

# | Quick Start Guide for | Adoration Schedules



**Volunteer Scheduler Pro**

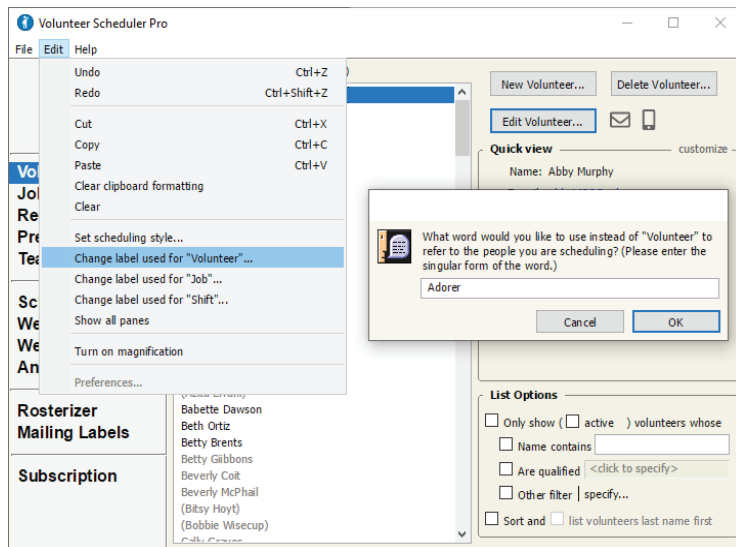
Effective Scheduling Software

# 1

## Define your database

When you launch VSP, it's helpful to re-label the headings on the left-hand side to more accurately reflect Adoration schedules.

1. Click the "Edit" menu at the top of the VSP window.
2. Select "Change label used for Volunteer."
3. Change the word "Volunteer" to "Adorer" (enter the singular form of the word and VSP will pluralize as needed).

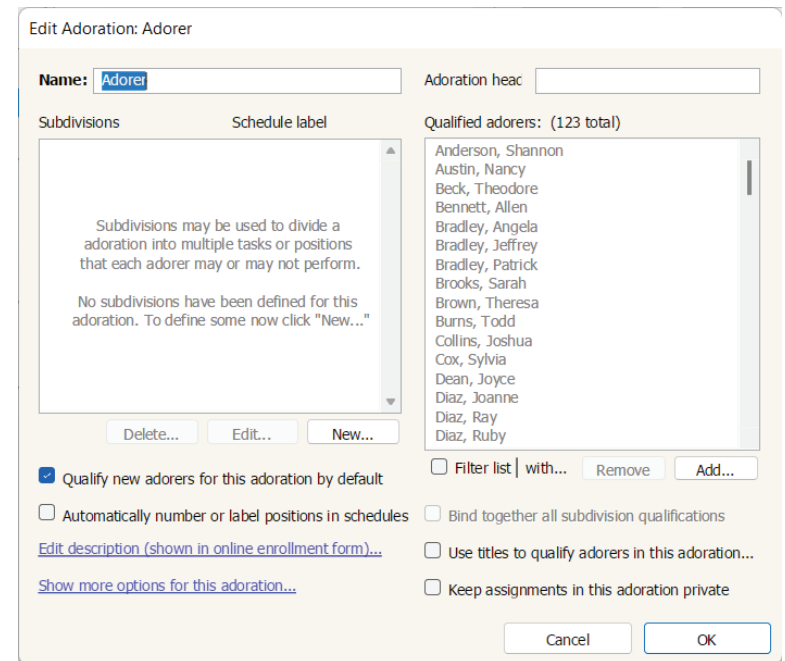


# 2

## Enter your jobs

Start by setting up your "Adorer" job. Later you will be able to specify how many Adorers should be scheduled at each time.

1. Click on the Jobs pane.
2. Click the "+" button and select "New Job."
3. Name your job.
4. To ensure everyone is added as an Adorer, select "Qualify new adorers for job by default."
5. Click "OK."



# 3

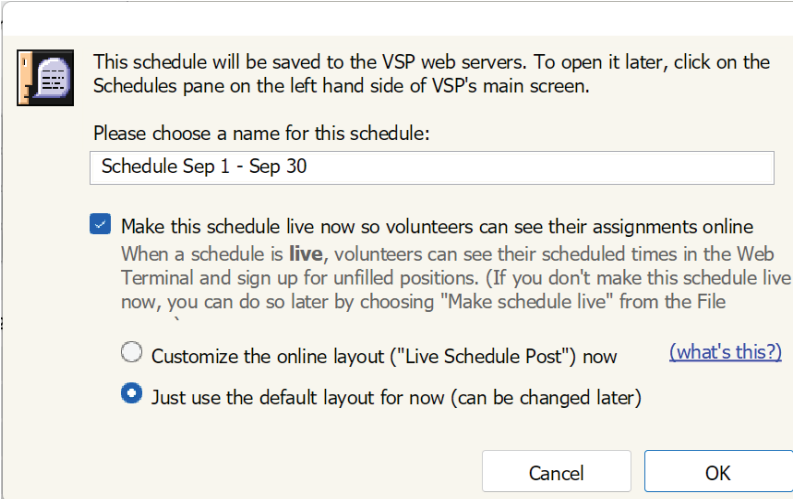
## Creating a schedule

After you have entered all your jobs, create a schedule. Note that all the shifts and jobs that will occur within this time period will be included on this “master schedule.”

1. Click on the Schedules pane.
2. Enter the start and end dates for a schedule, and then click the “Create...” button.
3. Click on a day in the calendar on which one of your shifts takes place, and then click the “New Shift...” button at the top of the window.
4. In the dialog that appears, set the start and end times for the shift. (Usually Adoration shifts are one hour in length, every hour.)
5. 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.
6. Specify how many Adorers are required for this shift.
7. Click “OK.”
8. Repeat this process to set up 24 separate, one-hour shifts for Adoration.

When you have finished creating all your shifts:

1. Choose “Save” from the File menu at the top of the schedule window.
2. 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 for now.”
3. Click “OK.”



This schedule will be saved to the VSP web servers. To open it later, click on the Schedules pane on the left hand side of VSP's main screen.

Please choose a name for this schedule:

Schedule Sep 1 - Sep 30

☒ 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

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

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

Cancel OK

# 4

## Enter your Adorers

There are several ways to go about entering your Adorers: manually, via import, or via email.

### Manually enter Adorers to customize their complete profile.

1. Click the “+” button on the right side of the Adorers pane.
2. Add the Adorer name, email, and any other information about that Adorer that you want to track.

### Import Adorer contact information

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

1. Go to File - Import Adorers.
2. From the available fields, select the fields to import in the order they appear on your spreadsheet.
3. Choose whether to qualify everyone from the spreadsheet as Adorer.
4. Click the “Import” and choose your spreadsheet.

# 4

cont'd

## Email an online enrollment form to a list of contacts

As people enroll, they are added as Adorers to the database. [Watch this video](#) for a walkthrough of the full enrollment form setup process.

To see the enrollment form:

1. Click on the Web Terminal pane on the left hand side of VSP's main screen.
2. At the top of the pane, click "Web Terminal Settings" and then click the Enrollments pane on the left.
3. The Enrollment URL at the top is the direct link to your form, which you can click this to view or to send to Adorers.

## TIP

### Recommended settings

The remaining settings on the right-hand side of the dialog are used to track Adorer availability and preferences. You will not necessarily need to use these sections if you are primarily having Adorers assigned to repeating shifts. However, it may be beneficial to enter Shift Preferences and Unavailable dates/times to help determine what type of sub requests people will receive.

For example, if an Adorer has 8AM – 9AM and 9 AM – 10 AM as shift preferences and selects "Schedule only at these shifts," then by default they will only receive substitute requests for those times.

# 5

## Scheduling volunteers

VSP accommodates many forms of scheduling, and you can mix and match to find the right method for your organization. The most common method of scheduling Adorers is to schedule them with repeating “preassignments” that occur at regular intervals.

### **Preassignments:** Set Adorers to repeat on a pattern

[Click here](#) for a video on how to set up rotating assignments.

1. Open the saved schedule you created in step 2.
2. Click on one of the empty positions in a shift and you’ll see that the Adorer list on the right side of the window shows the Adorers who are eligible and available to fill the selected position.
3. To fill the position with one of the Adorers in the list, double-click or drag-and-drop the Adorer to assign them.
4. After manually placing an Adorer on the schedule, click the “Repeats” button.
5. Set the repeating pattern for the chosen Adorer.
6. Click “OK.” The Adorer will now be placed in the rotating pattern on this and all future schedules.

### **Self sign-up:** Allow Adorers to sign up for shifts online

1. If you did not already do so, choose “Make schedule live” from the File menu of the open schedule.
2. Select “Customize the online layout and other options for this live schedule now” and click “OK.”
3. In the Layout Settings pane of the “Online layout and options” dialog, ensure that the “Include unfilled positions in list of volunteers” option is selected so volunteers can see and sign up for the unfilled positions and click “Save” once you have selected any other settings you prefer.
4. You can optionally set up the web forms to be [automatically processed](#) so that the assignments are made in real time as soon as the forms are submitted.
5. Adorers will now be able to see and sign up for unfilled positions in the Web Terminal.

## Customizing VSP for your organization

**Custom fields**, available in the Standard edition, can be used to collect and track Adorer information that is not reflected in the predetermined fields within VSP. Examples of common custom fields include t-shirt size, birthday, certifications, and more. Custom fields can be added to the enrollment form and the My Profile form so that Adorers can update these fields themselves online.

[Click here](#) for a video on how to set up custom fields.

1. Go to the Adorers pane and click “New Adorer...”
2. In the new window, click the “Edit Custom Fields...” button.
3. Click the “Create New Field” button.
4. 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.

5. Click “OK” once you have added all the custom fields you wish to track.

**Web Terminal settings** allow you to further customize how Adorers interact with VSP through the Web Terminal. (NOTE: Web Terminal settings are not available during the 15-day free trial.)

1. Click on the Web Terminal pane on the left-hand side of VSP’s main screen.
2. Click the “Web Terminal Settings” button at the top of the Home tab.

In the dialog that appears, you will find a variety of customization options. Among many other options, you can:

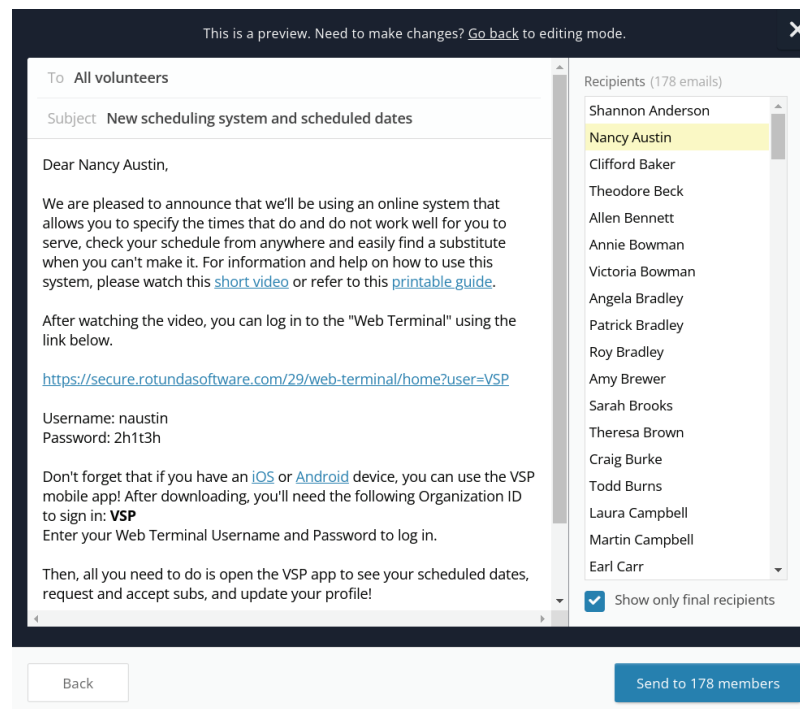
- Customize the text of automatic email reminders
- Turn on automatic text message (SMS) reminders
- Turn on automatic processing for web forms, so that requests that volunteers make through the Web Terminal are processed immediately rather than held for manual processing at a later time.
- Brand the Web Terminal with your organization’s logo
- Customize the profile information that Adorers can update in the My Profile tab. For instance, you can hide the shift preferences and unavailable times areas, or you

may include custom fields on the My Profile tab.

## Giving Adorers online access to the Web Terminal

When you are ready, send your Adorers an email through the Announcements pane to let them know how to log in to the Web Terminal. (NOTE: You can set up but not send Announcements during the 15-day free trial.)

1. Click on the Announcements pane on the left-hand side of VSP's main screen.
2. Click the "+" button in the upper right and select "Templates" and then "Preconfigured."
3. Select one of the "Introductory email" templates to send your Adorers that will provide them with the link to your Web Terminal homepage 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. 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.
4. Click the "Preview" button, then click on a Adorer's name to see how the email will look when sent to each Adorer.



We also recommend that you post a link to your Web Terminal's home page on your organization's website so that your Adorers can access their schedules by visiting your organization's site.

1. 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.
2. 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

Congratulations! You have completed the setup work of entering your jobs, creating a schedule, and adding volunteers. You should now have a clearer idea of how VSP can work for your organization.

For more help getting started with VSP, visit our [Help Center](#). There, you will find:

- [Video tutorials](#) on specific features in the program, including those not covered in this guide, such as how to print the schedule, customize the online layouts, and send text messages
- [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 888-877-3640.

We also have guides available [Salvation Army Kettles](#), [Adoration](#), or [events](#).

