

Scheduler

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

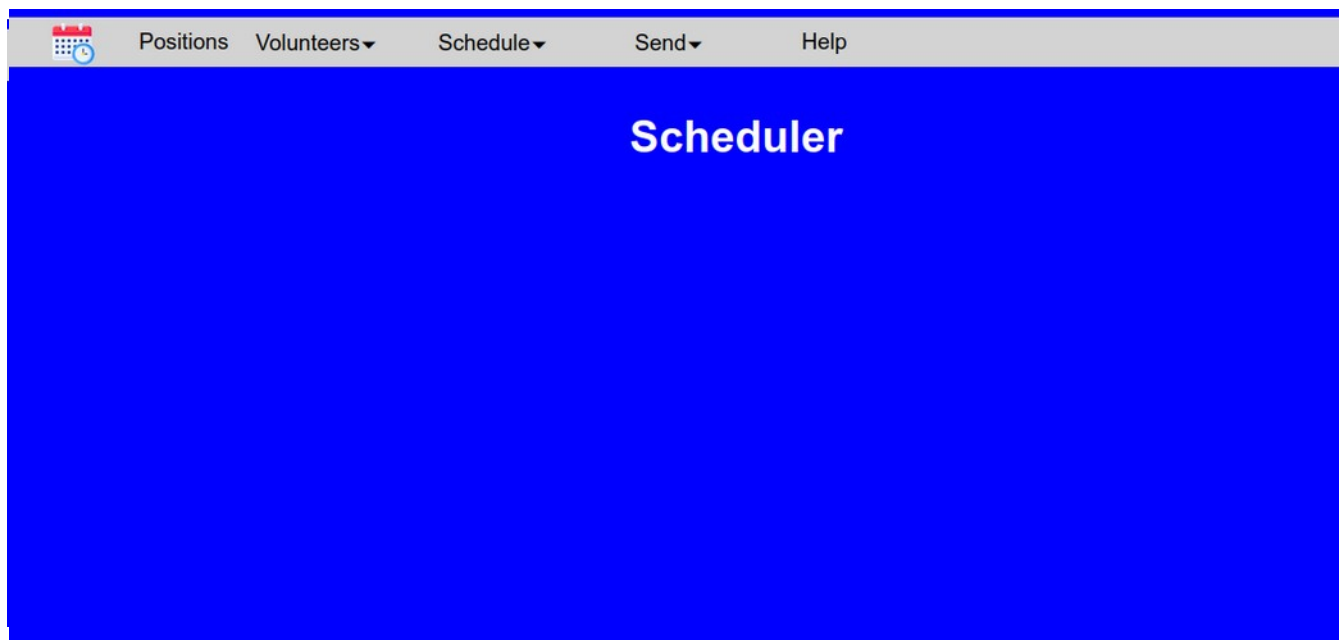
Here is a quick summary of the steps in getting started, with more detail following:

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. This will direct you to a screen that looks like this:

PositionsVolunteers▼Schedule▼Send▼Help

Volunteer Positions

--

Position:

Day Needed: Sunday ▼

Time when service needed: -- : -- --

Number of volunteers needed:

Save PositionDelete Position

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:



Positions

Volunteers▼

Schedule▼

Send▼

Help

Add Volunteers

Name:

Email address:

Phone number:

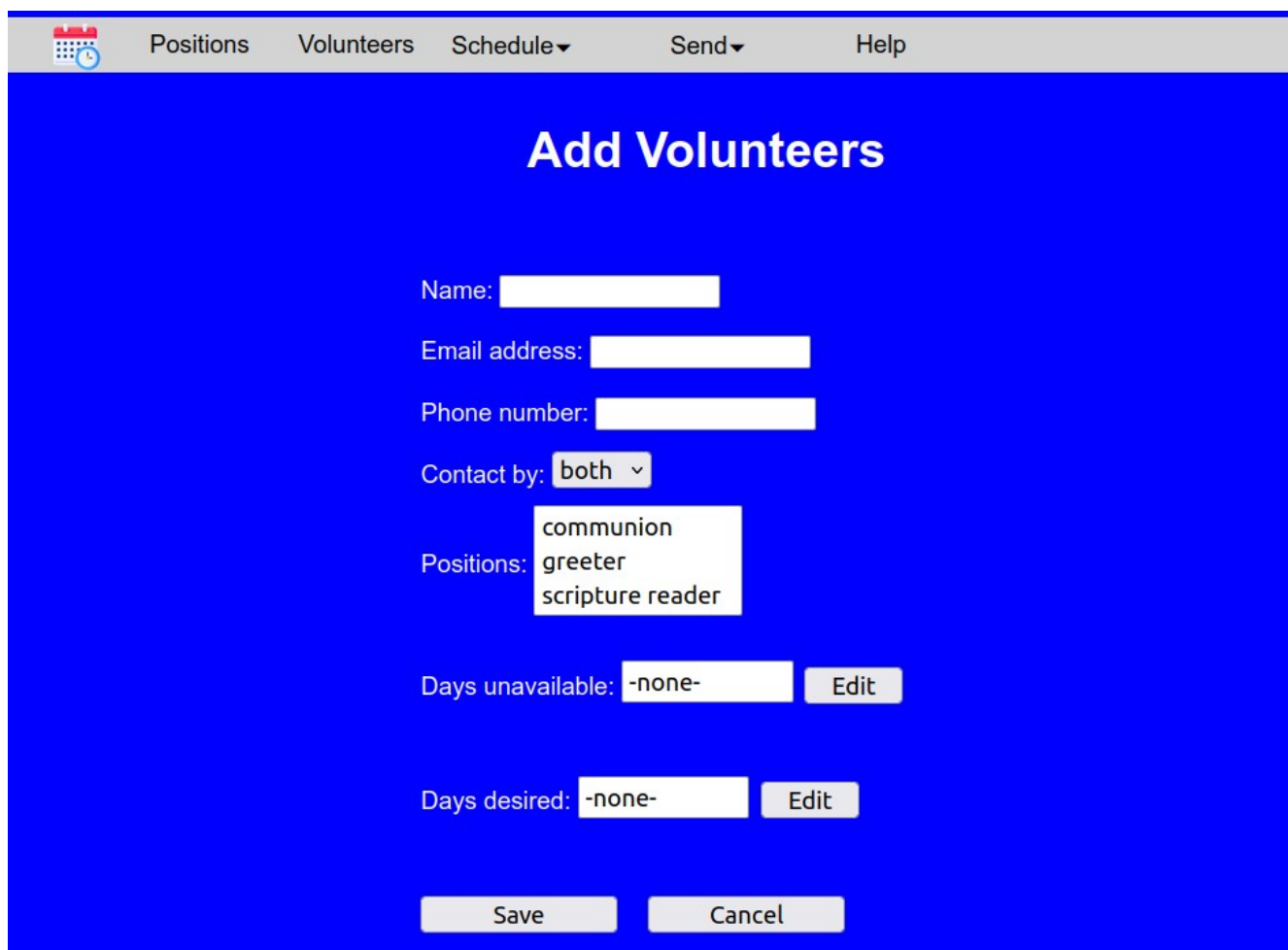
Contact by:

Positions:

Days unavailable:

Days desired:

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

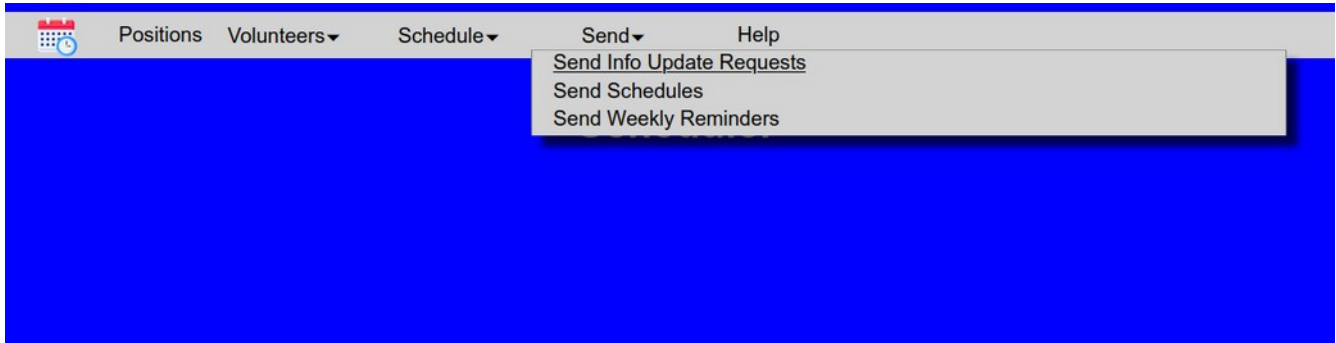


The screenshot shows a software interface with a menu bar at the top containing 'Positions', 'Volunteers', 'Schedule', 'Send', and 'Help'. Below the menu bar is a large blue area with the title 'Add Volunteers' in white. The form contains several input fields: 'Name:', 'Email address:', 'Phone number:', and 'Contact by:' (with a dropdown menu set to 'both'). Below these is a 'Positions:' dropdown menu with a list of options: 'communion', 'greeter', and 'scripture reader'. Further down are 'Days unavailable:' and 'Days desired:' fields, both with a '-none-' dropdown and an 'Edit' button. At the bottom are 'Save' and 'Cancel' buttons.

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 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 screen has a blue background. At the top, there is a menu bar with 'Positions', 'Volunteers', 'Schedule', 'Send', and 'Help'. Below the menu bar, the title 'Generate a Schedule' is displayed in large white text. Underneath the title, there is a paragraph of text: 'This will generate a schedule for the dates listed below, using the list of positions to fill and volunteers which you have previously entered.' Below this, another paragraph of text: 'If you have not already entered the positions to be filled and the available volunteers, please do so before pressing the "Build Schedule" button.' There are two input fields for dates: 'Start Date of Schedule:' and 'End Date of Schedule:'. Each field has a text input area showing 'mm / dd / yyyy' and a calendar icon to its right. At the bottom, there is a yellow button labeled 'Build 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.