

# Scheduler

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## Overview

Scheduler is a program written to help automate the process of scheduling volunteers for church activities. It is written to be accessible via browser so that it may be easily used from an office, from home or even from cell phones. The code is written to allow you to:

- Define a list of volunteer positions that need to be filled and when the volunteer should arrive.
- Define a list of volunteers. Volunteers may specify:
  - Days when they are unavailable.
  - Days when they would prefer to serve (say for instance, their daughter would be visiting and they would like to provide communion together).
  - Positions that they would like to volunteer for.
  - How they wish to be contacted (email, text, or both).
- Generate schedules for a given date range.
- View schedules for a given date range.
- Send requests to volunteers (via email or text message) to ask them to update their information before a new schedule is generated.
- Send a personalized list of service dates to volunteers (via email or text).
- Send reminders (via email or text) to volunteers who are scheduled to serve within the next week.

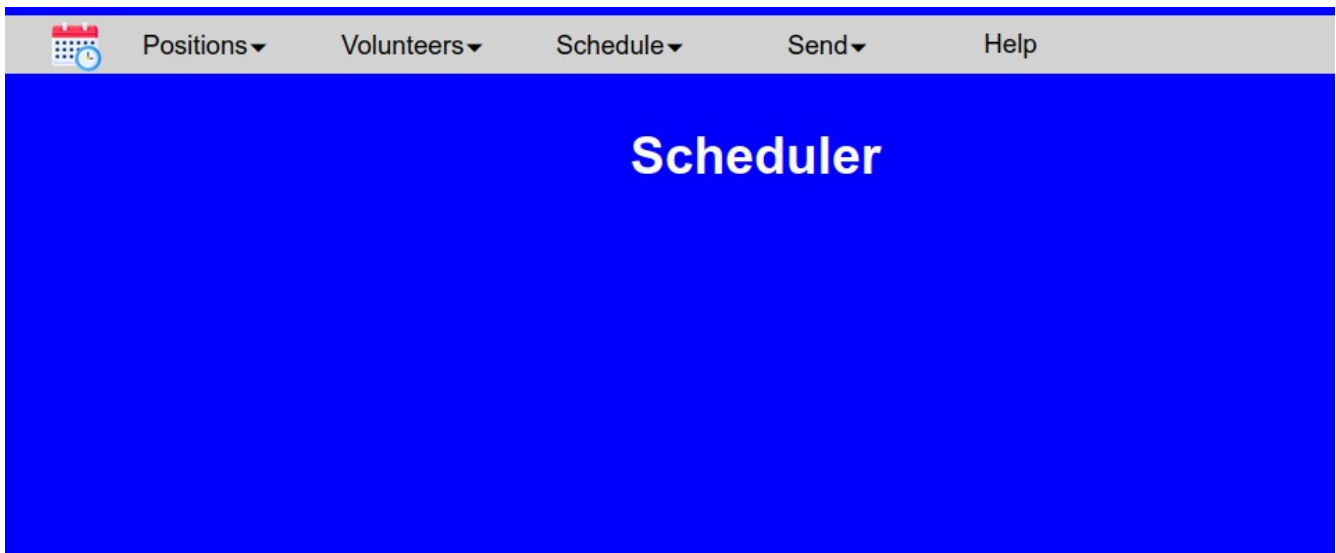
# Quickstart

Here is a quick summary of the steps in getting started, with more detail following:

1. From the main menu, select **Positions** and define an entry for each position that is needed. Note that for each position you can indicate how many people are needed to fill that role on a given date.
2. From the main menu, select **Volunteers** and from that page, make an entry for each person who wishes to volunteer. For each person you can enter their name, email, phone number, how they prefer to be contacted, position(s) that they wish to volunteer for (selected from the previously defined list) and optionally any dates for which they are not available, or dates when they would prefer to be chosen to volunteer.
3. If you wish to allow individuals to update their information before generating a schedule, select **Send** from the menu bar, and select **Send Info Update Requests** from the drop-down menu. This will send email and or text messages to each volunteer asking them to update their information and providing them a browser link that they can use to make the updates.
4. When ready to generate a schedule, select **Schedule** from the menu bar and select the **Generate Schedule** item from the drop-down menu. This will direct you to a page where you may specify the dates to generate the schedule for. A schedule will be generated and you will be directed to the “View Schedule” page. If all positions were filled, the program will send personal schedules to each person in the schedule, with the dates when they are requested to serve and the positions that they will fill.
5. If the schedule has some positions which were not filled, you will need to fill them manually and once the schedule is complete, you can select the **Send** and **Send Schedules** items on the menu bar to send schedules to each volunteer.
6. To send reminders to volunteers each week, simply click **Send** and then **Send Weekly Reminders** from the drop-down menu. Each person who is scheduled to volunteer that week will receive a reminder via text or email.

