

## DUTY ROTA PLUGIN FOR E107

The duty Rota plugin operates in conjunction with the event calendar included in E107's core distribution. It allows you to assign people and other resources to events, and display the list to users.

You can create a separate rota for each event type (or group of event types), and even have selective display options

You can define the resource names and how many are required per event.

Each duty rota may be divided into sections by date, such that only the rota for a defined period is displayed.

### **1 Initial Setup**

You must have the event calendar installed before you do anything with the duty rota plugin.

The first step is obviously to upload the files to your site and install the plugin; this creates the necessary database tables.

The next steps are:

1. Define resource requirements
2. Create duty rota lists

All this information is entered via the plugin's admin menu - there are a number of sub-menus to choose from.

Note that all information can be edited later as required.

#### **1.1 Main Configuration**

A few things need configuring before you start - probably once only:

**Rota can be managed by:** - sets a user class (in addition to the event calendar managers) which can add, amend and delete entries.

**Title for User Page** - currently not used.

**Categories for which duty rota applicable** - determines which event categories the rota *may* be used for. This is used purely to restrict the number of options displayed elsewhere, so can readily be updated whenever you want.

**Include 'category' column in user listing** - determines whether the event category is included in rota listings.

**Allow non-admins to see list of rotas** - if you have more than one duty rota defined, it is possible to display a selection list. If this option is unchecked, 'ordinary' users don't have this option.

**Default Rota** - This field is relevant when the rota is displaying duties for less than two days. If it is filled in, an additional button 'Show whole rota' is displayed. This field must contain the 'query' part of whatever is considered as 'whole rota' - a list name, an end date and optionally a start date.

## **1.2 Display Field Definition**

Before you can create a duty rota, you must define the types of information to be displayed. These fields correspond to the columns in your rota (with the rows corresponding to individual events). Typically these will be slots into which you will later insert names, although you could for example have a column which allocates a room, a vehicle or other equipment.

Once you have defined your fields (resources), you can have multiple rotas, and can select which fields appear in each rota.

Fields are defined (and edited) through the 'Fields' sub-menu. On entry you are shown a list of existing fields, which you can select for editing or deletion.

When adding/editing, you enter the following parameters:

**Field Title** - this appears as the column heading - for example 'Tea Stall', 'Marshals' or 'Vehicle'.

**Field Width** - the maximum length of each entry line - defaults to 30 characters if not set. It is a good idea to keep this as small as possible to avoid your rota display going off the edge of the screen.

**Text Lines** - used to split up each entry. Intended so that you can enter, say, a number of names in one box, with them appearing on separate lines.

**Single Text Box** - if checked, the field is a multi-line 'free format text' area. Its width and height are determined by the preceding two parameters. It is intended for comments, explanatory notes etc.

**Regex** - not implemented at present, but in future versions you will be able to enter a regular expression in this box which is used to determine the validity of the entered information.

**Field Description** - may be shown as additional explanation.

**Note:** The order in which you enter fields doesn't matter (and it doesn't matter if you have to add more later). You control what is displayed, including the order in which it is displayed, when you define the rota.

## **1.3 Rota Definition**

You can now define a duty rota; this determines which event types are included, which user classes can see them, and so on. (To add a new list, enter the shortcode and title, and click on 'Add new list').

**Shortcode** - an abbreviation of up to 8 characters which can be used to identify the rota in URLs and so on.

**Title** - the title of the rota

**Comment Text** - if entered, this is displayed immediately under the title.

**Event Categories** - check boxes determining which categories of event use this rota

**Edit Class** - the user class which can update the rota (in addition to event calendar admins)

**View Class** - the user class which can see the rota (without editing it). (Note that users must also have access rights to the individual events).

**Contact Name** - optional field defining a contact name.

**Contact Email** - optional - accessed by clicking on the contact name. If the email address doesn't contain the '@' character, it is treated as an 'organisation' email address, which uses the `mailto:` bcode.

**Field List** - Shows which of the defined fields are included in this list. To add a field, select it in the drop-down box and click 'Add Field'. Once in the list, fields can be reordered using the arrows (the big blue arrows are 'top' and 'bottom'), and deleted.

## **1.4 Future Menus**

(Not yet implemented)

**List from today** - if checked, the user sees the rota starting at the current day. If unchecked, the user sees the complete rota (subject to the date blocks which can be defined).

**List start date** - sets the earliest date which will be displayed in the current rota. May be overridden if the 'list from today' option is checked, and the current date is after the one set here.

**List\_divide\_date** - sets the last date to be included in the current rota period - later entries fall into the next rota period.

**Show Next** - if checked, 'ordinary' users can see the rota for the next period.

This method of creating duty rotas allows you to have several 'views' onto the same basic information. For example, if you are organising a major event, you may have several sections of people - catering, security, admissions say. You can create rotas which show only the people assigned in that one section, while still also having a 'master' rota showing everyone.

## **1.5 Access to the Rota for Users**

Once a rota has been set up, users will require access both to manage the information and to view it. These links must be set up manually, in the form:

`yoursite/e107_plugins/rota_menu/rota.php?DR.enddate.startdate`

where DR is the unique ID code which was set.

The startdate defaults to 'today' if not entered.

The enddate defaults to a year hence if not entered.

Start date and end date may be entered in one of three forms:

yyyymm  
yyyymmdd  
now+nn

If no list code is specified, admins are always presented with a list of rotas to choose from. Users may also see this list, if the option is specified in the configuration.

### **1.6 Shortcode for Event Calendar**

There are two shortcodes, DR\_EV\_NAMES and DR\_CHECK , which may be added to individual event display in the calendar (event listing). Syntax is:

```
{DR_CHECK=NAME}  
{DR_EV_NAMES=NAME}  
{DR_EV_NAMES=NAME1,NAME2}
```

where 'NAME' is the assigned shortcode (name) for the rota. (N.b. - no quotes).

For event categories which are included in the rota:

DR\_CHECK inserts an icon in the event details which, when clicked, displays the rota for that day.

DR\_EV\_NAMES includes details from the rota as part of the event listing, with a link to the full duty rota. If the second syntax, with two names, is used, the first name specifies the list used to display details with the event, and the second defines the list to be used if the user clicks on the link to the duty rota.

### **1.7 Shortcode for Forthcoming Events Menu**

There is a shortcode, DR\_NAMES , which may be added to each event in the forthcoming event listing. Syntax is:

```
{DR_NAMES=NAME}
```

where 'NAME' is the assigned shortcode (name) for the rota. (N.b. - no quotes).

For event categories which are included in the rota, this will list non-empty fields with their titles.

All fields from the specified list are displayed, so if necessary create a list with exactly the number of fields to be displayed.

## **2 Updating the Rota**

When a user who has update rights views the rota, the event date is a clickable link which brings up the current information for entry or editing.