
Self-Roster - Assessment
5 Cheltenham Way,
Newton Aycliffe,
County Durham,
DL5 4YD.

Tel: 01325 312157, **Mob:** 07932 186843, **Email:** sales@self-roster.co.uk

Request for Free Assessment

The quickest and easiest way to get started is to use this form to send an example of your existing rota for our assessment of your needs - we can then ensure that you get at the full potential of our system. We will do the initial set-up for you, work with you to re-create your example rota on our system and send you a quotation. You are then free to focus on the planning - which is straight forward.

Print out the form, complete it and send it to the above address (or scan & email it) with an example of your existing rota. Please answer as many of the questions as you can but don't worry if you are uncertain or might change your mind – they are not critical but do help us to understand your needs. You *should* however, include an example of your existing rota or enough details of your needs for us to create an example.

<u>Contact details</u>	
Name:	Position:
Department:	Organisation:
Address:	
Email:	Telephone:
<u>Typical Rota</u>	
How many staff do you typically need on one rota? <i>e.g. 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, etc.</i>	
What period of time will one rota cover? <i>e.g. 1,2,3 or 4 weeks, 1, 2 or 3 calendar months.</i>	
Counting hours planned for each member of staff. <i>How important? 0 to 5</i>	
Counting staff covering each shift. <i>How important? 0 to 5</i>	
Identifying which staff cover which shifts. <i>How important? 0 to 5</i>	
<u>Admin Needs</u>	
Who will do the symbol set-up & administration? <i>e.g. I will do it, I have an admin person, I want self-roster to do it.</i>	

Will you print your rota to display it on a notice board? e.g. Yes, No, Not sure, Initially but not later.	
Will you allow staff to view rotas via the Internet. e.g. Not initially, Possibly later.	
Will you allow staff to view rotas via their mobile phone. e.g. Not initially, Definitely later.	
Allow staff to make requests via the Internet. e.g. Yes, No, Possibly later.	

Planning Needs

Who and how many will do the planning? e.g. I will do it, I have two planning people.	
Once completed do you ever change a rota. e.g. hardly ever, occasionally, frequently, every day.	
Will you want to export rotas to MS excel? e.g. Yes, No, Possibly.	
Which type of printed rota are you likely to prefer? A) The default view showing total hours and shift cover. B) The cover view showing the team covering each shift.	
Do staff generally work the same shifts in each rota period? e.g. No, Yes, with variations each month, Always different.	

Multi Rota Needs

How many rotas of staff are you planning for? e.g. One initially, one rota for each of 10 departments later.	
Might you want private hosting and branding for your organisation? e.g. www.ourcompanyrota.org.uk	

Your Example

What is your current method of planning and what improvements are you looking for?	
Anything else we will need to know? e.g. Symbols or abbreviation in your rota.	

Please Check

<input type="checkbox"/> Completed contact details? <input type="checkbox"/> Answered the above questions? <input type="checkbox"/> Enclosed a typical example of existing rota?	
Signed:	Date:

