

# BSCMail User Guide

## Introduction

BSCMail is a volunteer-management and scheduling application suitable for use by non-profit and for-profit organizations alike. It is easy to use and customizable to meet virtually any need.

BSCMail is distributed under the GNU General Public License. Please read the file LICENSE or visit <http://www.gnu.org/licenses/> for details.

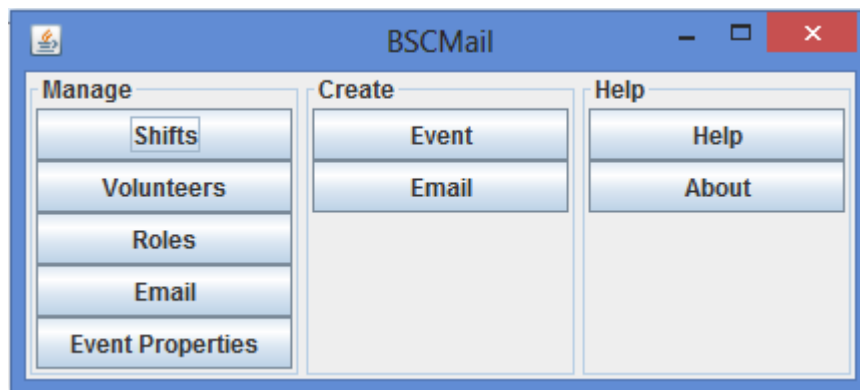
This guide corresponds to BSCMail version 3.2.

## Tutorial

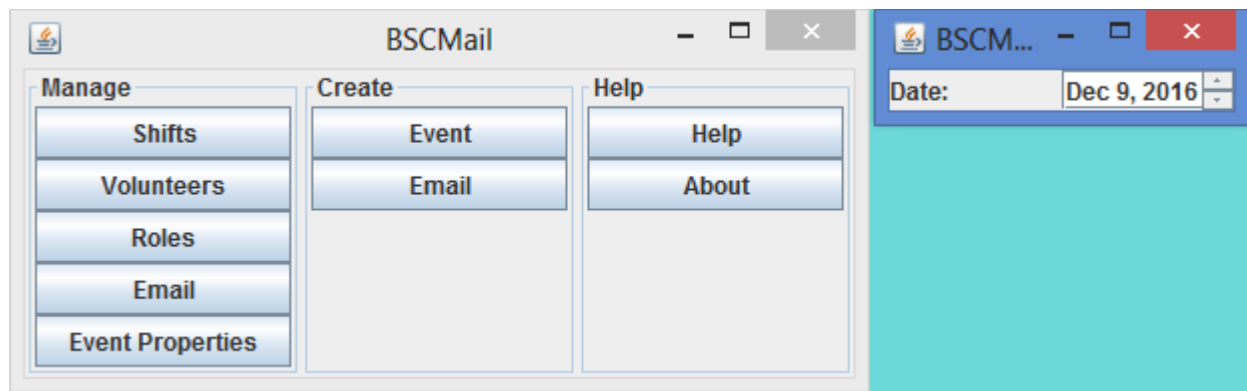
What is BSCMail?

BSCMail is an application that helps an organization manage volunteers and send scheduling emails. Let's run through some of the features of BSCMail together.

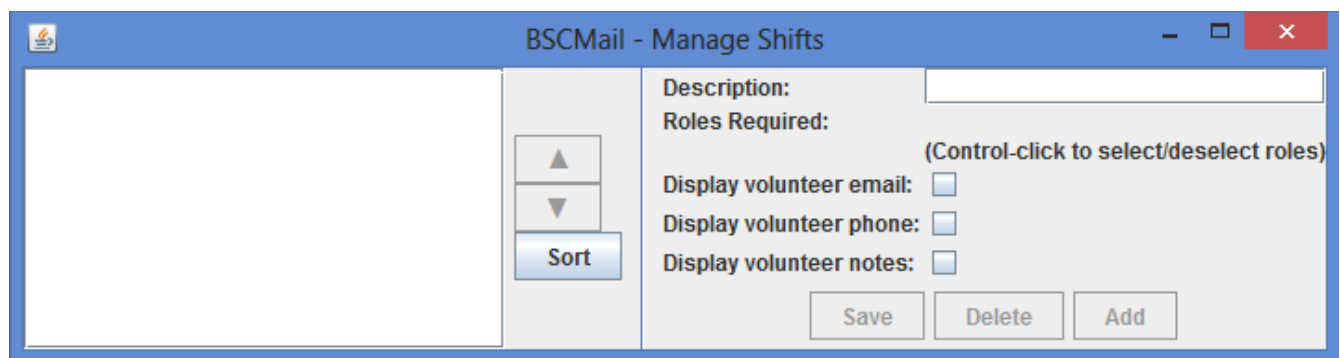
When you launch BSCMail, you see the [Main Window](#).



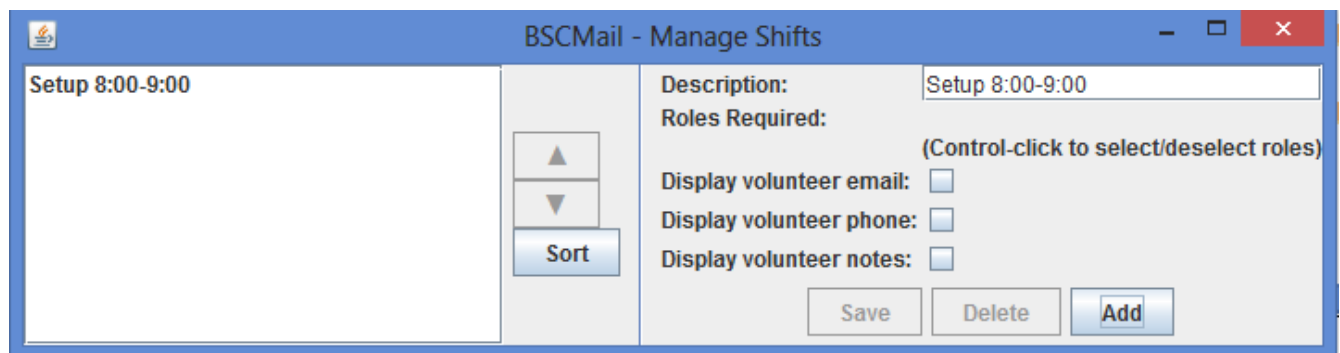
You're running an event, so click the **Event** button in the **Create** column.



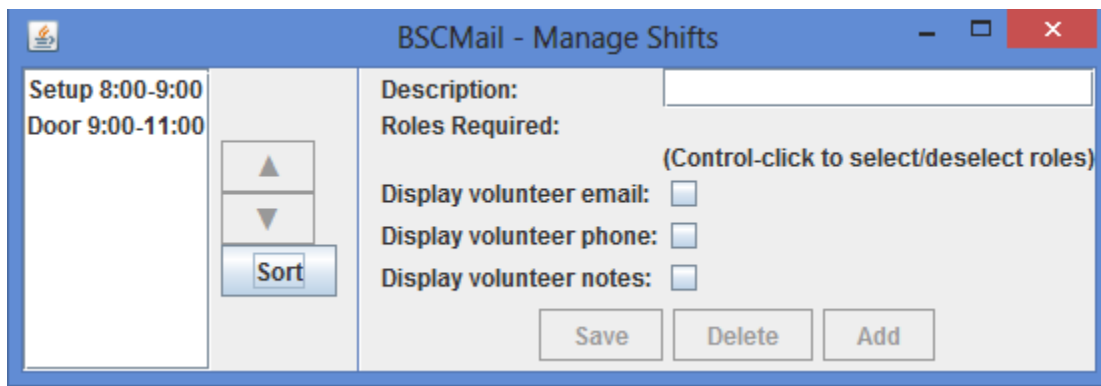
Hm. There's not much to do here. You can change the date of the event and... not much else. We need to add more definition to the event. Let's add some volunteer shifts. Click the Shifts button in the Manage column of the main window to launch the [Manage Shifts Window](#). You can leave the Event Setup window open.



