

# Volunteer Scheduler Pro

## Quick Start Guide

### Introduction

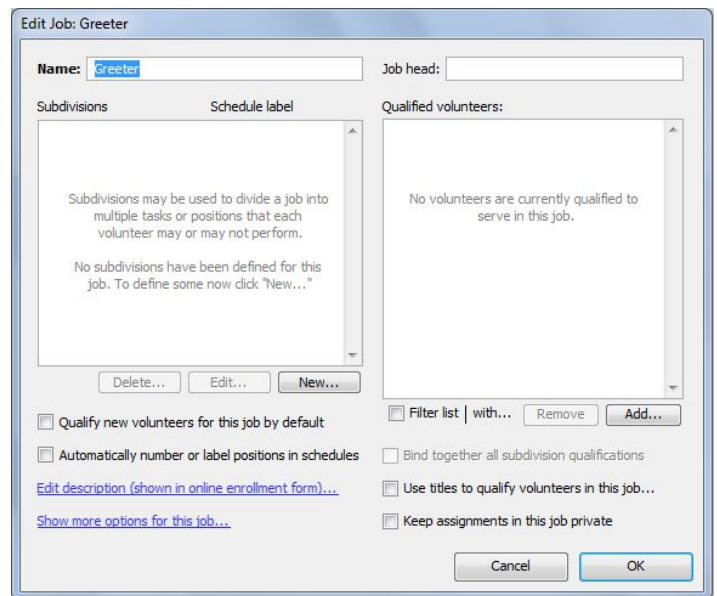
Welcome to Volunteer Scheduler Pro! This Quick Start Guide will guide you through the process of creating schedules, publishing opportunities and filling shifts in just a few easy steps. We recommend that you print out this guide by choosing “Print...” from the File menu and read it through while you get started with VSP.

### Step 1: Entering your jobs

The first step to getting started with VSP is to specify the jobs you will be scheduling. A job is any task or role that is performed by your volunteers at any of your shifts. For each shift, you will be able to specify how many volunteers in each job should be scheduled.

To create a job, first click on the Jobs pane on the left hand side of VSP’s main screen (the screen which appears when you launch the program). Then click the “New Job...” button. In the dialog that appears enter a name for the new job (e.g. “Receptionist”, “Usher”, etc.).

There are several options available on the left hand side of the dialog that affect how positions in the job appear and are scheduled. These options include separating the job into multiple “subdivisions”, numbering positions in the job, scheduling the same volunteer for the job for a week at a time, and more. These options are not discussed in this Quick Start Guide, but you may click on them inside VSP to see a short explanation of what each option does.



For the purposes of getting started with VSP, just enter the name of the job in the “Name” field, and then click OK. Then click the “New job...” button again to repeat this process for each job you will be scheduling.

### Step 2: Creating a schedule and shifts

After you've entered all your jobs, click on the Schedules pane on the left hand side of VSP's main screen and enter the start and end dates for a schedule. Clicking the calendar icons to the right of the fields will produce calendars from which you can select the dates. After you have entered your schedule’s start and end date, click the “Create...” button. A window will open that contains a blank schedule spanning the date range you specified. Note that all the shifts and jobs that will occur within this time period will be included on this “master schedule.” Don’t worry, you can optionally print or

post online separate “views” of the master schedule, by date, job or shift. Check out [this resource](#) for more information on creating separate live schedule posts.

