# Chapter 6: Rosters

One job of music ministry leaders is to roster your music team so that everyone can know ahead of time when it's their turn for song leading or piano playing. CMO endeavours to make this job as easy as possible, by providing a simple way of creating the roster, as well as integrating the roster with meeting preparation.
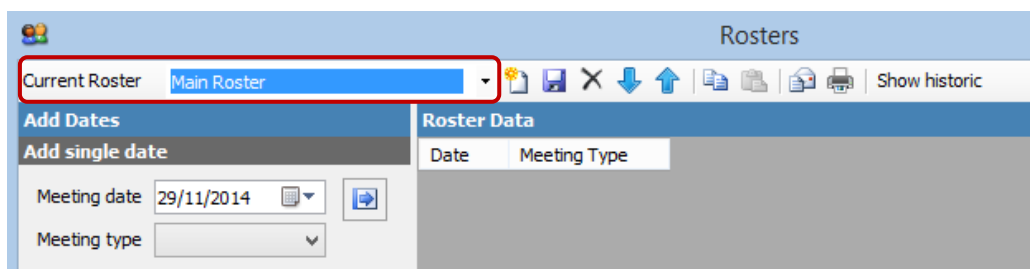
Creating a roster

The first step in using rosters is to create one. Go to the "View → Rosters → Roster maintenance..." menu.
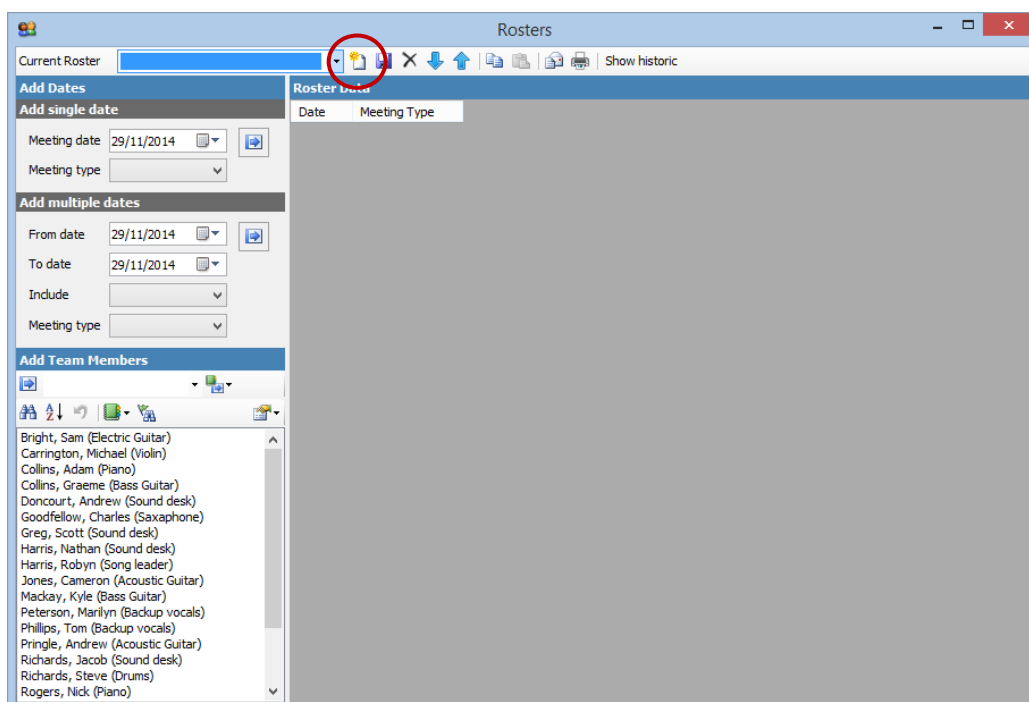
On the roster maintenance window, click on the button in the toolbar to create a new roster.
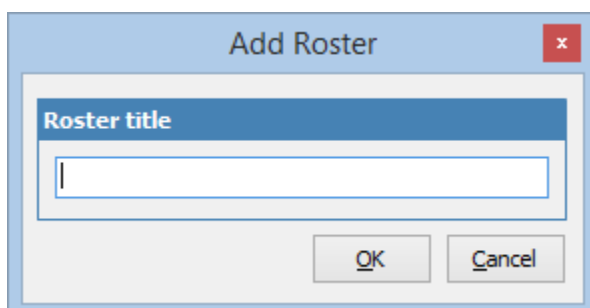
You will be asked for the name of this roster. Enter a name and click "OK".