There are no shifts defined in the application. Let's create one. Click in the **Description** text box, type "Setup 8:00-9:00", and then click the **Add** button.

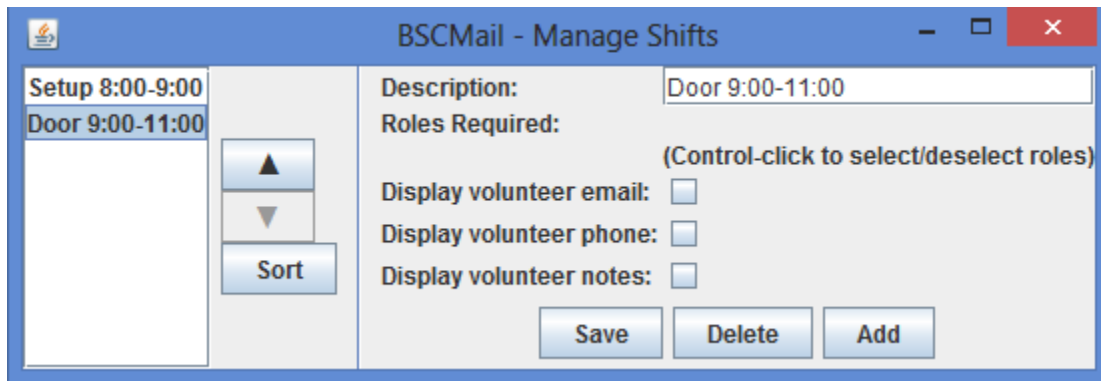


Let's add another shift. Change the text in the **Description** text box to "Door 9:00-11:00" and click the **Add** button.



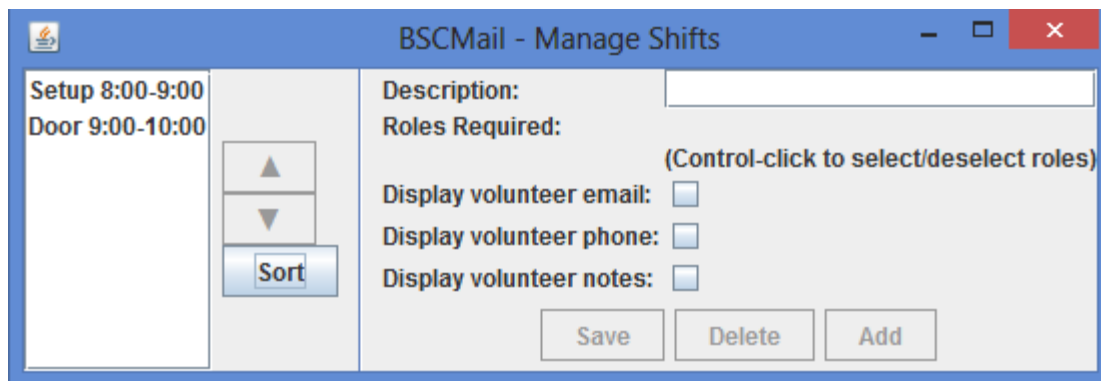
The window is titled "BSCMail - Manage Shifts". On the left, there is a list of shifts: "Setup 8:00-9:00" and "Door 9:00-11:00". Below this list are two arrow buttons (up and down) and a "Sort" button. The main area on the right contains a "Description:" label followed by an empty text box. Below that is a "Roles Required:" label with a note "(Control-click to select/deselect roles)". There are three checkboxes: "Display volunteer email:", "Display volunteer phone:", and "Display volunteer notes:". At the bottom right are three buttons: "Save", "Delete", and "Add".

Oops! We made an error; the shift goes until 10:00, not 11:00. Select the shift in the list on the left.



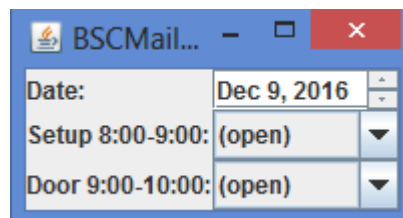
The window is titled "BSCMail - Manage Shifts". The shift "Door 9:00-11:00" is now highlighted in blue in the left list. The "Description:" text box now contains the text "Door 9:00-11:00". The other elements (roles, checkboxes, and buttons) remain the same.

Edit the description of the shift and click the **Save** button.



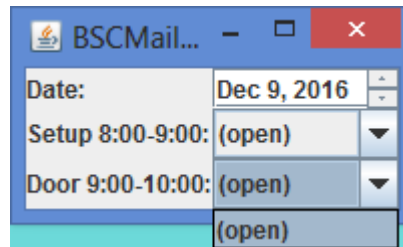
The window is titled "BSCMail - Manage Shifts". The shift "Door 9:00-11:00" is still highlighted. The "Description:" text box is now empty. The other elements remain the same.

Take another look at the Event Setup window.

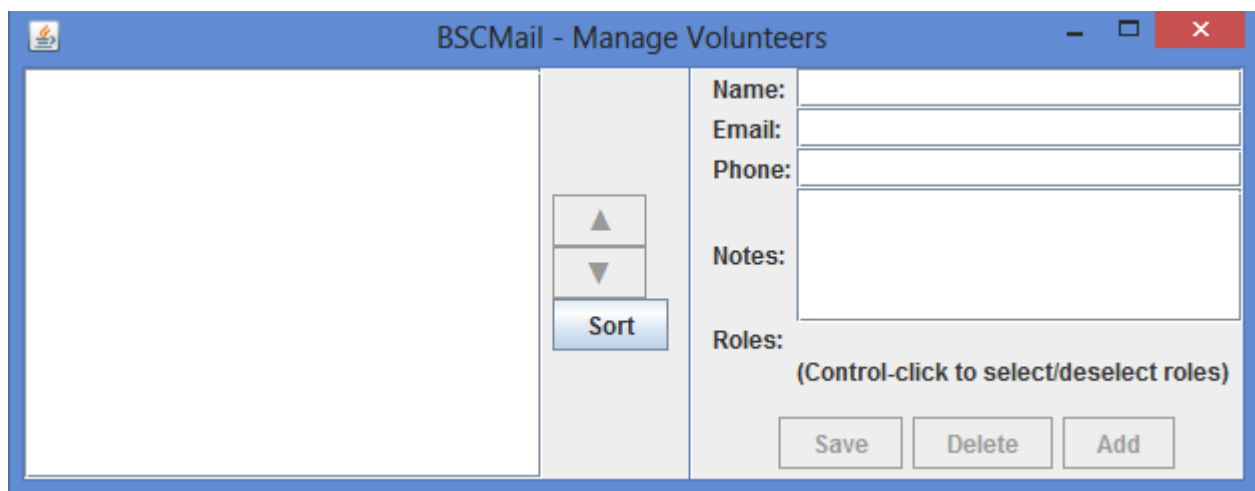


The window is titled "BSCMail...". It contains a "Date:" label with a date picker showing "Dec 9, 2016". Below that are two rows: "Setup 8:00-9:00:" followed by a dropdown menu showing "(open)", and "Door 9:00-10:00:" followed by a dropdown menu showing "(open)".