## And now in a little more detail...

To begin using Scheduler for the first time, start by connecting to the web page, which should look something like this:

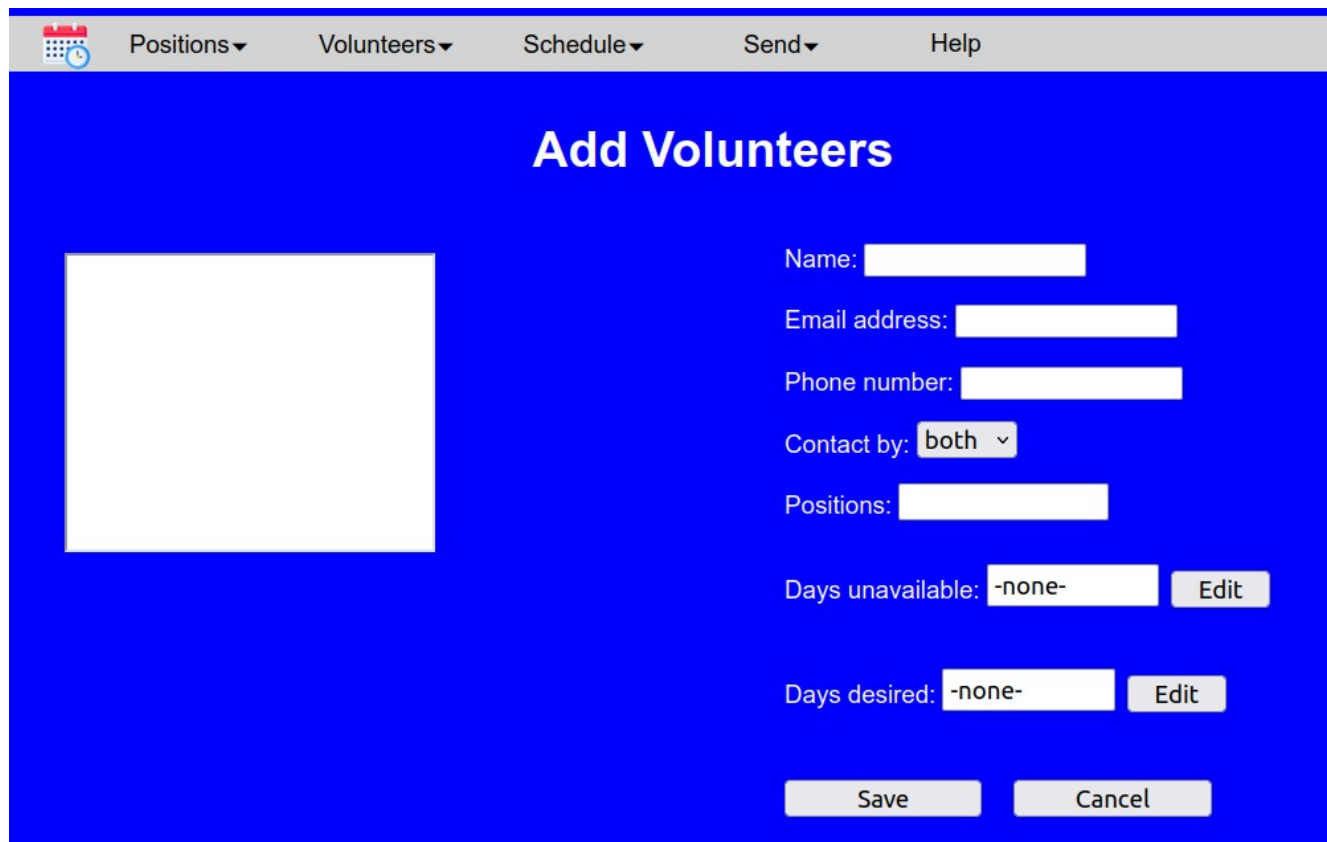


In the top left corner is the Scheduler icon. Clicking on this icon will return you to the home page. As your first time using the system, you should begin by clicking on the **Positions** menu item, and select the **Add Positions** entry. This will direct you to a screen that looks like this:

A screenshot of a web application interface for adding volunteer positions. The top navigation bar is identical to the previous screenshot. The main area has a solid blue background with the title "Add Volunteer Positions" centered in a large, white, sans-serif font. On the left side, there is a large, empty white rectangular box. On the right side, there are four form fields: "Position:" followed by a text input field; "Day Needed:" followed by a dropdown menu showing "Sunday"; "Time when service needed:" followed by a time input field showing "10 : 45 AM"; and "Number of volunteers needed:" followed by a spinner input field showing "1". Below these fields is a "Save Position" button.

The box on the left will show the names of volunteer positions, but initially, it is empty. From this screen you will define the positions that need to be scheduled. Continue adding and saving entries into the table until all of the positions that need to be scheduled have been defined.

Next you will want to enter all of the volunteers. To do so, click on **Volunteers** in the menu bar at the top of the screen and select the **Add Volunteers** entry from the drop-down menu. It will direct you to a screen that looks like this:

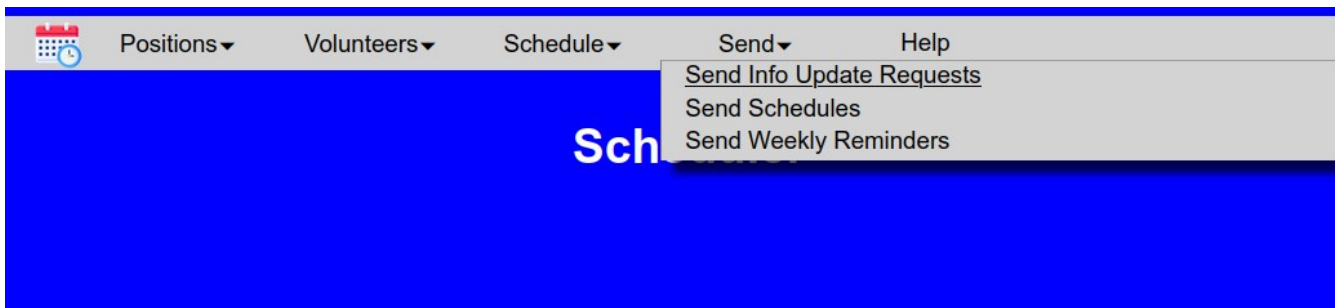


The screenshot shows a web application interface with a blue header bar containing a calendar icon and menu items: Positions, Volunteers, Schedule, Send, and Help. The main content area has a blue background and is titled "Add Volunteers". On the left is a large white rectangular box. On the right is a form with the following fields: "Name:" with a text input; "Email address:" with a text input; "Phone number:" with a text input; "Contact by:" with a dropdown menu showing "both"; "Positions:" with a text input; "Days unavailable:" with a dropdown menu showing "-none-" and an "Edit" button; "Days desired:" with a dropdown menu showing "-none-" and an "Edit" button. At the bottom are "Save" and "Cancel" buttons.

From here you can enter the information for each volunteer. If possible provide both email address and the phone number to receive texts and select whether the Scheduler program should contact this person by text, by email, or both. The “Positions” entry will include the position titles that you provided while building the positions table. Make sure that you select at least one of the positions for the person to volunteer for. Multiple selections from the list are possible by holding down the control key while you make a selection.

When you have entered the information for a volunteer, click the save button. The program will save the information and clear the fields so that you may enter another volunteer. Continue adding volunteers until all volunteer names have been entered.

At this point, you may wish to give your volunteers the opportunity to review the information and possibly update it. You may send out requests to all of the volunteers in your list asking them to to update their information by clicking on the **Send** item on the menu bar and selecting **Send Info Update Requests** from the drop-down menu.



Each person from the volunteer list will receive an email or text asking if they need to update their information, along with a link which will let them update their information.

Once all of the volunteer information has been verified, you are ready to generate a schedule. To do so, select **Schedule** from the menu bar and select **Generate Schedule** from the drop-down menu. You will be directed to a screen like this, that asks you to enter the first and last dates to include in the new schedule.

A screenshot of the 'Generate a Schedule' screen. The page has a blue background with a white header bar containing the same navigation menu as the previous screenshot. The main heading is 'Generate a Schedule' in large white text. Below the heading, there is a paragraph of instructions in white text. Further down, there are two date input fields, each with a calendar icon, and a 'Build Schedule' button. The text is as follows:  
**Generate a Schedule**  
  
This will generate a schedule for the dates listed below, using the list of positions to fill and volunteers which you have previously entered.  
  