After entering a roster name, it will be automatically selected in the "Current roster" list. You can have as many rosters as you like, each with a different function. For instance, you might like to keep your Sunday morning roster separate to your Sunday evening roster. In our example we will just use a single roster.
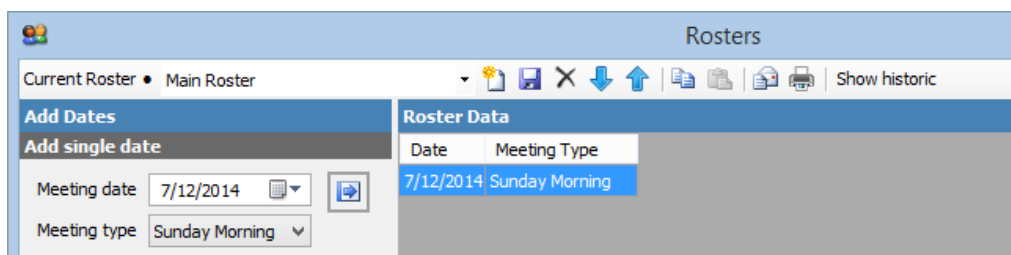
Adding meetings to a roster

After creating a roster, the next step is to add some meeting dates to it. There are two ways to do this:
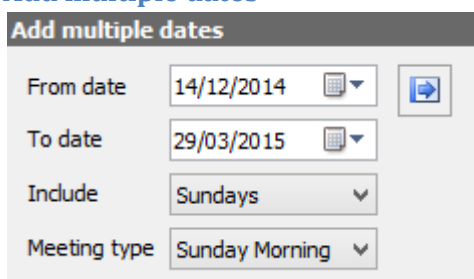
Add single date
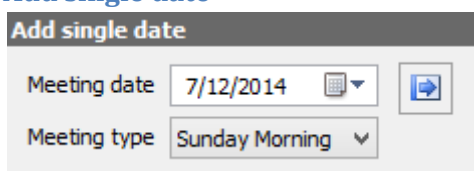
To just add a single meeting, select a date in the "Meeting date" field, select the type of meeting you would like to add, and click on the [icon] button to add the meeting to the roster.
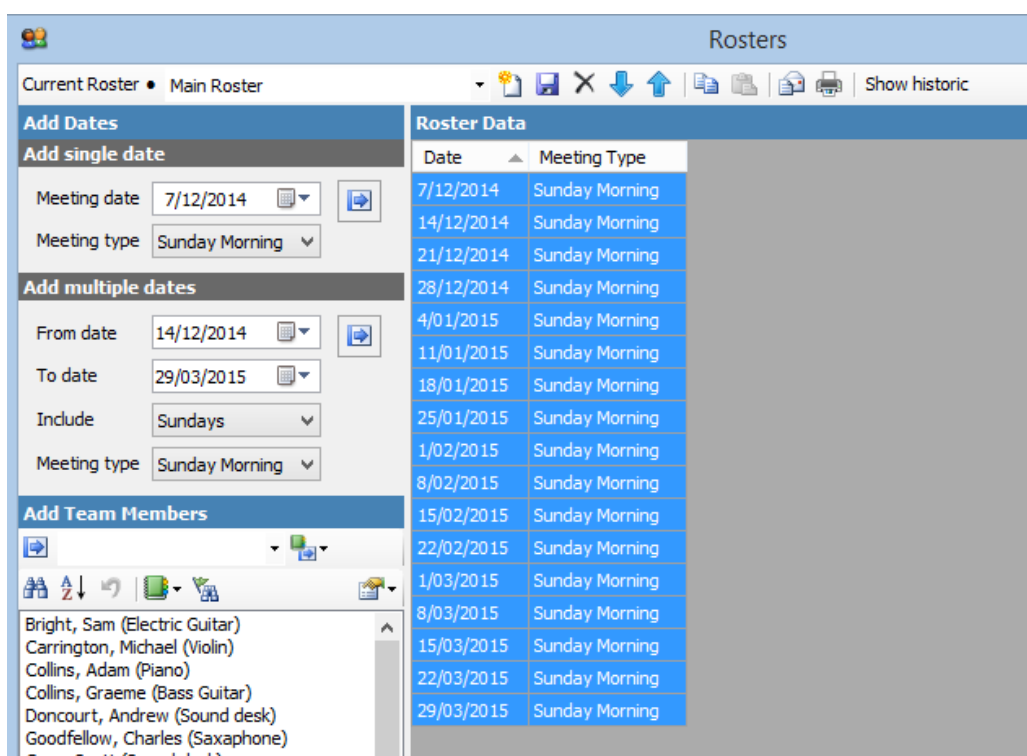