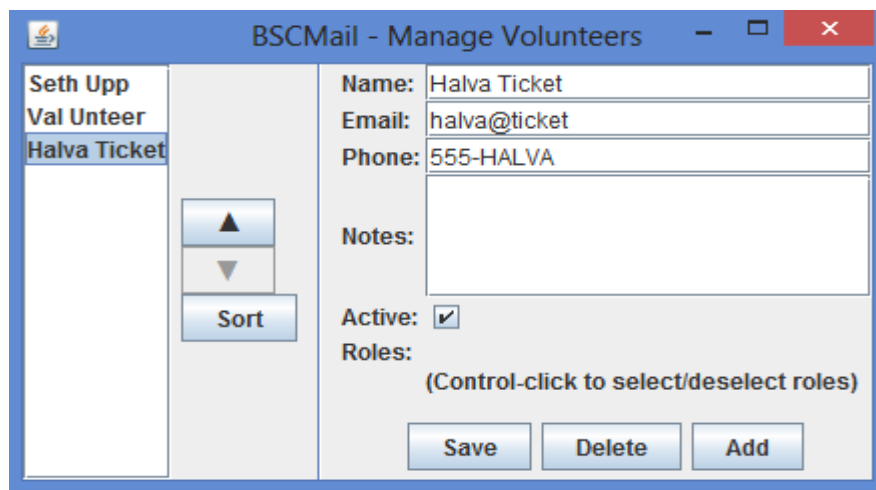
The shifts you added automatically appeared. Most of the changes you will make in other screens will automatically be reflected in the Event Setup window. Now let's try to assign a volunteer to one of the shifts. Click one of the dropdown boxes next to the shifts.

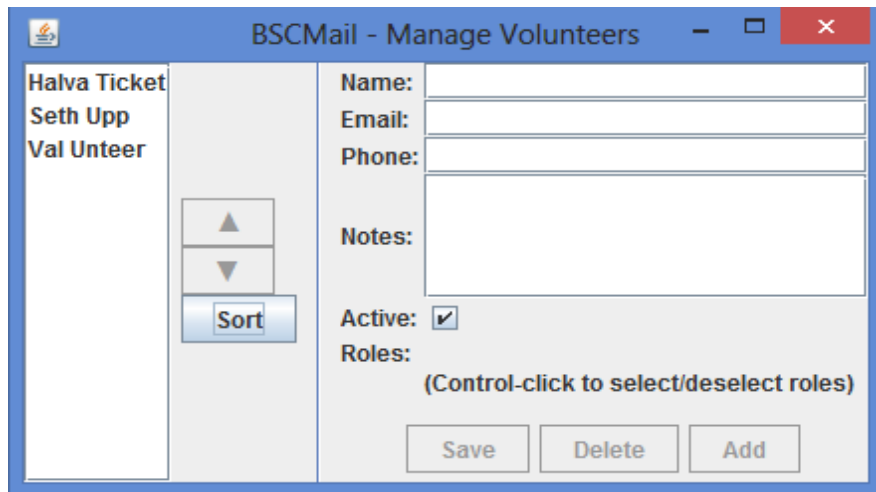


Whoops! We don't have any volunteers defined. Go back to the Main Window and click the **Volunteers** button in the **Setup** column to launch the [Manage Volunteers Window](#).



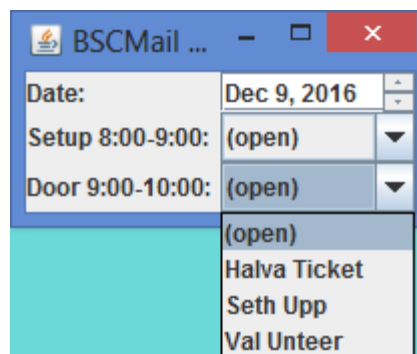
The Manage Volunteers Window works similarly to the Manage Shifts Window. Let's enter a few volunteers. Enter the volunteer's name, email address, and phone number in the appropriate text boxes and click the **Add** button. Do this a few times to create some volunteers.





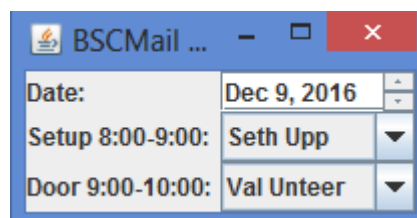
The window titled "BSCMail - Manage Volunteers" contains a list of volunteers on the left: Halva Ticket, Seth Upp, and Val Unteer. To the right of the list are up and down arrow buttons and a "Sort" button. Further right are input fields for Name, Email, and Phone, followed by a larger Notes field. Below these is an "Active" checkbox (checked) and a "Roles" section with the instruction "(Control-click to select/deselect roles)". At the bottom right are "Save", "Delete", and "Add" buttons.

Notice that the volunteers have been sorted. Now let's assign them to the shifts for the event. Go to the Event Setup Window and try clicking on one of the dropdowns again.



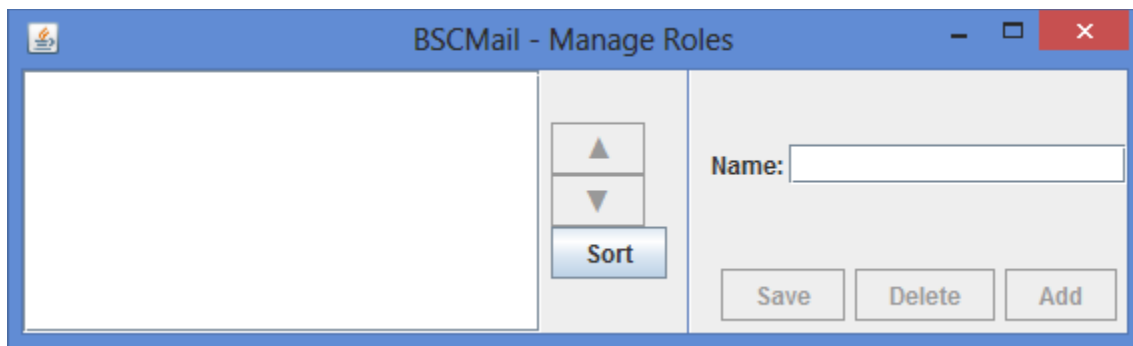
The window titled "BSCMail ..." shows event setup details. It includes a "Date" field set to "Dec 9, 2016". Below are three shift slots: "Setup 8:00-9:00:" with a dropdown showing "(open)", "Door 9:00-10:00:" with a dropdown showing "(open)", and a third slot with a dropdown showing "(open)". A dropdown menu is open for the third slot, displaying the list of volunteers: Halva Ticket, Seth Upp, and Val Unteer.

Good, we have some volunteers. Select some volunteers from the dropdowns to assign them to the shifts.

