



Ministry Scheduler Pro

# Setup Guide

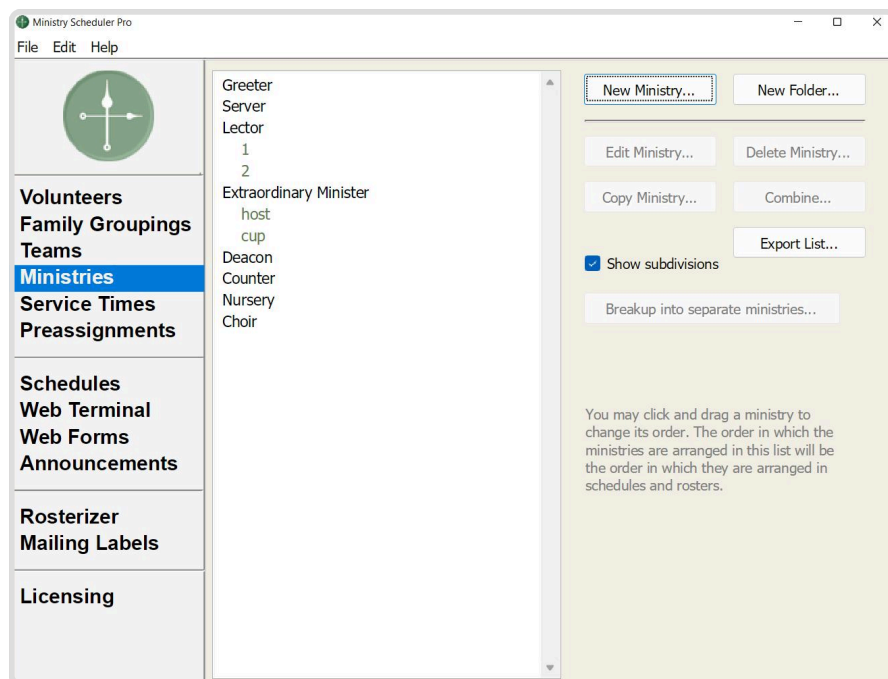


## 1

# Enter your ministries

Ministry refers to any task performed at a service or event. You can specify how many people from each ministry should be scheduled for each of your services or events.

[Watch this video](#) to learn how to define ministries and configure their settings.



TIP

## Skills and tasks

**Subdivisions** are used to distinguish between different positions within the same ministry by task or skill, such as scheduling the Extraordinary Ministers as host or cup. You can specify different volunteers to be qualified to serve in each subdivision you create. Each volunteer can be designated for more than one subdivision when appropriate.

To learn more about labeling different positions in a ministry, [watch this video](#) or [read this article on when to use subdivisions](#).

Titles are another way to distinguish multiple types of volunteers within a single ministry, such as by gender or experience level. However, unlike subdivisions, each volunteer can have only one title in a ministry. To learn about titles, [watch this video](#).

1. Click on the Ministries pane.
2. Click the “+” button and select “New ministry.”
3. Name your ministry.

## 2

## Enter your services

Create a service for each of your weekly services. You can also create a service for any other event that needs to be scheduled, such as nursing home visits, child care shifts, or meal distribution.

[Watch this video](#) to learn more about weekly, monthly, and yearly services.

The screenshot shows the Ministry Scheduler Pro application window. On the left is a sidebar with a navigation menu. The 'Service Times' option is highlighted in blue. The main area displays a table of services with columns for 'Service time' and 'Total required volunteers'. The table is divided into 'Weekly Services' and 'Yearly Services' sections. The 'Weekly Services' section lists services for Sunday, 9:00 AM and Sunday, 11:00 AM, with roles like Greeter, Server, Lector - 1, Lector - 2, Extraordinary Minister - host, Deacon, Counter, and Nursery. The 'Yearly Services' section lists services for March 2, 7:00 AM: Ash Wednesday and March 2, 9:00 AM: Ash Wednesday, with roles like Greeter, Server, Lector - 1, Lector - 2, Extraordinary Minister - host, and Counter. On the right side of the table, there are buttons for 'New Weekly...', 'New Monthly...', 'New Yearly...', 'Edit Service...', 'Delete Service...', 'Show ministries' (checked), and 'Export List...'. A note at the bottom right states '\* title rules apply'.