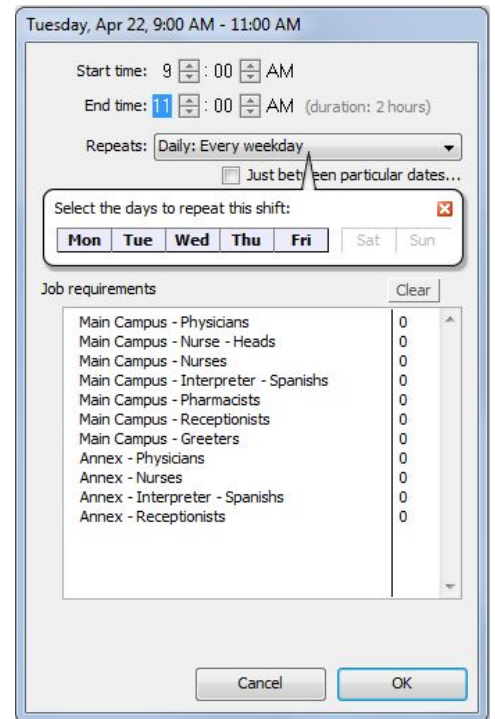
Now you'll want to create your shifts. Click on a day in the calendar on which one of your shifts take place, and then click the “New Shift...” button at the top of the window.

In the dialog that appears, set the start and end time for the shift by clicking on the hours or minutes and typing in the correct value – or by using the arrows next to each value.

If the shift repeats on other days of the week, or monthly or yearly, use the controls under the “Repeats:” heading to set up the appropriate repeating pattern. The other instances of this shift will automatically be created for you, both in this schedule and in your future schedules.

Next, specify how many volunteers from each job are required for this shift. Select a job from the list by clicking on it and then type the number of required volunteers for that job. (You can also use the arrows that appear below the job list to adjust this number.)

Once you have configured this shift for the correct times, days, and required jobs, click OK. Then repeat this process for all your other shifts. When you have finished creating all your shifts, choose “Save” from the File menu at the top of the schedule window. A dialog will open asking you to enter a name for the schedule. Be sure the box is checked to “Make this schedule live now” and select the option to “Just use the default layout and options for now,” and then click OK.



### Step 3: Entering your volunteers

Now that the schedule is saved, it’s time to get your volunteers into the database. There are three ways to do so:

1. **Import existing volunteers’ contact information** from a .csv (Excel) or .txt file. For help importing volunteers, please refer to [this article](#) in VSP’s Complete Documentation.
2. **Email your organization’s enrollment form to a list of contacts.** As people enroll, they are added as volunteers to the database. See below for more information.
3. **Enter your volunteers’ information manually one volunteer at a time.** See the section below for information on manually entering volunteers.

#### Using the Enrollment Form

VSP’s enrollment form is an online form that potential volunteers fill out to be added to your organization’s VSP database. To see the enrollment form, click on the Web Terminal pane on the left hand side of VSP's main screen. At the top of the pane, click “Web Terminal Settings” and then click the Enrollments pane on the left. The Enrollment URL at the top is the direct link to your form, which you can send to volunteers.

Click on your Enrollment URL to see how volunteers will go through the enrollment process. Your web browser will open to the default enrollment form. When volunteers fill out this form and click submit, you will see a record of their enrollment appear in the Web Forms pane of VSP. By default, enrollment forms need to be manually processed by you or another VSP administrator (you can alternatively turn on automatic processing if you prefer not to have to approve each enrollment). When an enrollment form is processed (either manually or automatically), the following will occur:

- The volunteer appears as an active volunteer in the Volunteers pane.
- The volunteer will receive an email confirming their enrollment form was processed, and providing information on how to log in to the Web Terminal to sign up for additional shifts, update their profile, and more.
- If you allow volunteers to sign up for specific shifts during enrollment, the volunteer is placed in the shifts they selected, which you can verify by opening the schedule from the Schedules pane on the left hand side of VSP's main screen.

Now that you've seen how the enrollment process works, let's take a look at how it can be customized for your organization's specific needs. You can control which information to collect by going to the Web Terminal pane on the left hand side of VSP's main screen, and clicking the “Web Terminal Settings” button at the top of the Home tab (note that the Web Terminal Settings dialog is not accessible in the 15 day free trial of VSP). Click the Enrollments pane on the left, and a number of subheadings will appear below it. Each heading controls one section of the enrollment form. Using these controls, you can:

- Customize the information requested during enrollment.
- Enter descriptions for your jobs to be displayed on the enrollment form.
- Customize the text of the enrollment confirmation email.