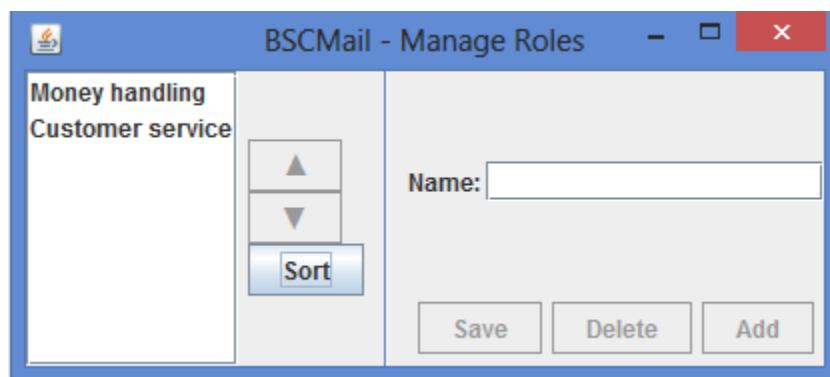


The window titled "BSCMail ..." shows the event setup with volunteers assigned. The "Date" field is "Dec 9, 2016". The "Setup 8:00-9:00:" slot now shows "Seth Upp" in the dropdown. The "Door 9:00-10:00:" slot now shows "Val Unteer" in the dropdown.

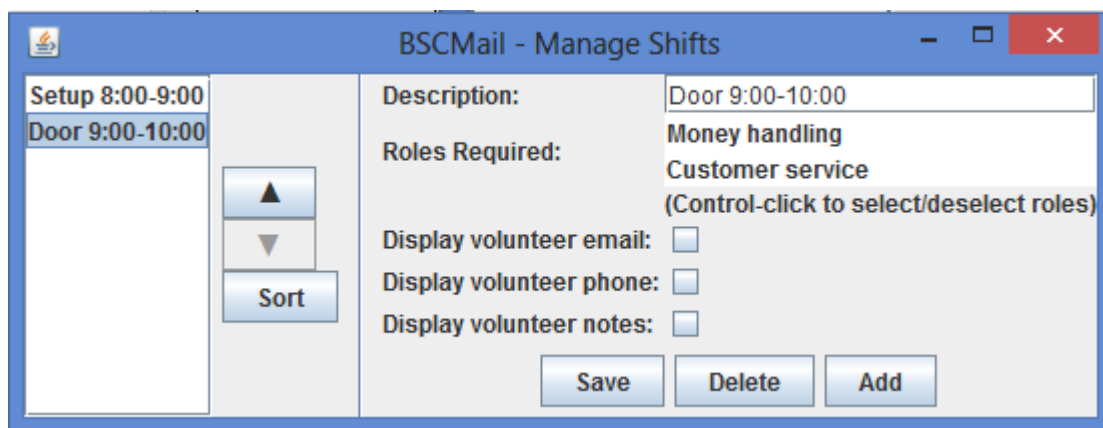
Great! We're able to use BSCMail to schedule volunteers now. But we can add a little bit of sophistication to the way we schedule. Suppose we want to restrict a shift to a certain subset of volunteers. (For instance, suppose we want to restrict the Door 9:00-10:00 shift to a set of volunteers who are trusted to handle money.) To do this, we need to create some volunteer roles. Go back to the Main Window and click the **Roles** button in the **Setup** column to launch the [Manage Roles Window](#).



The Manage Roles Window works similarly to the Manage Shifts Window and Manage Volunteers Window. Let's add a new role. Type "Money handling" in the **Name** text box and click the **Add** button. While we're at it, let's add another role called "Customer service".



Good. Now let's assign a role to the door shift. Return to the Manage Shifts Window and select the Door 9:00-10:00 shift.



When you select a shift, all the defined volunteer roles are listed in the right pane. All the roles required by the shift will show up as selected. As you can see, no roles have been selected for this shift. Select the "Money handling" role and click the **Save** button.<sup>1</sup> Now we need to assign this role to a volunteer. Return to the Manage Volunteers Window and select a volunteer. Select the "Money handling" role and click the **Save** button.

<sup>1</sup>To select multiple roles, hold the **Ctrl** button while you click. Ctrl+click toggles an individual role on or off.

**BSCMail - Manage Volunteers**

Halva Ticket  
Seth Upp  
Val Unteer

▲  
▼  
Sort

Name: Halva Ticket  
Email: halva@ticket  
Phone: 555-HALVA

Notes:

Active: ☒

Roles: Money handling  
Customer service  
(Control-click to select/deselect roles)

Save Delete Add

Now return to the Event Setup Window. Click the dropdown next to the Door 9:00-10:00 shift.

**BSCMail ...**

Date: Dec 9, 2016

Setup 8:00-9:00: (open)

Door 9:00-10:00: (open)

(open)  
Halva Ticket

Notice that only the volunteers with the appropriate roles are listed! It would be nice, however, if we could add a bit more information to the event, such as the location. (The event moves around from week to week.) Go back to the Main Window and click the **Event Properties** button in the **Manage** column to launch the [Manage Event Properties Window](#).

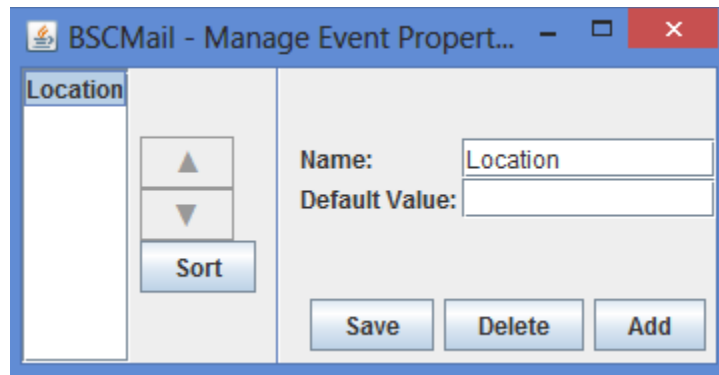
**BSCMail - Manage Event Properties**

▲  
▼  
Sort

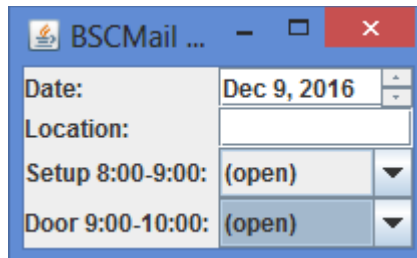
Name:   
Default Value:

Save Delete Add

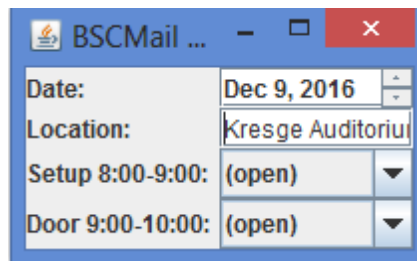
The Manage Event Volunteers Window works similarly to the Manage Shifts Window, Manage Volunteers Window, and Manage Role Window. Let's add a new property. Type "Location" in the **Name** text box and click the **Add** button.



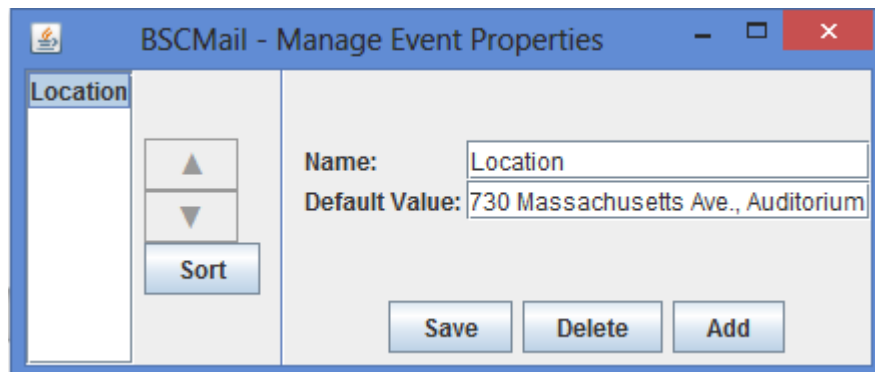
Now return to the Event Setup Window.