If you have not already entered the positions to be filled and the available volunteers, please do so before pressing the "Build Schedule" button.  
  
Start Date of Schedule:    
End Date of Schedule:    
  

From this screen, enter the starting and ending dates. You may enter numbers into the mm / dd / yyyy fields or click the calendar icon to be provided with a calendar for selecting the dates. Note that the dates are inclusive, so if, for example, you select 01/05/2025 and 01/26/2025 as the starting and ending dates, both of those dates will be scheduled (if those are weekdays that you have positions to fill). When you have finished, press the **Build Schedule** button.

Scheduler will then calculate the dates when positions need to be filled and try to find a volunteer to serve in each position for each of those dates. When it has finished, it will show you the schedule that it generated. The screen will look something like this:

[Positions](#)[Volunteers▼](#)[Schedule▼](#)[Send▼](#)[Help](#)

## View Schedule

Here is the current schedule for **2025-01-05** through **2025-01-26**

Scheduling complete, volunteers are being notified.

### 2025-01-05

#### communion

FriendlyFred

#### greeter

NewGuy

#### scripture reader

Garry Taylor

#### techBooth

Tech Savy

### 2025-01-12

#### communion

Smiley

#### greeter

FriendlyFred

#### scripture reader

EasyReader

#### techBooth

Tech Savy

### 2025-01-19

If Scheduler was able to fill all of the slots, it will display the message saying “Scheduling complete, volunteers are being notified,” and all of the people in the schedule will receive a message telling them the dates that they are scheduled to serve and the positions that they will be filling.

If the Scheduler was not able to fill all of the slots, the screen will look like this:

**View Schedule**

Here is the current schedule for **2025-01-05** through **2025-01-26**

Please note that not all positions may have been filled.

2025-01-05

- communion**  
Smiley
- greeter**  
NewGuy
- nursery**  
—unfilled—
- scripture reader**  
EasyReader
- techBooth**  
Bubba

2025-01-12

- communion**  
Some One
- greeter**  
NewGuy
- nursery**  
—unfilled—
- scripture reader**  
Garry Taylor

with the message indicating that all slots were not filled. Note that if this occurs, Scheduler will not automatically send out schedule notices to the volunteers, since some changes may first need to be made to the schedule. If this occurs, you may need to manually edit the schedule. To do so, click on the name (or “—unfilled—”) and an edit box will pop up showing you the names of all volunteers who offered to work in this position.

**Edit Volunteer Slot**

Choose someone for the **communion** position on 2025-01-05:

Volunteer: Bubba

Save Cancel

2025-01-05

**communion**  
Smiley

**greeter**  
NewGuy

Pick one of the names from the drop-down list of volunteers and press the **Save** button to save the change to the schedule.

When you have completed the changes to the schedule, you may then want to send the personal schedules to each of the volunteers. To do so, select **Send** from the menu bar and click the **Send Schedules** entry.

Positions Volunteers Schedule **Send** Help

- Send Info Update Requests
- Send Schedules**
- Send Weekly Reminders

Here is the current schedule for 2025-01-05 through 2025-01-26

You will be redirected to this screen, where you can enter the start and end dates of the schedule that you wish to send out.

**Send Schedule to Volunteers**

This will send copies of the schedule for the dates that you enter below to the appropriate volunteers.

Start Date of Schedule: mm / dd / yyyy

End Date of Schedule: mm / dd / yyyy

Send Schedule

Select the starting and ending dates and then press the **Send Schedule** button to send out the personal schedules to each volunteer who was scheduled.



Each week, you may wish to send out reminders to the volunteers who are scheduled to work that week. To do so, click the **Send** entry on menu bar and then select **Send Weekly Reminders**.



This will cause Scheduler to send out a reminder to each person scheduled to work that week, reminding them of the position that they will be filling and when they are needed. Note that Scheduler keeps track of who it has sent reminders to, so if you accidentally do this more than once in a week, it will not send out duplicate reminders.

## Tasks

### Positions

Positions are the roles that need to be filled by volunteers. Scheduler allows you to define a position by name, specifying the time and day of the week that the position needs to be filled. It also allows you to specify the number of volunteers needed to fill the role. So, for instance, you may need only one person to fill the role of “Scripture Reader”, but you may need four volunteers to assist with communion.