Add multiple dates

To add multiple dates at one go, select the starting date in the "From date" field, and select the ending date in the "To date" field. Then, specify what days to include. The options are:

- [All days] - All days (Sunday through Saturday) will be included.
- Sundays - Only Sundays between the two dates will be included.
- Mondays - Only Mondays between the two dates will be included.
- Tuesdays - Only Tuesdays between the two dates will be included.
- Wednesdays - Only Wednesdays between the two dates will be included.
- Thursdays - Only Thursdays between the two dates will be included.
- Fridays - Only Fridays between the two dates will be included.
- Saturdays - Only Saturdays between the two dates will be included.

Finally, select the meeting type to use for added meetings. Click on the ⬛ button to add all the meetings.
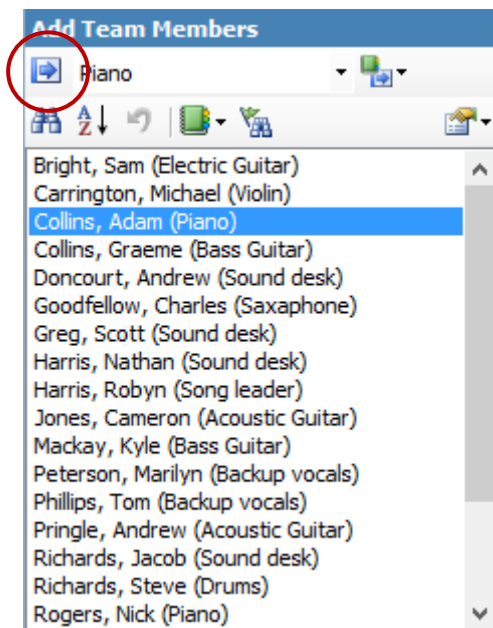

We have now added dates from December 7 to March 29.

Adding team members to a roster

Once meetings are in the roster, we can add team members to it. Select a date in the meeting grid by clicking on it.
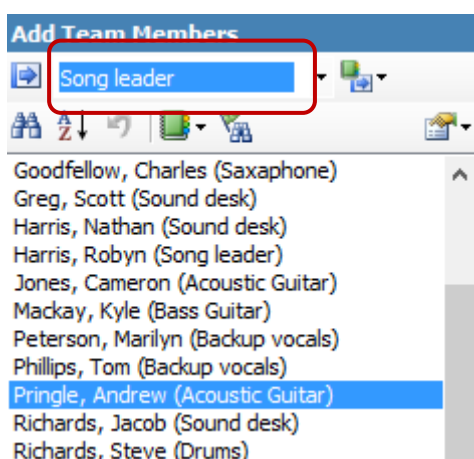
The meeting on December 7 is selected. Now, select a contact from the contact list that you want to add.

Click on the button in the "Add Team Members" section to add the team member in their default role.

Adding a team member in a non-preferred role is simply a matter of overriding the role in the dropdown list before adding them.

In this example, I selected Andrew Pringle, whose default role is "Acoustic Guitar", but I have selected "Song leader" from the override list. When I add him, he will be added in this new role.


You can add team members to multiple meetings by holding down the "Ctrl" key and selecting multiple meetings from the list.

Roster Data			
Date ▲	Meeting Type	Piano	Song leader
7/12/2014	Sunday Morning	Collins, Adam	Pringle, Andrew
14/12/2014	Sunday Morning		
21/12/2014	Sunday Morning		
28/12/2014	Sunday Morning		
4/01/2015	Sunday Morning		
11/01/2015	Sunday Morning		
18/01/2015	Sunday Morning		
25/01/2015	Sunday Morning		
1/02/2015	Sunday Morning		
8/02/2015	Sunday Morning		
15/02/2015	Sunday Morning		
22/02/2015	Sunday Morning		
1/03/2015	Sunday Morning		
8/03/2015	Sunday Morning		
15/03/2015	Sunday Morning		
22/03/2015	Sunday Morning		
29/03/2015	Sunday Morning		

Here I've selected meetings on December 21, January 4, January 18, February 8, and March 1. Now when I add Robyn Harris as a Song leader, she will be added to all these meetings.