Notice that “Location” has been added to the Event Setup Window. We can type any value into this field. Enter a location.



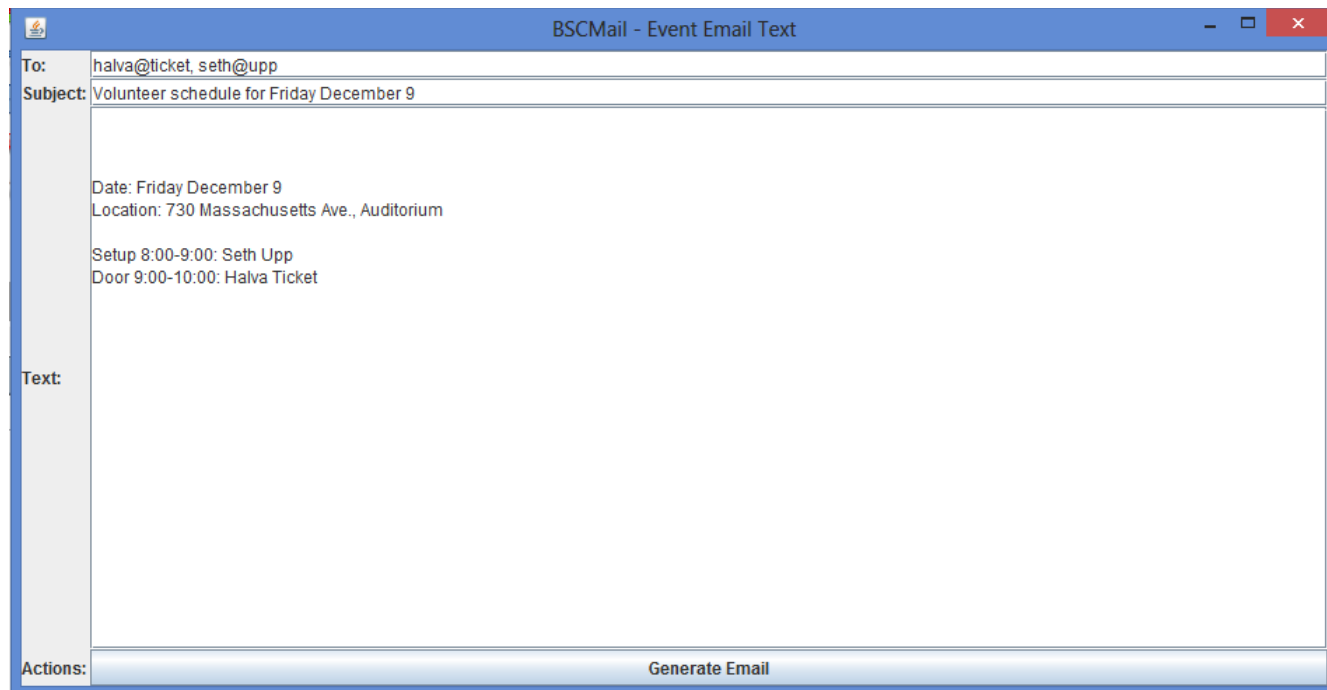
It is possible to enter a default value for a property. (Say, if the event can move from week to week but is usually in one specific place.) Return to the Manage Event Property Window, select “Location” from the list and enter a default value.





The Event Setup Window will display the default value for any event property when it is first opened. You may change value for the event by typing in the Event Setup Window. (This will not affect the default value.)

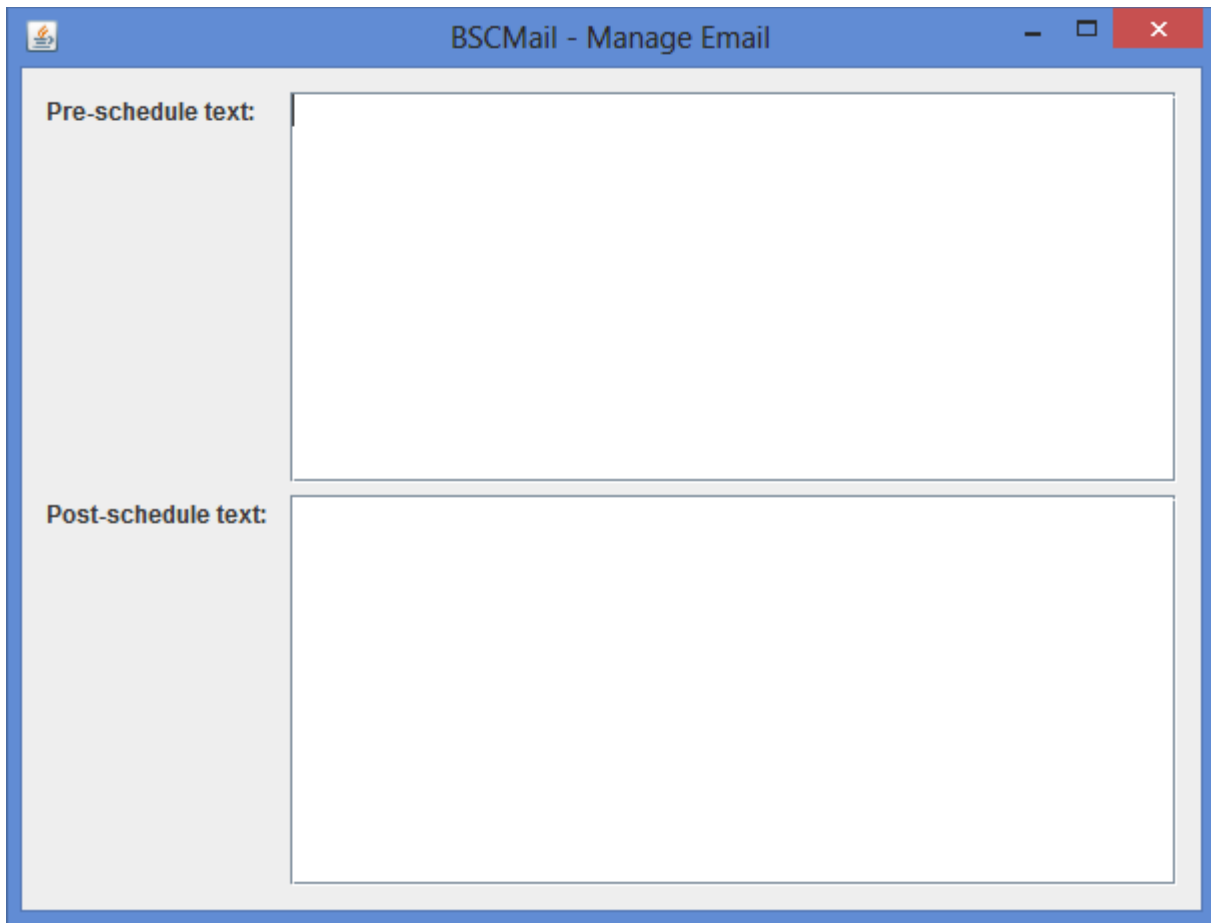
The event is looking pretty good now. Let's create the scheduling email. Assign some volunteers to the shifts, then go back to the Main Window and click the **Email** button in the **Create** column to launch the [Event Email Text Window](#).