1. Click on the Service Times pane.
2. Click the “+” button and select “New weekly service.”
3. Enter the day and time of service and how many volunteers you need from each ministry.



TIP

## Special services

Do you have services that only happen once a year, like holy days? Even if special services don't occur on the same date each year, you can create a yearly service for those events. Doing so allows you to “set it and forget it.” That way, you know how many volunteers you needed last year, and you can always update settings if your needs change!

The screenshot shows the Ministry Scheduler Pro application window with the 'Yearly Services' section selected. The table lists services for specific dates: March 2, 7:00 AM: Ash Wednesday; April 15, 7:30 PM: Good Friday; April 17, 7:30 AM: Easter Sunday; and April 17, 9:00 AM: Easter Sunday. Each entry lists roles and the total required volunteers. The right sidebar contains buttons for 'New Weekly...', 'New Monthly...', 'New Yearly...', 'Edit Service...', 'Delete Service...', 'Show ministries' (checked), and 'Export List...'. A note at the bottom right states '\* title rules apply'.

## Enter your volunteers

**Volunteer** refers to any person who will be scheduled in any of your ministries. There are three ways to go about entering your volunteers: manually, by importing from an existing file, or by synchronizing with your church management software.

Manually enter volunteers to customize their complete profile

[Watch this video](#) on manually entering volunteers and setting up their profiles.

The screenshot shows two tabs: 'General Information' and 'Scheduling Parameters'.

**General Information:**

- First Name: [text box] ☐ Is a group
- Last Name: [text box] Title: [text box]
- Family: None [button: New...]
- ☐ Bind phone and address to family's
- ☐ Bind email address to family's
- ☐ Bind service time preferences to family's
- Phone: [text box] [dropdown arrow]
- Cell: [text box] [dropdown arrow]
- E-mail: [text box] [dropdown arrow]
- ☐ This volunteer has internet access
- Address: [text box]
- Comments: [text area]
- [button: Edit custom fields...]

**Scheduling Parameters:**

- Ministry qualifications: ☒ Only show qualified ministries
- [List box for ministry qualifications] [button: Add] [button: Remove] ☐ Sub only
- Service preferences: ☐ Schedule only at these times
- [List box for service preferences] [button: Add] [button: Remove] [button: Options...]
- Preferred serving frequency: normal [dropdown arrow]
- Can't serve dates / times: [text box] [button: Add...] [button: Remove] [button: Clean...]
- ☐ Preassigned and manual scheduling only (don't auto-schedule)
- ☐ Make this volunteer inactive for now (don't schedule at all)

1. Click the "+" button on the right side of the Volunteers pane.
2. Add the volunteer name, email, qualified ministries, and any other information you want to track about that volunteer.

**Import** volunteer contact information and custom fields from a .txt, .csv, .xls or .xlsx file. We recommend importing one spreadsheet per ministry so you can quickly qualify volunteers for their ministries during import.

[Watch this video](#) to learn how to set up a spreadsheet and import your volunteers.

The 'Import Volunteers' dialog box contains the following information:

To use the Import Volunteers feature, you must have your volunteer information in a text (.txt) file or comma separated value (.csv) file. See the Ministry Scheduler Pro documentation for detailed instructions on how to create a suitable .txt or .csv file from an existing roster or data export.

Select the fields you are importing and then use the Add button below to move them into the list on the right. Make sure you add the fields in the exact order they appear in your .txt or .csv file.

**Available fields:**

- Full Name
- Phone
- Cell
- Address (Street only)
- Address (City, State, Zip)

**Fields to import:**

- First Name
- Last Name
- Email

[button: Add >>] [button: << Remove]

☐ Show all options

**Ministry qualifications:** (click to change)

Greeter	Not Qualified
Server	Not Qualified
Lector - 1	Not Qualified
Lector - 2	Not Qualified
Extraordinary Minister - host	Not Qualified

Each imported volunteer will get these ministry qualifications.