Roster Data			
Date ▲	Meeting Type	Piano	Song leader
7/12/2014	Sunday Morning	Collins, Adam	Pringle, Andrew
14/12/2014	Sunday Morning		
21/12/2014	Sunday Morning		Harris, Robyn
28/12/2014	Sunday Morning		
4/01/2015	Sunday Morning		Harris, Robyn
11/01/2015	Sunday Morning		
18/01/2015	Sunday Morning		Harris, Robyn
25/01/2015	Sunday Morning		
1/02/2015	Sunday Morning		
8/02/2015	Sunday Morning		Harris, Robyn
15/02/2015	Sunday Morning		
22/02/2015	Sunday Morning		
1/03/2015	Sunday Morning		Harris, Robyn
8/03/2015	Sunday Morning		
15/03/2015	Sunday Morning		
22/03/2015	Sunday Morning		
29/03/2015	Sunday Morning		

Using this method the roster can be quickly populated.
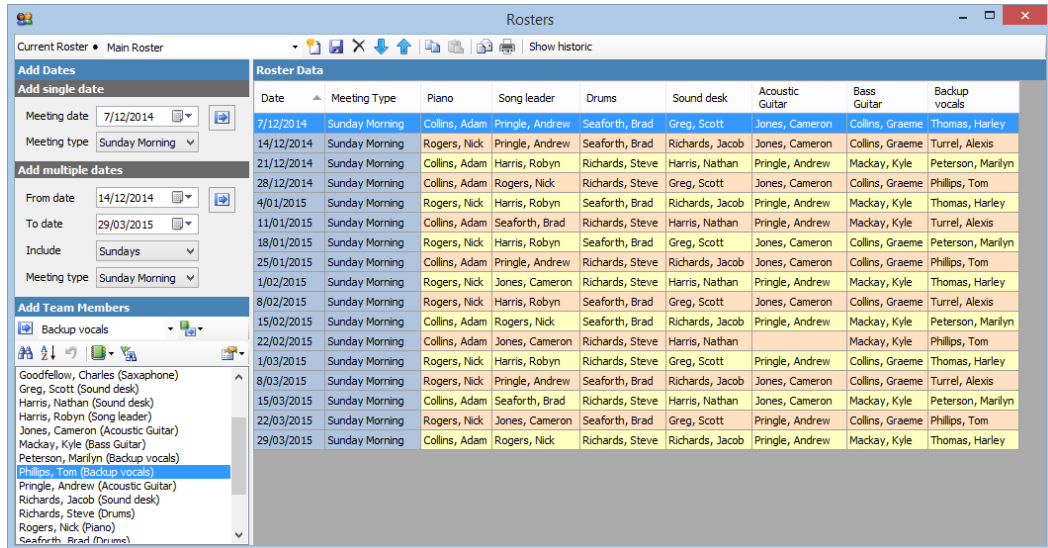
You can add multiple people to roles if required. For instance, if you need multiple people on backup vocals, or the sound desk, simply add the extra people as required.

In this example, I've added Harley Thomas and Tom Phillips to the Backup Vocals role.

Click on the 🖫 button to save the roster.

Sending the roster to participants

Once all the roster information is stored, the roster can be emailed to all the participants. Click on the 📧 button to open the Roster Email dialog.

The roster email dialog allows you to customise the message that is sent to each participant.

In the "Roster settings" section, enter the date range you want to include in the email. By default this will be from the earliest start date in the roster that is in the future, to the last date in the roster. You might, however, only want to send out one month's roster at a time, so you can select a different end date.

By default, the email body will include roster information related to each member. That is, each member will receive a summary of their roles and the dates they are rostered on for. However, if you would like to send everyone a CSV file that contains all the roster information, and can be opened in a program like Microsoft Excel, check the "Attach full roster to email".

In the "Email text" section you can define the content of the email. Each team member will receive a personalised email, and the text defined here works like a mail merge. There are some placeholders you can use to define the position of first names, the start or end dates of the roster information being sent, and the position of personalised roster information.