The screenshot shows a window titled "BSCMail - Event Email Text". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The window contains several input fields and a button:


- To:** A text field containing "halva@ticket, seth@upp".
- Subject:** A text field containing "Volunteer schedule for Friday December 9".
- Text:** A large text area containing the following text:  
Date: Friday December 9  
Location: 730 Massachusetts Ave., Auditorium  
  
Setup 8:00-9:00: Seth Upp  
Door 9:00-10:00: Halva Ticket
- Actions:** A button labeled "Generate Email" at the bottom right.

Well, that's helpful at least. The email addresses of all the volunteers are listed in the **To** field, an appropriate subject line has been placed in the **Subject** field, and the event properties and volunteer schedule have been placed in the **Text** field. It would be nice if we could add a bit more detail, though. Close this window, return to the Main Window, and click the **Email** button in the **Manage** column to launch the [Manage Email Window](#).



The image shows a software window titled "BSCMail - Manage Email". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main content area is divided into two sections. The top section is labeled "Pre-schedule text:" and contains a large, empty text input field. The bottom section is labeled "Post-schedule text:" and also contains a large, empty text input field. The labels are in a bold, black font.

This window allows you to define the email template. The text in the **Pre-schedule text** field will appear before the event schedule, while the text in the **Post-schedule text** field will appear after. Try typing some text into the fields. The text will be automatically saved as you type.

 BSCMail - Manage Email — □ ×

<b>Pre-schedule text:</b>	Here is tonight's schedule.
<b>Post-schedule text:</b>	Let me know if you have any questions!  Sincerely, Volunteer Coordinator

Now re-open the Email Text Window.

The screenshot shows a window titled "BSCMail - Event Email Text". It contains an email template with the following fields and text:

**To:** halva@ticket, seth@upp  
**Subject:** Volunteer schedule for Friday December 9

Here is tonight's schedule.

Date: Friday December 9  
Location: 730 Massachusetts Ave., Auditorium

Setup 8:00-9:00: Seth Upp  
Door 9:00-10:00: Halva Ticket

Let me know if you have any questions!

Sincerely,  
Volunteer Coordinator

**Actions:** Generate Email

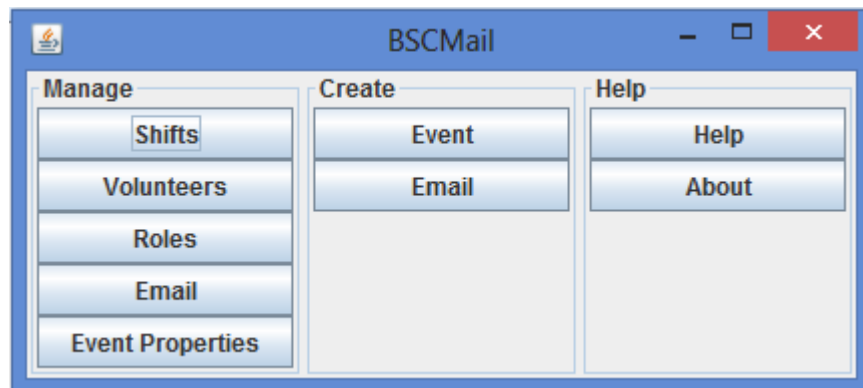
Now that's a good-looking email! You can edit any of the fields in this window; it will not change the email template. You can copy and paste the text into an email program, or click the **Generate Email** button to automatically send an email from your default email program.

We have reached the end of this tutorial. For more information on how BSCMail works, refer to the remainder of this guide.

Happy scheduling!

## GUI Reference

### Main Window



The BSCMail main window is the starting point when the application is launched. There are a number of buttons on the main window, each performing a different function. Note that the buttons are grouped into three columns: **Manage**, **Create**, and **Help**. The buttons perform the following functions.

The **Manage, Shifts** button opens the [Manage Shifts window](#), which allows you to manage volunteer shifts for events.

The **Manage, Volunteers** button opens the [Manage Volunteers window](#), which allows you to manage the list of volunteers.

The **Manage, Roles** button opens the [Manage Roles window](#), which allows you to define specific volunteer roles.

The **Manage, Email** button opens the [Manage Email window](#), which allows you to define a template for sending scheduling emails.

The **Manage, Event Properties** button opens the [Manage Event Properties window](#), which allows you to define custom properties for your event.

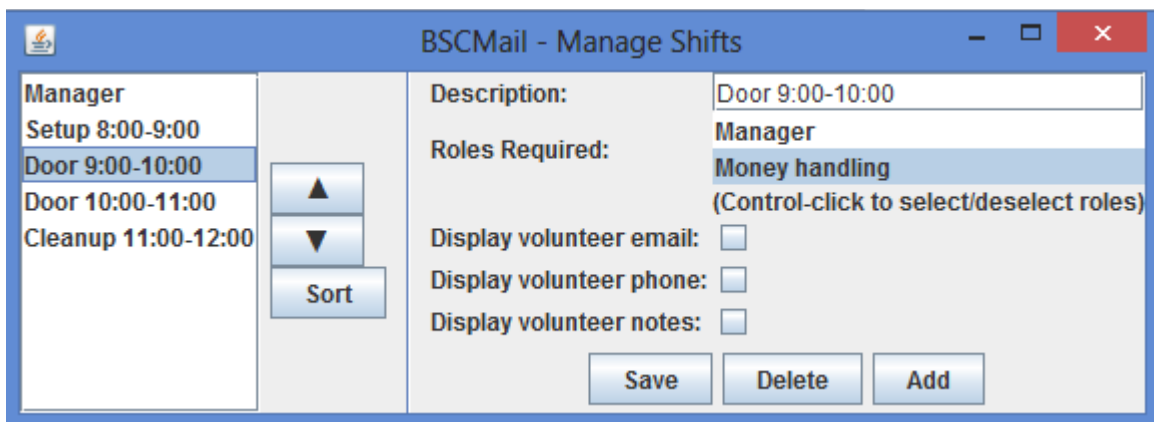
The **Create, Event** button opens the [Event Setup window](#), which allows you to assign volunteers to and write information for a specific event.

The **Create, Email** button opens the [Event Email Text window](#), which displays a custom crafted scheduling message for your event.

The **Help, Help** button opens this user guide.

The **Help, About** button opens a window displaying information about this version of BSCMail.

## Manage Shifts Window



The Manage Shifts window allows you to manage volunteer shifts.

The pane on the left lists all the shifts defined in the application. You can auto-sort the list by clicking the **Sort** button, or you can manually move shifts by selecting them in the list and clicking the ▲ or ▼ buttons.

The pane on the right displays the properties of the selected shift.

The **Description** text box displays the shift's description.

The **Roles Required** list control displays the volunteer roles necessary for the shift.

The **Display volunteer email**, **Display volunteer phone**, and **Display volunteer notes** checkboxes all control what volunteer information is displayed in the scheduling message. This information may be displayed on a shift-by-shift basis.

To edit the properties of a shift, select the shift from the list, edit the properties to your liking and click the **Save** button. To delete a shift, select it from the list and click the **Delete** button. To create a new shift, edit the properties in the left pane to your liking and click the **Add** button. The shift will appear at the bottom of the list.

## Manage Volunteers Window

The screenshot shows the 'BSCMail - Manage Volunteers' window. The left pane contains a list of volunteers: Ann Charge, Halva Ticket, Manny Ager, Pasha Brum, Seth Upp, and Val Unteer. Below the list are up and down arrow buttons and a 'Sort' button. The right pane shows the details for the selected volunteer, Val Unteer. It includes text boxes for Name, Email, and Phone. A Notes text area is below these. An 'Active' checkbox is checked. A 'Roles' section lists 'Money handling' and 'Customer service' with a note '(Control-click to select/deselect roles)'. At the bottom are 'Save', 'Delete', and 'Add' buttons.