## Adding Positions


To add positions to the list, select on the **Positions** menu item, and select the **Add Positions** entry. This will direct you to a screen that looks like this:

The screenshot shows a web application interface with a grey navigation bar at the top containing icons and menu items: 'Positions', 'Volunteers', 'Schedule', 'Send', and 'Help'. The main content area has a blue background with the title 'Add Volunteer Positions' in white. On the left, there is a large white rectangular box. On the right, there are four input fields: 'Position:' (a text box), 'Day Needed:' (a dropdown menu showing 'Sunday'), 'Time when service needed:' (a time picker showing '10 : 45 AM'), and 'Number of volunteers needed:' (a spinner box showing '1'). Below these fields is a grey button labeled 'Save Position'.

The box on the left will contain the names of any positions which were previously defined. To add a new position, simply fill out the fields on the right. In the “Position:” field, enter the name that you wish to use for this position, for example “Greeter”. When all fields are entered, press the **Save Position** button. A popup box will confirm that you wish to add the value. Once the value is added, the position will be added to the list on the right and the fields will be reset so that you may enter a new position value, if you wish.

## Editing Positions

You can edit the list of positions to change the values of existing entries, or to remove entries from the list. To edit positions, select **Positions** from the menu bar and then select the **Edit Positions** entry. You will be directed to a screen similar to this:

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Edit Volunteer Positions

Communion Assistant

Greeter

Scripture Readerr

Position:

Communion Assistant

Day Needed:

Sunday ▼

Time when service needed:

10 : 45 AM


Number of volunteers needed:

4

Save Changes

Delete Position

As you can see in this example, there was a typo in the name of the “Scripture Reader” position. To correct it, click on the entry in the box on the left.

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Edit Volunteer Positions

Communion Assistant

Greeter

Scripture Readerr

Position:

Scripture Readerr

Day Needed:

Sunday ▼

Time when service needed:

10 : 45 AM


Number of volunteers needed:

1

Save Changes

Delete Position

As you can see, the fields on the right are updated to show the values for this position. Correct the title in the “Position:” field, and then press the **Save Changes** button. You will be prompted to confirm the save, and if you press the “Save Changes” button, the list will be updated to reflect the change.

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Edit Volunteer Positions

Communion Assistant

Greeter

Scripture Reader

Position: Communion Assistant

Day Needed: Sunday ▼

Time when service needed: 10 : 45 AM


Number of volunteers needed: 4 ▼

Save Changes

Delete Position

## Deleting Positions

If you need to remove a position from the schedule, select **Positions** from the menu bar and then select the **Edit Positions** entry. You will be directed to a screen similar to this:

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Edit Volunteer Positions

Cleanup

Communion Assistant

Greeter

Scripture Reader

Position: Cleanup

Day Needed: Sunday ▼


Time when service needed: 12 : 45 PM

Number of volunteers needed: 1 ▼

Save Changes

Delete Position

Select the entry that you wish to remove from the list on the left, and then press the **Delete Position** button. When prompted if you wish to delete this entry, select “Yes”. The position will be removed, and the list will be updated to reflect the change.




The screenshot shows a web application interface for editing volunteer positions. At the top is a navigation bar with a calendar icon and five menu items: 'Positions', 'Volunteers', 'Schedule', 'Send', and 'Help'. The main heading is 'Edit Volunteer Positions'. On the left, there is a list of positions: 'Communion Assistant' (highlighted in blue), 'Greeter', and 'Scripture Reader'. On the right, there are form fields for editing the selected position: 'Position:' with a text box containing 'Communion Assistant', 'Day Needed:' with a dropdown menu showing 'Sunday', 'Time when service needed:' with a text box showing '10 : 45 AM', and 'Number of volunteers needed:' with a spinner box showing '4'. At the bottom right are two buttons: 'Save Changes' and 'Delete Position'.

## Volunteers


Volunteers is a list of the people who have signed up to fill the various roles in the schedule. With Scheduler, each volunteer can specify days when they are unable to volunteer, and they may also specify days when they specifically wish to volunteer. For each volunteer, the email address and the cell phone number of the volunteer are tracked, along with how the volunteer wishes to be contacted (by email, text, or both). The Scheduler program will use those values to send copies of the schedule to volunteers, along with reminders for when they are scheduled to serve.