## Manually entering volunteers

Click on the Volunteers pane on Volunteer Scheduler Pro’s main screen and then click the “New Volunteer...” button for each volunteer you are scheduling. Enter the first and last name of the new volunteer, and add his or her email and contact information. You can create and enter values for custom fields by clicking the “Edit custom fields...” button. Select the jobs the volunteer is qualified in using the “Job qualifications” list in the top right corner of the dialog.

The rest of the settings on the right hand side of the dialog are used to track volunteer availability and preferences. **You will not need to use these sections** if you are primarily having volunteers sign up for shifts online. You will only need to use the “Shift

preferences” and “Preferred serving frequency” sections if you are using the availability based rotation model. (See Appendix A for a discussion of the three common volunteer scheduling models.)

When you are finished editing this volunteer’s profile click the OK button. (For a detailed explanation of all the options available in the Edit Volunteer dialog, refer to VSP's Complete Documentation.)

## **Step 4: Scheduling volunteers**

Once you have created your schedule and imported/entered volunteers, you are ready to start scheduling volunteers. There are four methods that can be used to schedule volunteers.

1. Volunteers sign up for shifts online
2. You manually add volunteers to particular shifts
3. You set up repeating scheduling patterns for volunteers (Fri, 9:00 AM every other week)
4. You use the auto-scheduler to fill in shifts automatically based on volunteers' availability

With VSP, you may use any combination of these methods. Which methods you use most will depend on the scheduling model used by your organization. (See Appendix A for a discussion of the three common volunteer scheduling models.) We'll walk through how to use each of these methods in order.

### **Volunteers sign up for shifts online**

To see how volunteers will sign up for shifts online, click on the Web Terminal pane on the left hand side of VSP's main screen, and click the “Login as...” button. Choose a volunteer to login to the Web Terminal as if you were that person. Once you are logged in, click on the “Full Schedules” tab at the top of the page, and then click on an unfilled position to sign up for a shift (note that the volunteer you are logged in as must be qualified in the job to be able to sign up for the position). Once you submit the request, go back into VSP (minimize or close the web browser window), and click on the Web Forms pane on the left hand side of VSP's main screen. You'll see an “Assignment form” in the list that represents the assignment request you submitted online. To actually make the assignment in the schedule, select the form and click the Process Form button. (You can also set up these forms to be automatically processed, so the assignments are made in real time as soon as the forms are submitted.)

When you are ready to introduce VSP to your volunteers, you will email them a link to the Web Terminal and their username and password so that they can log in and begin signing up for shifts.

### **Manually schedule volunteers**

Open the saved schedule you created by clicking on the Schedules pane on the left hand side of VSP's main screen, selecting the schedule, and then clicking the “Open Schedule” button. Then click on a day in the calendar view that contains some shifts. Click on one of the empty positions in the shift and you'll see that the volunteer list on the right side of the window shows the volunteers that are eligible and available to fill the selected position. VSP displays volunteers with scheduling conflicts in red and orange. For example, if a volunteer is already scheduled at that shift, his name will appear red to warn you not to schedule him in the selected position. To fill the position with one of the volunteers in the list, double click or drag and drop the volunteer to assign them.

## **Set up repeating assignments**

After the volunteer has been placed in the empty position, you'll see a “Repeats...” bubble appear that points to the assignment. By clicking on that bubble, you can set up that assignment to repeat on a fixed pattern (e.g. every weekday, every 3<sup>rd</sup> week, etc.) You'll use this “Repeats...” bubble extensively if you are using the fixed rotation scheduling model.

## **Allow the auto-scheduler to fill positions**

If you are using the availability based rotation model, you'll use the auto-scheduler to automatically fill positions based on your volunteers' availability and preferences by clicking the “Auto-schedule” button in the upper right corner of the schedule window. The auto-scheduler will ensure that volunteers are not scheduled during any of their “Unavailable times”, that their shift preferences and preferred serving frequency settings are honored and that each volunteer appears on the schedule regularly.