The Manage Volunteer window allows you to manage volunteers.

The pane on the left lists all the volunteers defined in the application. You can auto-sort the list by clicking the **Sort** button, or you can manually move volunteers by selecting them in the list and clicking the ▲ or ▼ buttons.

The pane on the left displays the properties of the selected volunteer.

The **Name** text box displays the volunteer's name.

The **Email** text box displays the volunteer's email address.

The **Phone** text box displays the volunteer's phone number.

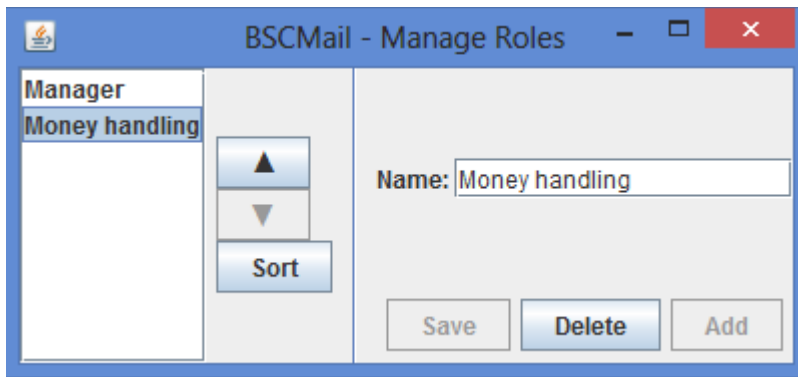
The **Notes** text box displays notes about the volunteer.

The **Active** check box is checked if the volunteer is currently active, or unchecked if the volunteer is inactive.

The **Roles Required** list control displays the roles assigned to the volunteer.

To edit the properties of a volunteer, select the volunteer from the list, edit the properties to your liking and click the **Save** button. To delete a volunteer, select it from the list and click the **Delete** button. To create a new volunteer, edit the properties in the left pane to your liking and click the **Add** button. The volunteer will appear at the bottom of the list.

## Manage Roles



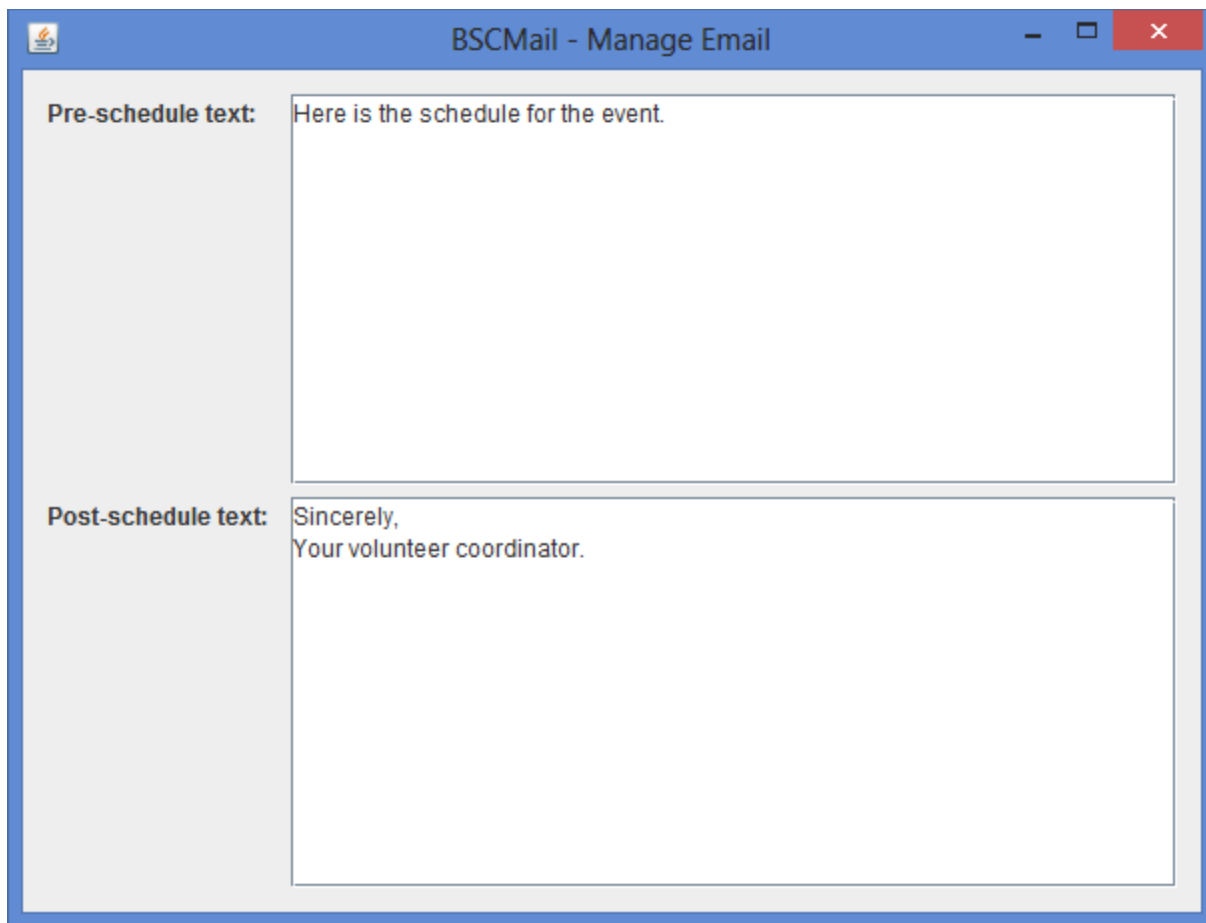
The Manage Roles window allows you to manage roles.

The pane on the left lists all the roles defined in the application. You can auto-sort the list by clicking the **Sort** button, or you can manually move roles by selecting them in the list and clicking the ▲ or ▼ buttons.

The pane on the left displays the properties of the selected role. Roles have only a single property, **Name**.

To change the name of a role, select the role from the list, edit the name to your liking and click the **Save** button. To delete a role, select it from the list and click the **Delete** button. To create a new volunteer, enter the new name in the left pane and click the **Add** button. The role will appear at the bottom of the list.

## Manage Email Window

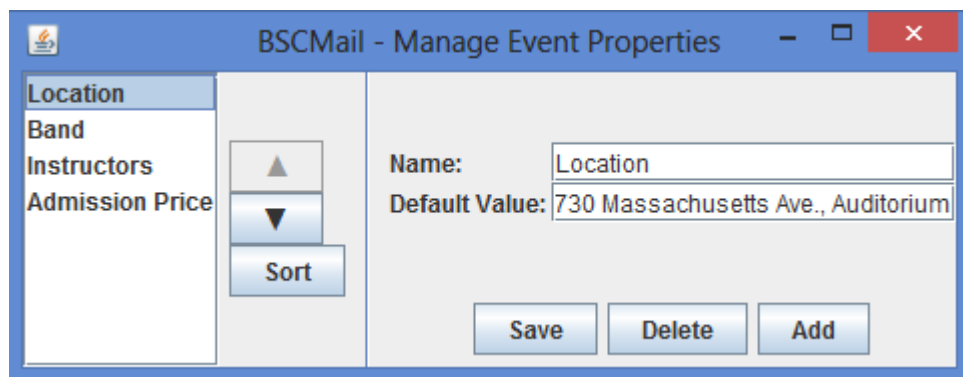


The image shows a window titled "BSCMail - Manage Email". It has a blue title bar with standard window controls. The main area is divided into two sections. The top section is labeled "Pre-schedule text:" and contains a text area with the text "Here is the schedule for the event.". The bottom section is labeled "Post-schedule text:" and contains a text area with the text "Sincerely,  
Your volunteer coordinator.".