The default text will include some of these placeholders. You can move them around as you see fit. Once you are happy with the email text, click on the "Send" button to send the emails.
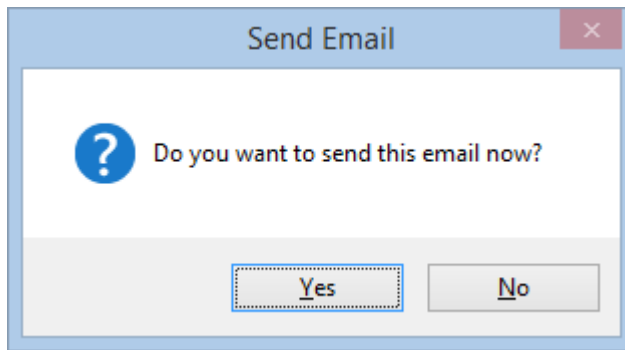
You will be asked to confirm that you want to send the email now. Click "Yes" to start the emailing process.
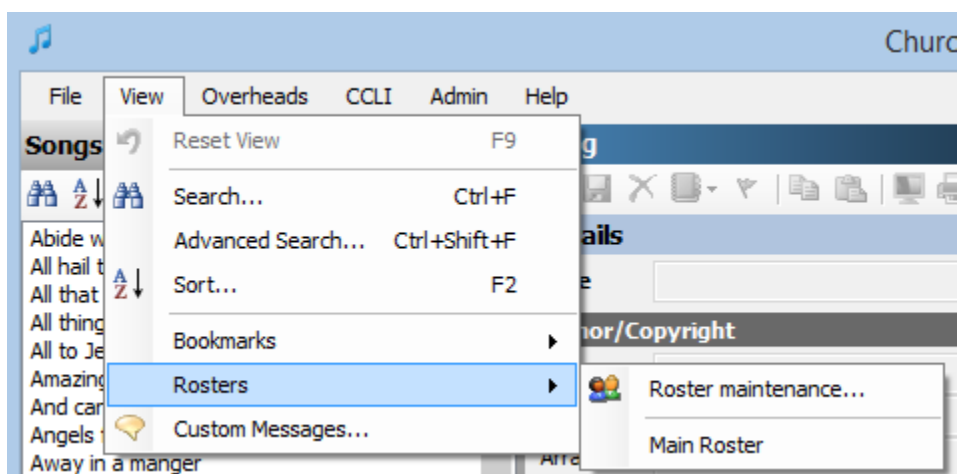
If your SMTP settings are correct, hopefully you should soon see this message:
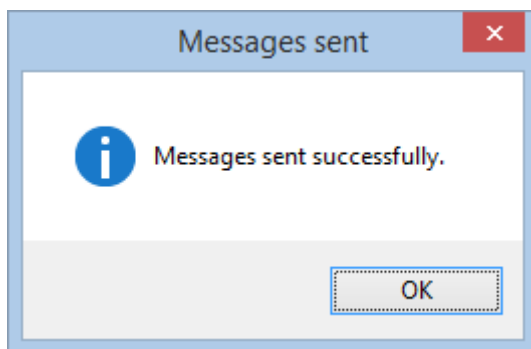
Creating meetings using a roster

Now that we have a roster defined, we can use it to populate the team members for new meetings.

First we have to enable the roster. From the main CMO window, select "View → Rosters". The new roster we just created, "Main Roster", should be visible in the menu.

Click on "Main Roster" to enable this roster for any new meetings.
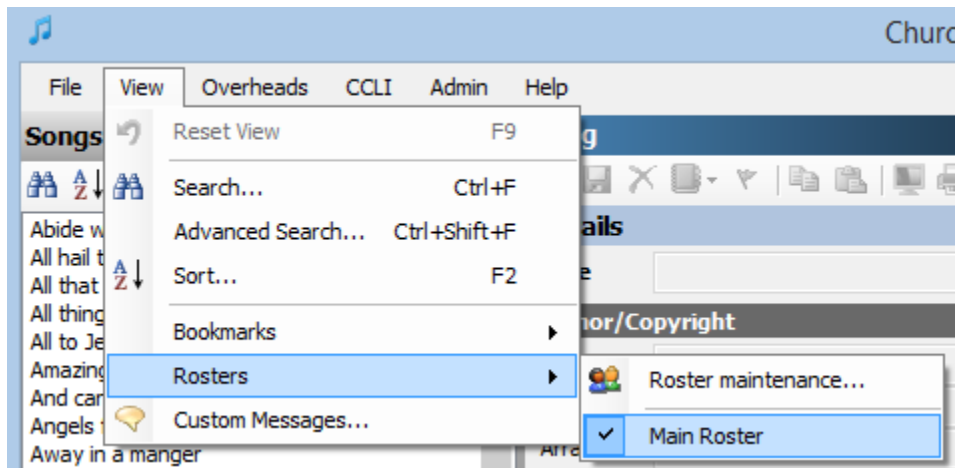
Now, when we create a meeting that matches an item in the roster, the team members will be pulled in automatically.
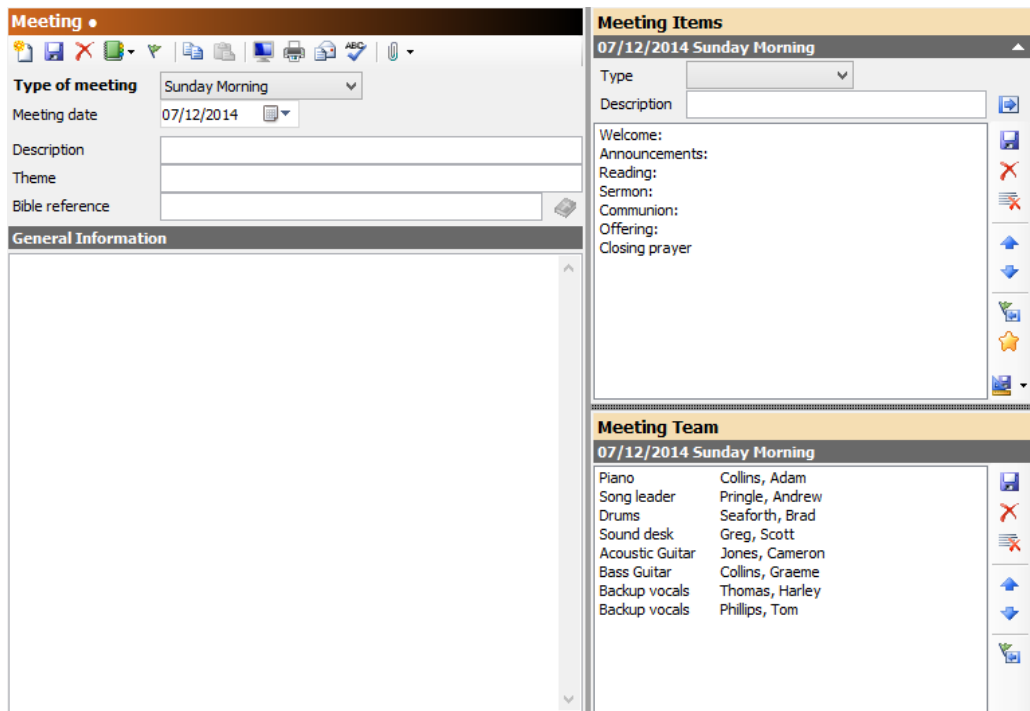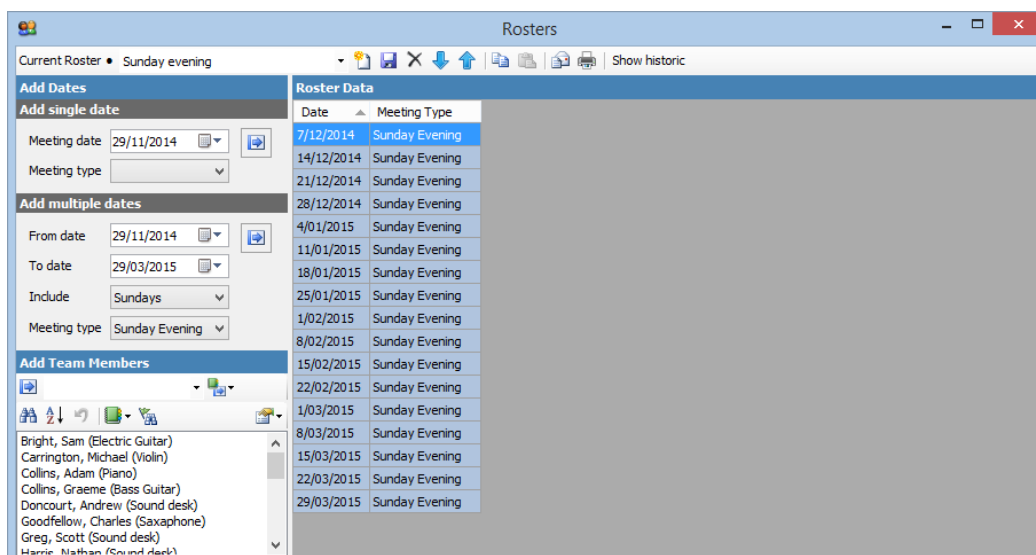

Here I've created a new meeting on December 7. When I saved the meeting, all the contacts from the roster were pulled in to populate the team list.