## **Step 5: Customizing VSP for your organization**

Now that you've seen how to fill the shifts in your schedule, let's see how you can customize VSP for your organization.

### **Custom Fields**

If you need to collect and track volunteer information that is not reflected in the predetermined fields within VSP, you can create custom fields (note: custom fields are only available in VSP's Standard Edition). Examples of common custom fields include t-shirt size, birthday, certifications, and more. You can add your custom fields to the enrollment form and the My Profile form so that volunteers can update these fields themselves online.

To define custom fields in VSP, go to the Volunteers pane and click “New Volunteer...” In the new window, click the “Edit Custom Fields...” button that you will see in the lower left portion of window. A new window will open and in the upper right side, click the “Create new field” button. You have different options for custom fields: text, number, date, checkbox, and list of options. Once you create the field it will appear in the main part of the screen. Click OK once you have added all the custom fields you wish to track.

### **Web Terminal Settings**

Click on the Web Terminal pane on the left hand side of VSP's main screen and then click the “Web Terminal Settings” button at the top of the Home tab. In the dialog that appears, a variety of customization options are available (note that the options in the Web Terminal Settings dialog are not accessible during VSP's 15 day free trial). Among many other options, you can:

- Customize the text of automatic email reminders
- Turn on automatic text message (SMS) reminders
- Turn on automatic processing for web forms, so that requests that volunteers make through the Web Terminal are processed immediately, instead of being held for manual processing.

- Brand the Web Terminal with your organization's logo.
- Customize the profile information that volunteers can update in the “My Profile” tab. For instance, hide the shift preferences and unavailable times areas, or include custom fields on the My Profile tab.

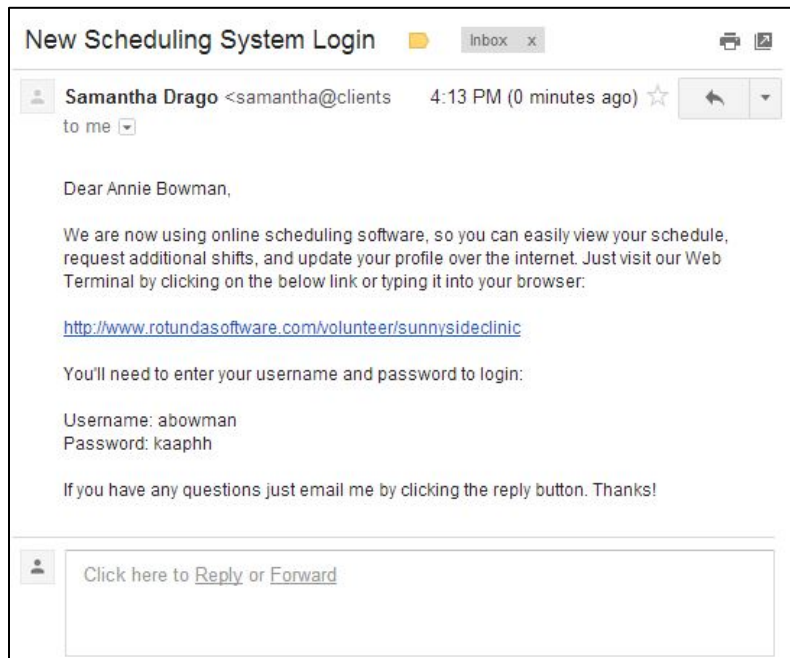
Take a look through these options to get a feel for the customization options that are available, and choose the settings that best fit the needs of your organization. By using the “Login as...” button at the bottom of the Web Terminal pane, you can see how your changes are reflected in the Web Terminal. (If your changes didn't appear to update, you may need to click the “Commit Changes” button in the lower right hand corner of the Web Terminal pane of VSP.)

### Adjust labels for “Jobs,” “Shifts,” “Volunteers”

With VSP, you can change the labels used for Jobs, Shifts, and Volunteers to terms that are more appropriate for your organization and its members. To edit the terms used, go to the Edit menu at the very top of VSP and choose “Change label used for” and select the label you wish to change.

