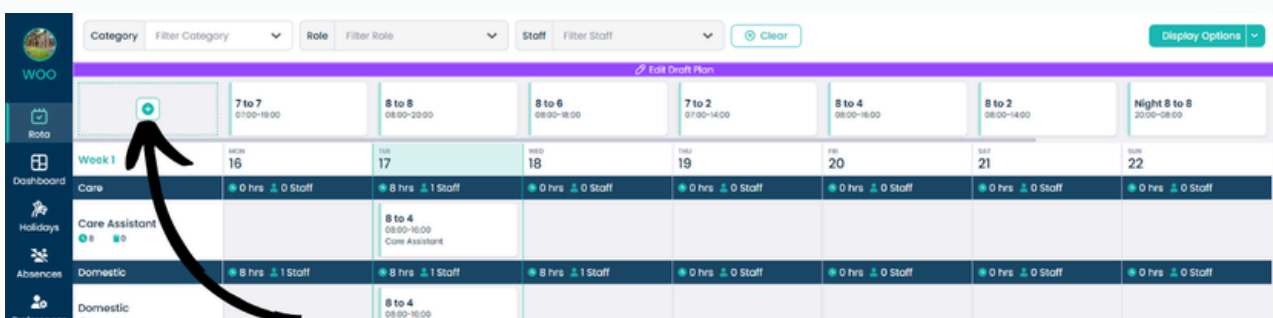
The first thing you should do is manage your shift templates. This will allow you to manage your rota more efficiently later on. Select **Draft Plan** and then **Edit Draft Plan**.



Then you need to click the drop down menu **Display Options**. Then toggle **Show Shift Templates**.



This **Show Shift Templates** menu will now show. Click the **Plus Button** to start manage your **Shift Templates**.



# Manage shift templates Cloud

On this window you can create new **Shift Templates** and modify others. If you would like to delete any of the sample templates, click the **Blue Cross** button to the right of the template. To modify existing templates, click the **Pencil Icon**.

To create a new shift, enter a name for the shift in the **Please enter** box. If necessary, you can apply a **role** to the template, this will allow only that specific role to use that shift.

Enter a **Start** and **End** time in the box using the 24 hour clock. You can add **Indicators** to the shift which can allow you to quickly identify the shifts, but these aren't necessary.

Once all of the details are correct, click the **Tick Button** to the right of the shift to add it to your list.

The screenshot displays the 'Manage Shift Templates' modal window. The table lists the following templates:

Name	Role	Shift	Indicator(s)
7 to 7		07:00 - 19:00	
8 to 8		08:00 - 20:00	
8 to 6		08:00 - 18:00	
7 to 2		07:00 - 14:00	
8 to 4		08:00 - 16:00	
8 to 2		08:00 - 14:00	
Night 8 to 8		20:00 - 08:00	
Night 7 to 7		19:00 - 07:00	

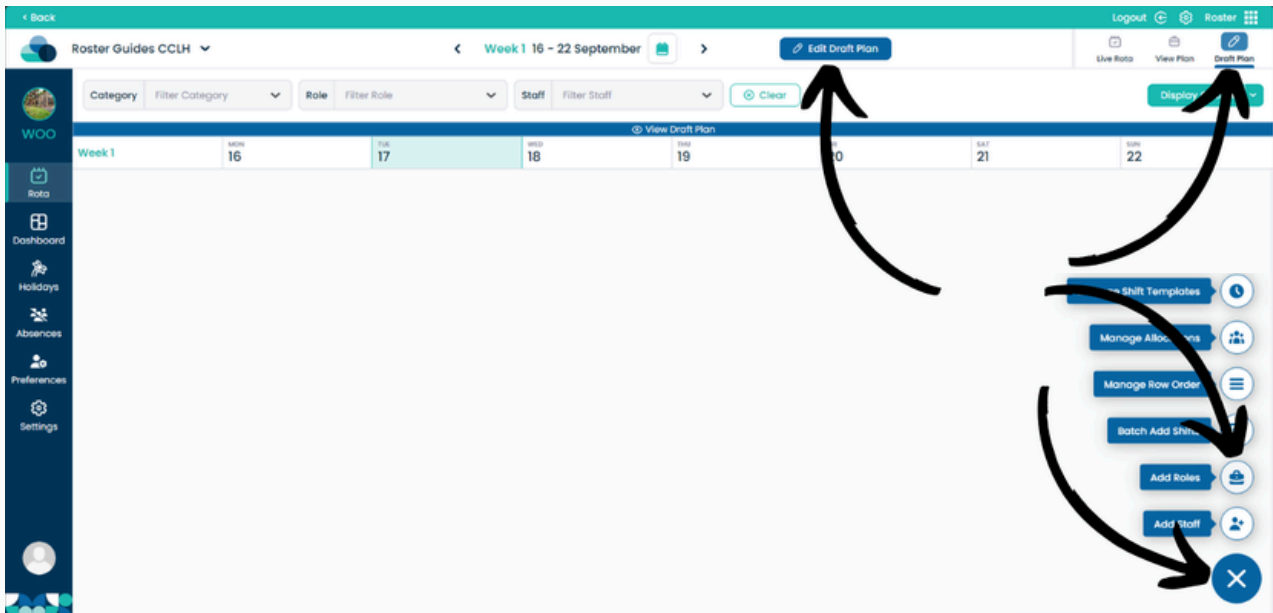
The form at the bottom includes a 'Please enter' text box, a 'Role' dropdown, and 'Start' and 'End' time pickers. A green checkmark icon (the 'Tick Button') is located to the right of the form fields.

