

# Quick Start Guide



**Ministry Scheduler Pro**  
Effective Ministry Scheduling

## 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](#).

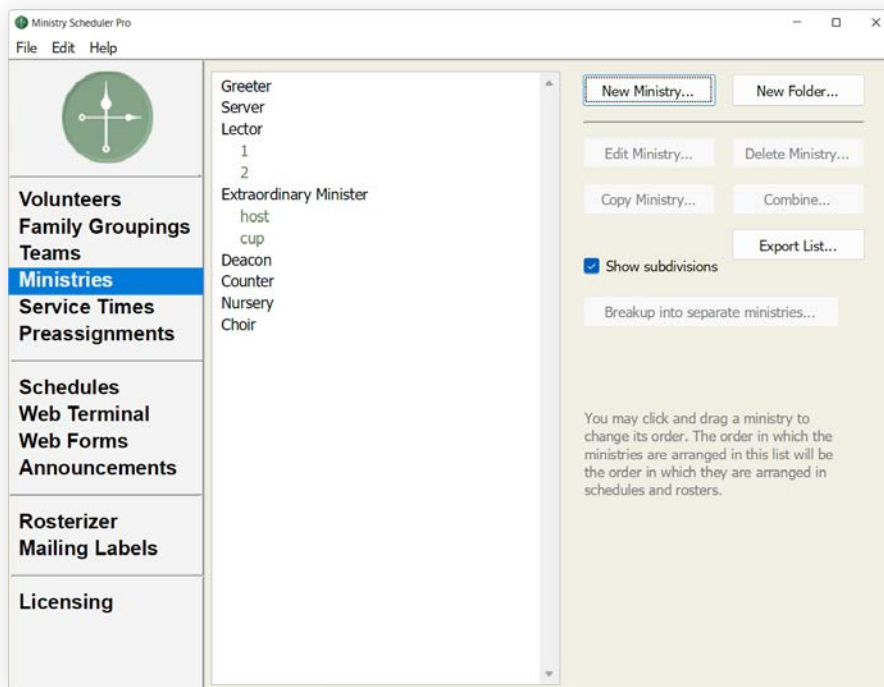
**Titles** are another way to distinguish multiple types of volunteers within a single ministry, such as by gender or experience level. However, unlike subdivisions, each volunteer can have only one title in a ministry. To learn about titles, [watch this video](#).

# 1

## 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.



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

## 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 'Yearly Services' section of the software. It lists several services with their respective volunteer requirements:

Service time	Total required volunteers
<b>Yearly Services</b>	
March 2, 7:00 AM: Ash Wednesday	7
Server	1
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	2
Counter	2
April 15, 7:30 PM: Good Friday	9
Greeter	2
Server	2
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	3
April 17, 7:30 AM: Easter Sunday	11
Greeter	2
Server	2
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	5
April 17, 9:00 AM: Easter Sunday	16
Greeter	4
Server	2
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	8

\* title rules apply

## 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 'Weekly Services' section of the software. It lists several services with their respective volunteer requirements:

Service time	Total required volunteers
<b>Weekly Services</b>	
Sunday, 9:00 AM	14
Greeter	2
Server	2
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	2*
Deacon	2
Counter	2
Nursery	2
Sunday, 11:00 AM	14
Greeter	2
Server	2
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	4
Counter	2
Nursery	2
Choir	(6)
<b>Yearly Services</b>	
March 2, 7:00 AM: Ash Wednesday	7
Server	1
Lector - 1	1
Lector - 2	1
Extraordinary Minister - host	2
Counter	2

\* 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.

# 3

## 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.

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

Edit volunteer: Shannon Anderson

GENERAL & SCHEDULING

CUSTOM FIELDS

First name: Shannon  Is a group

Last name: Anderson Title:

Family: The Bowman Family

Phone: 14159728508

Cell: 4158398020

Email: raina@rotundasoftware.com

Address: 1047 Ashland Ave, San Francisco, CA 94501

Comments:

Qualified ministries

Greeter	Qualified	Add
Server	Experienced	Remove
Deacon	Substitute	
Choir	Qualified	

Service Preferences

1. Sunday, 9:00 AM

Schedule only at these times

Preferred frequency of scheduling: 1 times per week

Can't serve dates / times

Preassigned and manual scheduling only (don't auto-schedule)

Make this volunteer inactive for now (don't schedule at all)

Cancel OK

3  
cont'd

**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.

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.