## Step 6: Giving your volunteers online access to the Web Terminal

When you are ready to give your volunteers access to the Web Terminal, click on the EMailer pane on the left hand side of VSP's main screen (note that you cannot send emails during the 15 day free trial of VSP). You'll see an email that is ready to be sent to your volunteers that will provide them with the link to your Web Terminal home page and their personal usernames and passwords that are automatically generated for them by VSP. Tokens enclosed in {{ curly brackets }} will be replaced with the appropriate information for each volunteer when the email is sent. (You can click on the “Preview” button at the top of the pane to see how the email will look when sent to each volunteer. If you are



using the self-sign-up model, you'll want to remove the {{ ScheduledShifts }} token from this template since the schedule will not yet have been finalized.) Feel free to customize the email to best suit your organization's needs – you can add and remove text and tokens as needed by typing into the text box.

When you are ready to send the email, click the Send button. Your volunteers will then be able to login and sign up for unfilled positions, request subs, and update their profile information through the Web Terminal. If you did not turn on automatic processing of web forms, you'll want to review and process changes regularly by clicking the Web

Forms pane on the left hand side of VSP's main screen.

We also recommend that you post a link to your Web Terminal's home page on your organization's web site, so that your volunteers can access their schedules by visiting your organization's site. To do this, go to the Web Terminal pane on VSP's main screen and then click the "Copy URL" button in the top right corner of the pane. You can send an email to your organization's webmaster and choose "Paste" from the "Edit" menu to paste the link into the email with a request to post it on your site.

## **Conclusion**

You've just seen how easy it is to create schedules, publish opportunities and fill shifts using Volunteer Scheduler Pro. The program also contains hundreds of other features that were not covered in depth in this Quick Start Guide. Highlights include VSP's E-mailer, hours scheduled reporting, attendance tracking, text message blasts, and more. For an inventory and explanation all of VSP's features please refer to the complete documentation. Please do not hesitate to contact us as questions arise. We are happy to help you get started with VSP and make sure that all your organization's specific scheduling needs are met.

## **Appendix A: The three common volunteer scheduling models**

### **1. The self-sign-up model**

In this model each volunteer picks their own shifts on a first-come, first-serve basis. This is the simplest and most flexible scheduling model from the volunteer's perspective. The self-sign-up model works best for cases where filling all shifts is not a concern, shifts do not need to be distributed evenly, and you do not want to ask for a minimum level of commitment from volunteers.

### **2. The fixed rotation model**

In this model each volunteer has a fixed schedule that repeats daily, weekly, or monthly. Each volunteer is expected to work at their regularly scheduled times. In some organizations, before each schedule is created volunteers may submit any dates on which they will not be available and are left off the schedule on those dates. Other volunteers then can sign up for the empty positions or you can manually schedule the open positions caused by such gaps in the rotations.

This scheduling model guarantees that all volunteers participate regularly, so it can lead to greater total volunteer hours compared to the self-sign-up model. As the number of volunteers and shifts grow, it becomes more difficult to manage the fixed rotations. The fixed rotation model is best used if you want to ask for a minimum level of commitment from volunteers, the number of volunteers and shifts is relatively small, and volunteers' schedules are consistent.

### **3. The availability based rotation model**

In this model each volunteer is scheduled regularly, but their schedule changes from week to week based on availability. As with the fixed rotation model, schedules are usually produced for a month or two at a time, and before each schedule is created volunteers submit any time periods for which they will not be available. They may also update a list of their preferred shifts, and the approximate frequency with which they would like to serve. A schedule is subsequently assembled that honors volunteers' requests while filling all shifts.

Like the fixed rotation mode, this model guarantees that all volunteers participate regularly, so it can lead to greater total volunteer hours when compared with the self-sign-up model. It also ensures that all shifts are filled (given sufficient volunteers), in contrast to the other two common models. The availability based rotation model is best used if you want to ask for a minimum level of commitment from volunteers and volunteers' availability is not consistent.