Once you are happy with all of your shifts, you can close the box and return back to your rota view.

# Adding Roles

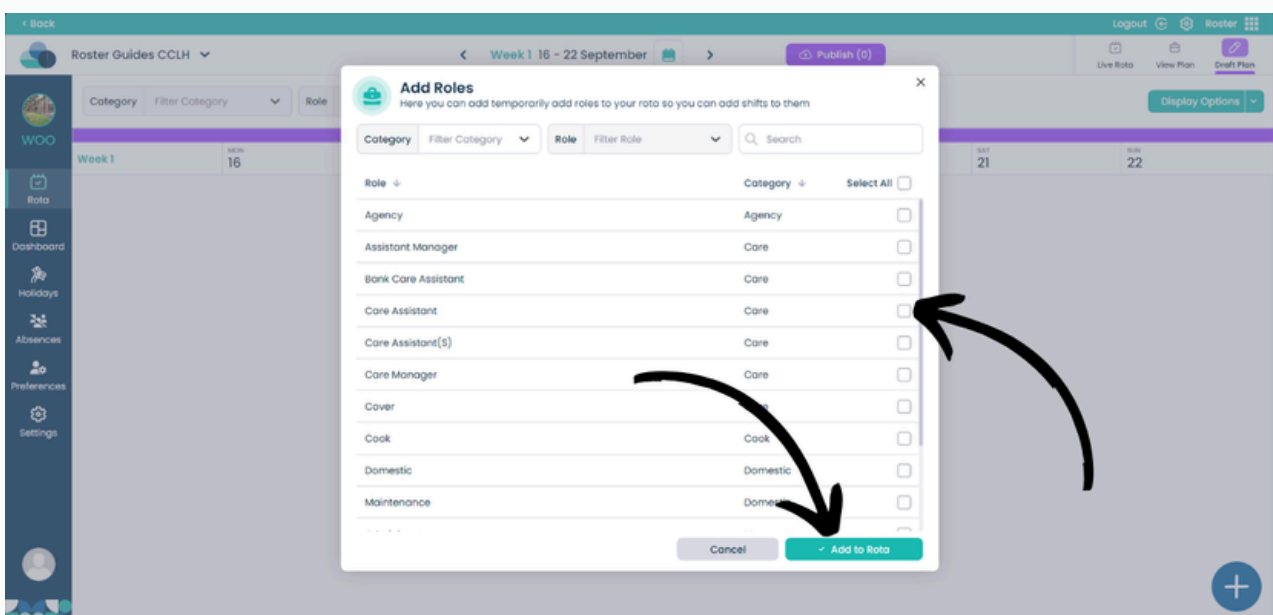


Now you are on your fresh rota, you want to navigate to **Draft Plan** in the top right of the screen. Then select **Edit Draft Plan**. Then click the **Plus button** in the bottom right of the screen. After that select **Add Roles**.



Select which roles you want to add to the rota. You can filter the role category and by exact role with the drop down menus at the top of the box. You can also search for specific roles.