## Adding Volunteers

click on **Volunteers** in the menu bar at the top of the screen and select the **Add Volunteers** entry from the drop-down menu, It will direct you to a screen that looks like this:

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Add Volunteers



Name:

Email address:

Phone number:

Contact by: both ▼

Positions:

Days unavailable: -none- Edit

Days desired: -none- Edit

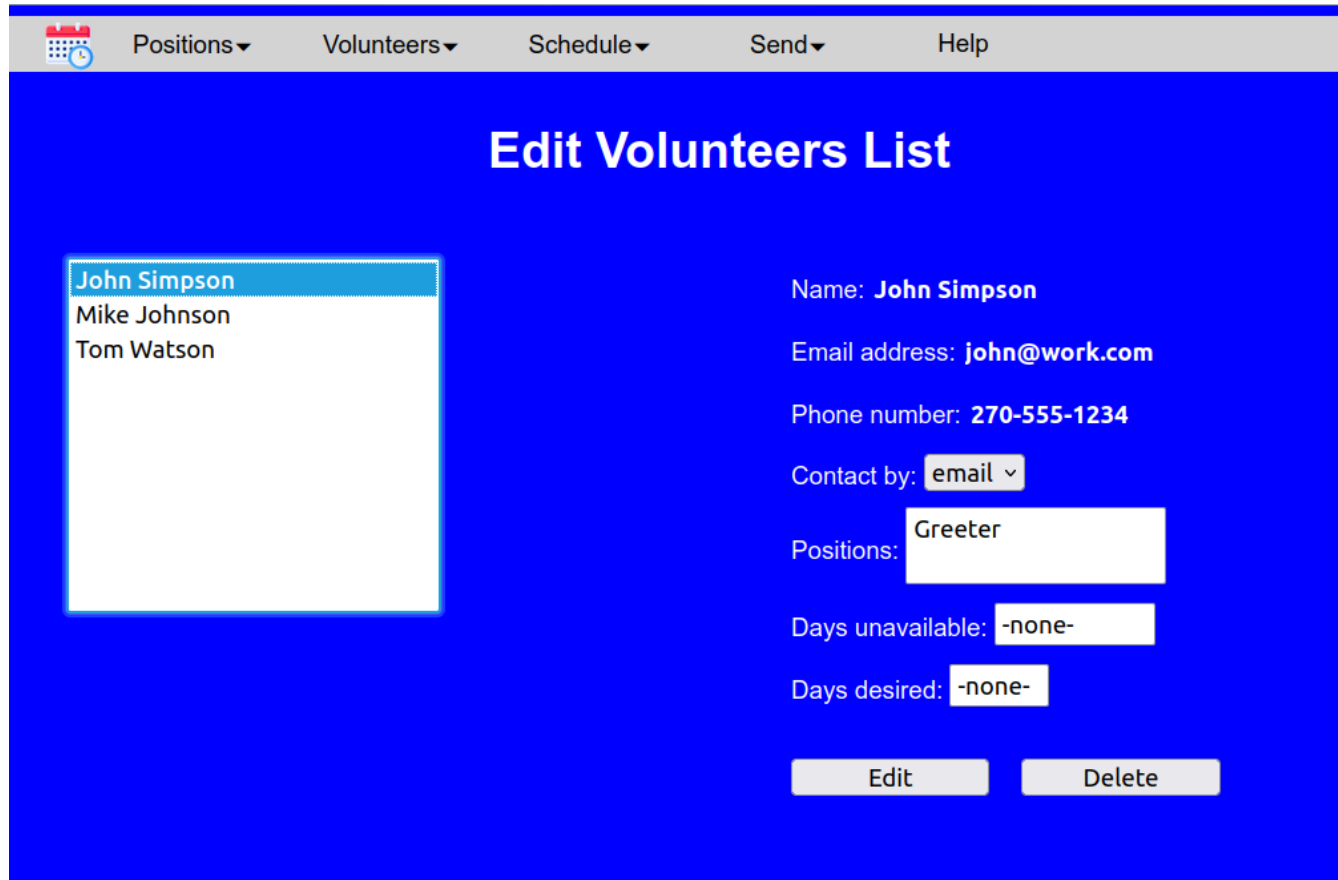
Save Cancel

From here you can enter the information for each volunteer. If possible provide both email address and the phone number to receive texts and select whether the Scheduler program should contact this person by text, by email, or both. The “Positions” entry will include the position titles that you provided while building the positions table. Make sure that you select at least one of the positions for the person to volunteer for. Multiple selections from the list are possible by holding down the control key while you make a selection.