☒ Import new volunteers and update existing volunteers

☐ Update information for existing volunteers only (do not import any new volunteers)

[button: Cancel] [button: Import...]

1. Go to File - Import Volunteers
2. Add the fields from the available fields to the fields to import in the order they appear on your spreadsheet
3. Optionally qualify everyone from the spreadsheet in a particular ministry
4. Click import and choose your spreadsheet

## Enter your volunteers

**Synchronize** volunteers to extract information directly from your church management software. MSP synchronizes with most popular church management programs, including ACS, PDS, Servant Keeper, ParishSOFT®, and more. With the MSP Plus Edition, you can also use the [MSP API](#) to connect with any database.

[Watch this video](#) for a walkthrough of the full synchronization process.

Synchronize Volunteers

This feature allows one-click synchronization of volunteer data from most popular church management software (and easy importation from other ministry schedulers). Since this is the first time this feature has been used a few easy steps need to be taken to set it up. Afterwards updating your volunteer information from your church management software takes just one click.

The follow is a list of programs for which MSP supports one-click synchronization. Please select the software you use from the list and then click Continue.

Access ACS

Parish Data System (PDS)

ParishSOFT

Servant Keeper 6

Servant Keeper 7

Servant Keeper 8

Logos Management Software

Note: If your church management or old scheduling software is not in this list, you may provide us with a sample database file and we can determine if we can add one-click synchronization for your software. Contact us at [support@rotundasoftware.com](mailto:support@rotundasoftware.com) for assistance.

Cancel

Continue >>

1. From the File menu, choose “Synchronize volunteers with...”
2. Follow the steps to locate and sync your database.

**TIP**

## Recommended settings

**Service time preferences** in the volunteer profile allow the auto-scheduler to prioritize the service preferences in the order you added to this list. If you do not check the “Schedule only at these times” box, MSP may schedule the volunteer at other services when needed.

**Preferred serving frequency** can be used to set a request on how often the auto-scheduler places a volunteer to serve. However, we highly recommend leaving most of your volunteers’ frequency set to “Normal” to allow the auto-scheduler the most flexibility when creating your schedule.

## 4

## Make a schedule

Once you have configured MSP with your ministries, service times, and volunteers, you are ready to create an empty schedule. It is most common to create schedules on a monthly or quarterly basis.

[Watch this video](#) for an overview of how to create and fill a schedule.

1. Click on the Schedules pane
2. Enter a start and end date for your schedule
3. Click the “Create” button

MSP accommodates many forms of scheduling, and you can mix and match to find the right method for your church.

- **Manual:** [Handpick the volunteers](#) you want to serve and get notification of any potential conflicts
- **Preassignments:** [Set volunteers to repeat](#) on a pattern
- **Teams:** [Group individuals in a ministry](#) who should always serve together, and then set a pattern or let the auto-scheduler place them
- **Auto-scheduler:** [Click the "Commence Scheduling" button](#) and let MSP assign your volunteers based on their preferences and settings



TIP

## Scheduling reports

Once your schedule has been filled, MSP's distribution reports give you a bigger picture of who's been scheduled, how often, and in which ministries.

[Watch this video](#) for an overview of how to use scheduling reports to ensure fair distribution.

Ministry Distribution Report

☒ Show numbers for this schedule only 
 ☐ Show numbers from 5/1/22 to 6/9/22

☐ Show totals only 
 ☐ Show individual ministries 
 ☒ Show only Greeter, Server, Lector, Extraordinary Minister