There might be times when you don't want to use the roster when creating a meeting. In that instance, you would uncheck the rosters you want to disable in the "View →
Rosters" menu, then create the meeting. You can re-enable the roster once the meeting is completed.

Using groups in rosters

It's possible to use contact groups in rosters.

Here, I've created a new roster called "Sunday evening", and added a series of meetings, from December 7 to March 29. To add groups to these meetings, first select one or more meetings.

Next, click on the icon in the "Add team members" toolbar.
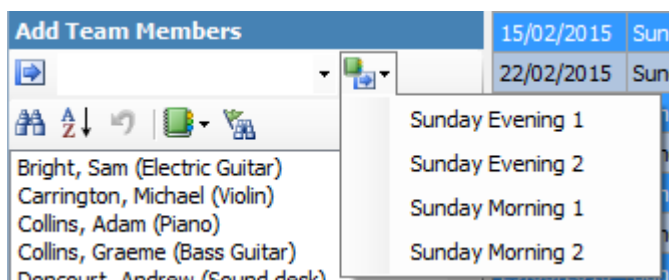
Click on a group to add it to the meetings.

Adding the "Sunday Evening 2" group to the empty slots gives us a roster that looks like this:

Now when we create a Sunday evening meeting, all the current members of the group will be automatically added to the team.
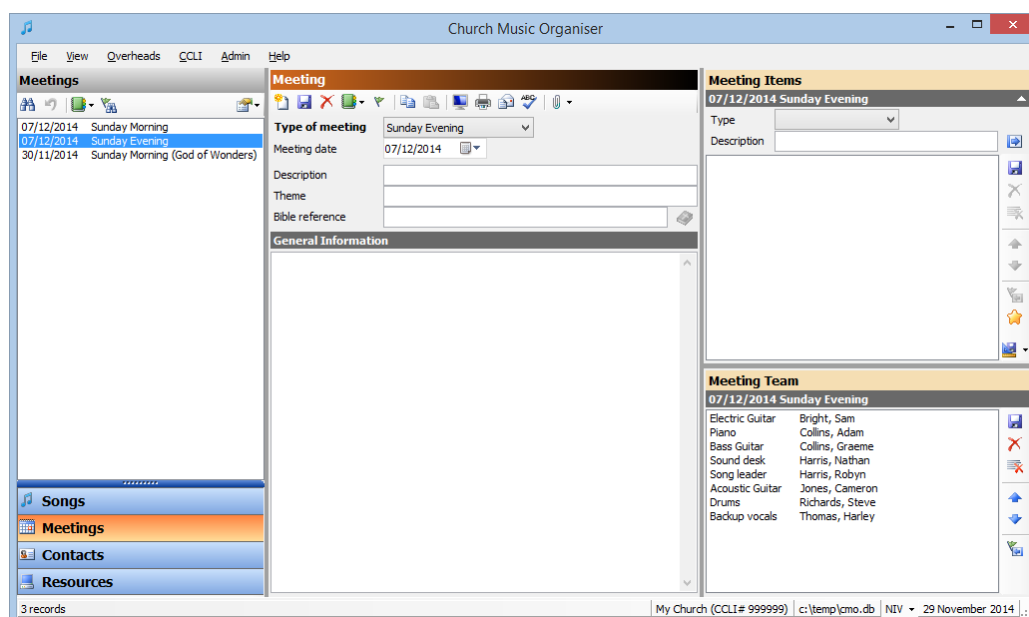
If the group changes before we create the next meeting, the new team list will be used instead. The new meeting will always pick up the current members of the group, which might be quite different to members in the group when the roster was created.

Summary

In this chapter we've looked at how to create rosters, how to add team members to the roster, emailing the roster to team members, and how the information from the roster flows into new meetings. We've also looked at the role of groups in rosters.