Import Volunteers

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

Show all options

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

Each imported volunteer will get these ministry qualifications.

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

Import new volunteers and update existing volunteers

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

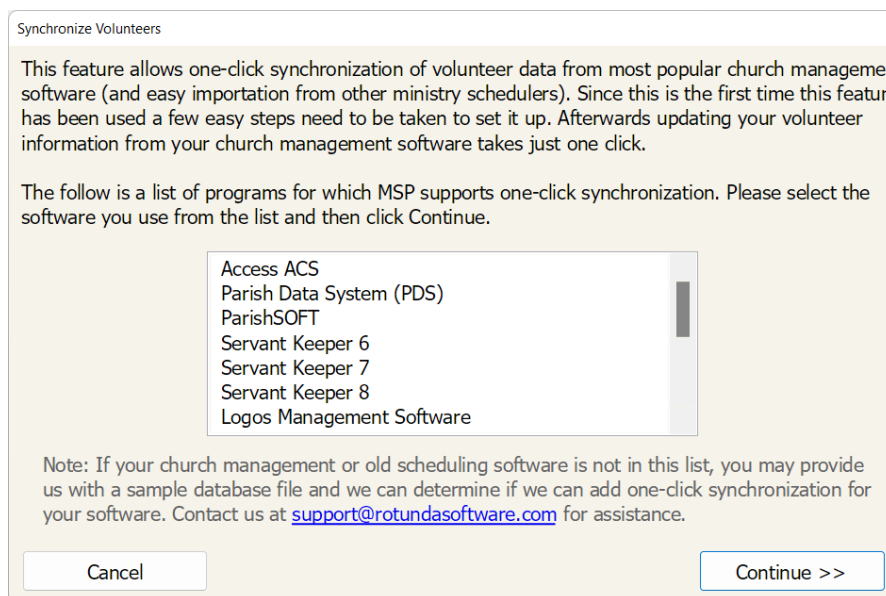
Cancel Import..

# 3

cont'd

**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.



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

## TIP

### Recommended settings

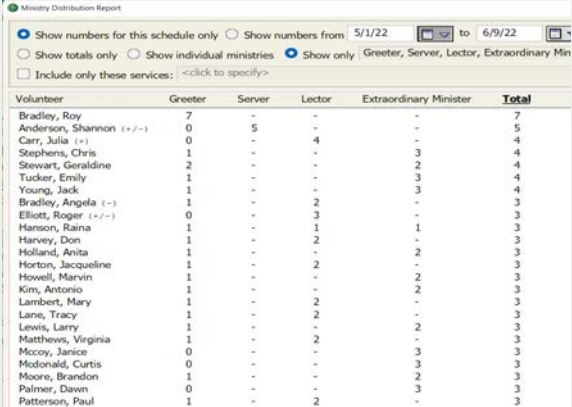
**Service time preferences** in the volunteer profile allow the auto-scheduler to prioritize the service preferences in the order you added to this list. If you do not check the “Schedule only at these times” box, MSP may schedule the volunteer at other services when needed.

**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.

## 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 Min

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, Marim	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.

## 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 a button and let MSP assign your volunteers based on their preferences and settings

# 5

## Save and export

Once you have filled your schedule, you can choose how you would like to distribute it.

[Watch this video](#) for more information on posting and printing schedules.

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.



# Congratulations!

You have completed the setup work of entering your ministries, service times, and volunteers. You have also seen how easy it is to create a schedule in just a few minutes. You should now have a clearer idea of how MSP can work for your church.

For more help getting started with MSP, 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, which outlines the process of implementing and using MSP
- [Video tutorials](#) on specific features in the program, including those not covered in this guide, such as enrollment forms as well as text message and email announcements
- [Step-by-step instructions](#) for many common questions and setups
- [The user manual](#), which will help explain the many different options found within the program

## 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.