☐ Include only these services: <click to specify>

Volunteer	Greeter	Server	Lector	Extraordinary Minister	Total
Bradley, Roy	7	-	-	-	7
Anderson, Shannon (+/-)	0	5	-	-	5
Carr, Julia (+)	0	-	4	-	4
Stephens, Chris	1	-	-	3	4
Stewart, Geraldine	2	-	-	2	4
Tucker, Emily	1	-	-	3	4
Young, Jack	1	-	-	3	4
Bradley, Angela (-)	1	-	2	-	3
Elliott, Roger (+/-)	0	-	3	-	3
Hanson, Raina	1	-	1	1	3
Harvey, Don	1	-	2	-	3
Holland, Anita	1	-	-	2	3
Horton, Jacqueline	1	-	2	-	3
Howell, Marvin	1	-	-	2	3
Kim, Antonio	1	-	-	2	3
Lambert, Mary	1	-	2	-	3
Lane, Tracy	1	-	2	-	3
Lewis, Larry	1	-	-	2	3
Matthews, Virginia	1	-	2	-	3
Mccoy, Janice	0	-	-	3	3
Mcdonald, Curtis	0	-	-	3	3
Moore, Brandon	1	-	-	2	3
Palmer, Dawn	0	-	-	3	3
Patterson, Paul	1	-	2	-	3

To quickly see how many times each volunteer has been scheduled in each ministry, choose “View Ministry Distribution...” from the Reports menu.

## 5

## Save and export

Once you have configured MSP with your ministries, service times, and volunteers, you are ready to create an empty schedule. It is most common to create schedules on a monthly or quarterly basis.

[Watch this video](#) for an overview of how to create and fill a schedule.

This schedule will be saved as a shared file that can be accessed by all computers under your license. To open it later, go to the Schedules pane by clicking on that heading on the left hand side of MSP's main screen.

Please choose a name for this schedule:

Schedule Aug 1 - Aug 31

☒ Make this schedule live now so volunteers can see their assignments online  
When a schedule is **live**, volunteers can see their scheduled times in the Web Terminal and sign up for unfilled positions. (If you don't make this schedule live now, you can do so later by choosing "Make schedule live" from the File menu)

☐ Customize the online layout ("Live Schedule Post") now [\(what's this?\)](#)

☒ Just use the default layout for now (can be changed later)

Cancel OK

Post the schedule online via the Web Terminal:

1. Choose "Save" from the File menu to make the schedule live so that volunteers can see it on the Web Terminal, and create a **Live Schedule Post** to choose the layout your volunteers see in the Full Schedules tab.

To export your schedule to print:

1. Choose "Export" from the File menu.
2. Select your format and save it to your computer.



TIP

## View the Web Terminal

The **Web Terminal** is a website where volunteers can access their schedules, request substitutes, and update their profiles.

1. Go to the Web Terminal pane.
2. Click "Login as" in the lower right corner.
3. Select a volunteer and click "Login now."
4. A new window will open where you can now log in as the volunteer.

Once you purchase MSP, use the [Web Terminal checklist](#) to customize the Web Terminal in a few easy steps.

## 6

## Set up the Web Terminal

Use the [Web Terminal Checklist](#) to set up and customize the Web Terminal.

1. Go to the Web Terminal pane
2. Click on the Web Terminal Settings button

## 7

## Onboard volunteers

Use the Announcements pane to [send an email introducing MSP](#) and optionally [invite volunteers to attend a training night](#).

1. Go to the Announcements pane and load one of the following Preconfigured Templates:
  - **Intro Email:** Update Request: this template is best used if you have not yet completed a schedule and wish to collect availability before creating and posting one online
  - **Intro Email:** First Schedule: this template is best used if you have just created and posted a completed schedule online
2. Make any manual edits to the template
3. Preview the email before sending it by clicking the Preview button
4. Send the email to all your volunteers

If necessary, [grant Leaders access](#) and invite them to get familiar with their [online privileges](#).



# Congratulations! You have completed the setup of MSP.

For additional assistance, visit our [Help Center](#). There you will find:

- [A map of the MSP scheduling cycle](#) with links to resources in each step of the process.
- [Video tutorials](#) on specific features, such as enrollment forms, text messaging and email announcements
- [Step-by-step instructions](#) for many common questions and setups

## Need additional help?

Contact support by sending in your data files (Help - Send Data Files to Tech Support) or call us at **888-622-0949**.



**Ministry Scheduler Pro**  
Effective Ministry Scheduling