When you have entered the information for a volunteer, click the save button. The program will save the information and clear the fields so that you may enter another volunteer. Continue adding volunteers until all volunteer names have been entered.


## Editing the Volunteer List

To edit an entry in the volunteer list, click the **Volunteers** entry in the menu bar and select the **Edit Volunteers** item. You will be directed to a screen like this:



The screenshot shows a web application interface for editing a volunteer list. At the top is a navigation bar with a calendar icon and five menu items: 'Positions', 'Volunteers', 'Schedule', 'Send', and 'Help'. The main content area has a blue background and is titled 'Edit Volunteers List' in large white text. On the left, there is a white box with a blue border containing a list of names: 'John Simpson' (highlighted in blue), 'Mike Johnson', and 'Tom Watson'. To the right of this list are several form fields for editing the selected volunteer's information. These fields include: 'Name: John Simpson', 'Email address: john@work.com', 'Phone number: 270-555-1234', 'Contact by: email' (with a dropdown arrow), 'Positions: Greeter' (in a text box), 'Days unavailable: -none-' (in a text box), and 'Days desired: -none-' (in a text box). At the bottom right of the form area are two buttons: 'Edit' and 'Delete'.

The box on the list will show a list of all volunteers entered into the system. To edit a volunteer, click on the name in the left hand box, and the fields will update to reflect that person's entries. For this example lets say Mike Johnson needs his entry changed so that he is only notified by email. First, click on the entry for Mike Johnson. You will see the screen updates to show his information:

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Edit Volunteers List

John Simpson

Mike Johnson

Tom Watson

Name: **Mike Johnson**

Email address: **mike@home.com**

Phone number: **270-555-1212**

Contact by: **both** ▼

Positions: 

Communion Assistant  
Scripture Reader

Days unavailable: **-none-**

Days desired: **-none-**

EditDelete

You can see that the “Contact by” field for Mike is currently set to “both”. To change it, press the **Edit** button. The screen will switch to one like this:



 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

## Edit Information for Mike Johnson

Name:

Email address:

Phone number:

Contact by:

Positions: 

Communion Assistant

Greeter

Scripture Reader

Days unavailable:

Days desired:

All of these fields are now editable. So to change the contact method, click the down arrow beside “both” and click on the “email” entry. When you are finished, press the  button, and when prompted, click “Ok” to save the changes. You will then be returned to the “Edit Volunteers List”

screen.

**Edit Information for Mike Johnson**

Name:

Email address:

Phone number:

Contact by:

Positions:

Days unavailable:

Days desired:

## Editing Dates

The date fields allow you to enter dates when someone is unavailable to volunteer, or someone wishes to volunteer on a specific date. Let's say from our previous example, that Mike is going to be unavailable on January 1<sup>st</sup>. To make this change, select Mike's entry as described above, and on the edit screen, click the **Edit** button next to "Days unavailable:". A popup box like this will appear:

**Dates When Mike Johnson is Unavailable:**

Add date:

Positions: Communion Assistant Greeter Scripture Reader

Days unavailable:

The box on the left will contain any days which Mike had previously listed as unavailable. If you wish to remove any of those dates, simply select it, and press the “Delete selected Dates” button. To add January 1<sup>st</sup> to the list, click in the field next to “Add date”. Depending upon your browser, you will have the option of either entering the values in the “mm / dd / yyyy” fields, or be presented with a calendar from which you can select a date.

**Dates When Mike Johnson is Unavailable:**

Add date:

Positions: Communion Assistant Greeter Scripture Reader

Days unavailable:

January 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

When the date is chosen, press “Add” and the date will be added to the list on the left.

Dates When Mike Johnson is Unavailable:

2025-01-01


Add date: mm / dd / yyyy  Add

Delete selected dates

Ok

Cancel

Continue editing the dates. When you are finished, press **Ok** and the changes will be copied to the date field on the edit screen.

 Positions▼ Volunteers▼ Schedule▼ Send▼ Help

Edit Information for Mike Johnson

Name: Mike Johnson

Email address: mike@home.com

Phone number: 270-555-1212

Contact by: both ▼

Positions: 

Communion AssistantGreeterScripture Reader

Days unavailable: 2025-01-01 Edit

Days desired: -none- Edit

Save

Cancel