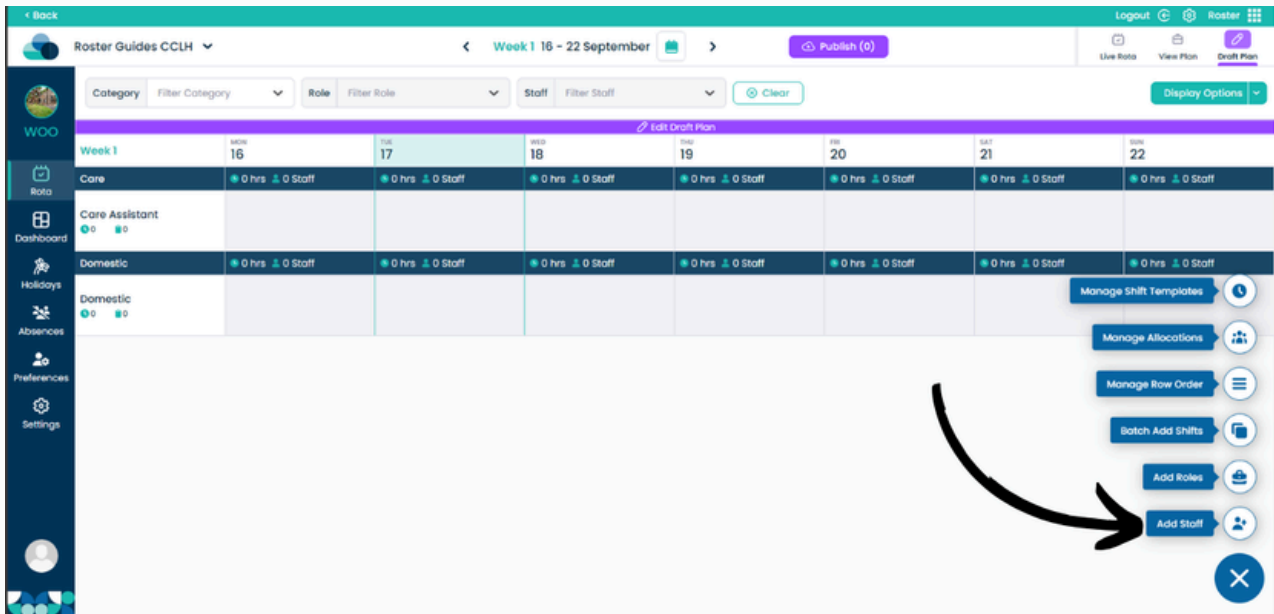
Once happy with your selection, click **Add to Rota**.



We recommend only selecting one or two roles per rota, this will make organising your rotas easier in the future.

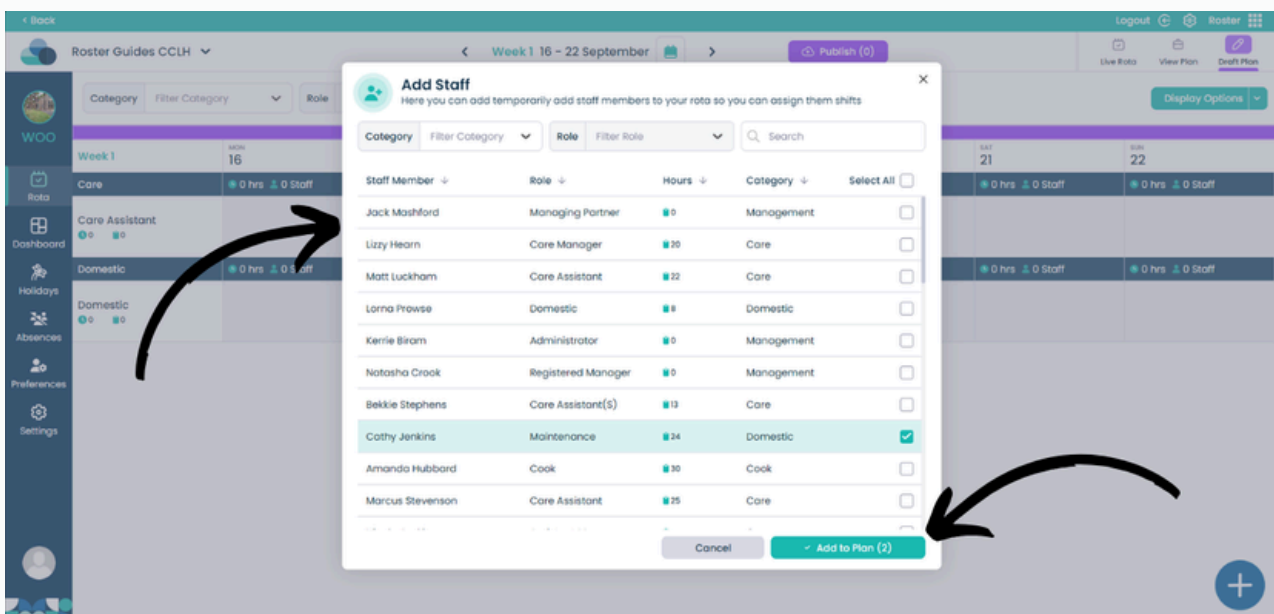
# Adding Staff

Your roles are now added to the rota, you just need staff to fill the roles. Similar to the last step you want to make sure you are in **Edit Draft Plan**. From there, select the plus button and click **Add Staff**.



Pick which staff you would like to add to the rota from this screen. We recommend selecting staff with the same role(s) that are already on the rota. You can filter through the category and role as before.

Once happy with your selection, click **Add to Plan**.





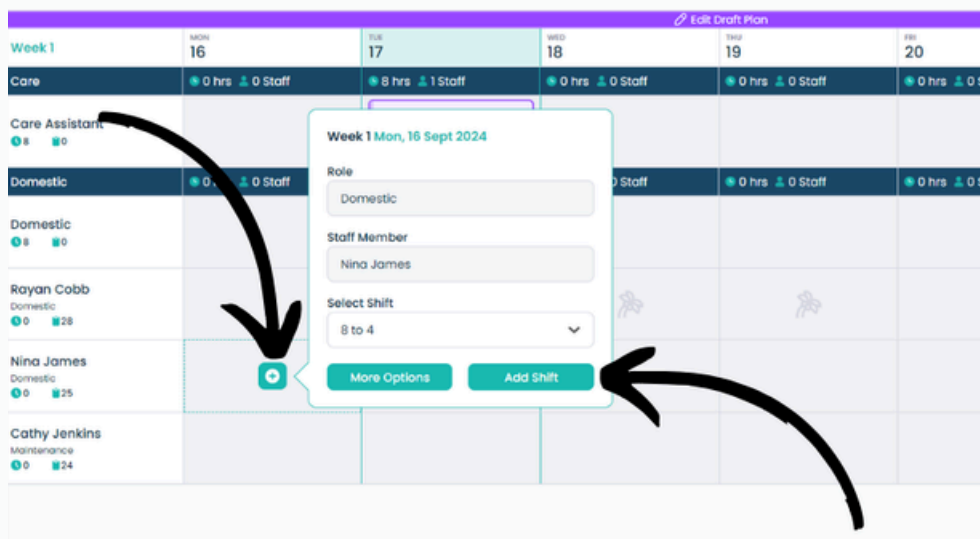
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# Quick add shift

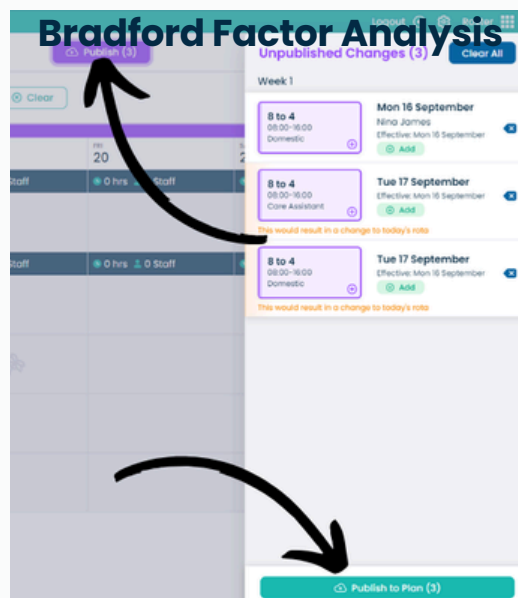
You now have your roles and your staff added to the rota, but they need shifts! To quickly add a shift ensure you are in the **Edit Draft Plan** mode. You can also quickly add shifts from the **Live Rota**.

When your mouse is hovering over a staff member, click the **plus button** over their cell. Pick which shift you would like from the **Select Shift** drop-down menu. Finally, click **Add shift**.

The staff member should now have a shift assigned to them for that day and for the hours you selected.



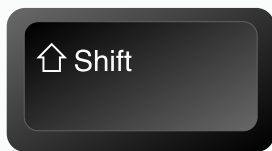
If you are in the **Edit Draft Plan** menu, you need to publish your shift. Click the **Publish** button at the top of the screen, then select **Publish to plan**.



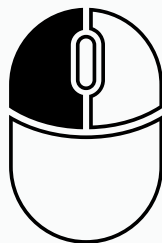
# Useful shortcuts

Cloud Roster not only has a rich set of features, but also includes quick and easy way to do things without having to click through menus. With simple taps of the keyboard and mouse, you can modify your rota with ease.

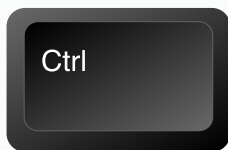
This page includes all of the helpful keys that will save you time!



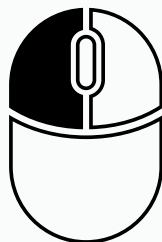
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Duplicates, when dragging a shift it creates a copy of it instead of moving it.



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Ignores Swaps which allows you to drag shifts over other shifts with the action becoming "move this here"

For further guides and more information please visit the Care Control Learning Hub by following this link: <https://cclearninghub.co.uk/cloud-roster/>



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