The Manage Email window allows you to edit the email template used to create the scheduling email.

The **Pre-schedule text** text area displays the text that is placed before the schedule in the scheduling email. The **Post-schedule text** text area displays the text that is placed after the schedule in the scheduling email. To edit either text, simply type in the corresponding text area; the changes will be automatically saved.

## Manage Event Properties Window



The image shows a window titled "BSCMail - Manage Event Properties". It has a blue title bar with standard window controls. The main area is divided into three sections. On the left is a list box containing "Location", "Band", "Instructors", and "Admission Price". To the right of the list box are two arrow buttons (up and down) and a "Sort" button. On the right side of the window, there are two text boxes: "Name:" with the value "Location" and "Default Value:" with the value "730 Massachusetts Ave., Auditorium". At the bottom right are three buttons: "Save", "Delete", and "Add".

The Manage Event Properties window allows you to manage event properties.



The pane on the left lists all the event properties defined in the application. You can auto-sort the list by clicking the **Sort** button, or you can manually move event properties by selecting them in the list and clicking the ▲ or ▼ buttons.

The pane on the left displays the properties of the selected event property.

The **Name** text box displays the name of the event property.

The **Default Value** text box displays the default value of the event property.

To edit the properties of an event property, select the event property from the list, edit the properties to your liking and click the **Save** button. To delete an event property, select it from the list and click the **Delete** button. To create a new event property, edit the properties in the left pane to your liking and click the **Add** button. The event property will appear at the bottom of the list.

## Event Setup Window

Date:	Dec 2, 2016
Location:	730 Massachusetts Ave., Auditorium
Band:	
Instructors:	
Admission Price:	\$
Manager:	(open) ▼
Setup 8:00-9:00:	(open) ▼
Door 9:00-10:00:	(open) ▼
Door 10:00-11:00:	(open) ▼
Cleanup 11:00-12:00:	(open) ▼

- (open)
- Ann Charge
- Halva Ticket
- Manny Ager
- Pasha Brum**
- Sarah Fimm
- Seth Upp
- Val Unteer

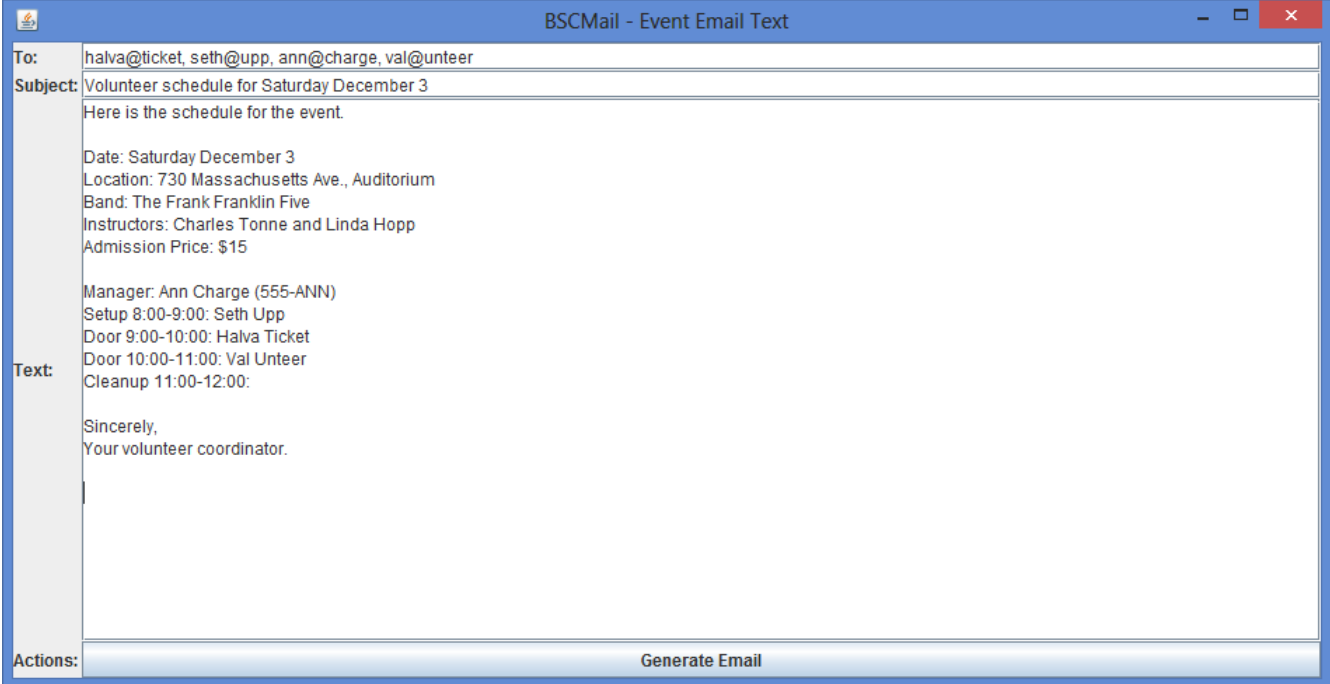
The Event Setup window allows you to create a specific event and assign data to it. The various data are listed on the window

The first field, labeled **Date**, is the date of the event. You can type in a date or use the up/down control to adjust the month, day, and year.

The next fields are the event properties as defined in the [Manage Event Properties window](#). The properties are all listed in order and filled in with their default values. You can leave them as-is or enter new values for this specific event. This window is dynamic; edits made in the Manage Event Properties window show up here in real time.

The final fields are the shifts as defined in the [Manage Shifts window](#). The shifts are all listed in order. Each shift has a dropdown box containing a list of all the volunteers who are active and eligible for that shift; select one to assign them to the shift, or select “(open)” to select no volunteer. This window is dynamic; edits made to shifts in the Manage Shifts window and edits made to volunteers in the [Manage Volunteers window](#) show up here in real time.

## Event Email Text Window



The screenshot shows a window titled "BSCMail - Event Email Text". It contains three main text input areas: "To:", "Subject:", and "Text:". The "To:" field contains the email addresses "halva@ticket, seth@upp, ann@charge, val@unteer". The "Subject:" field contains "Volunteer schedule for Saturday December 3". The "Text:" field contains a pre-filled email message. At the bottom, there is an "Actions:" section with a "Generate Email" button.

**To:** halva@ticket, seth@upp, ann@charge, val@unteer

**Subject:** Volunteer schedule for Saturday December 3

Here is the schedule for the event.

Date: Saturday December 3  
Location: 730 Massachusetts Ave., Auditorium  
Band: The Frank Franklin Five  
Instructors: Charles Tonne and Linda Hopp  
Admission Price: \$15

Manager: Ann Charge (555-ANN)  
Setup 8:00-9:00: Seth Upp  
Door 9:00-10:00: Halva Ticket  
Door 10:00-11:00: Val Unteer  
Cleanup 11:00-12:00:

Sincerely,  
Your volunteer coordinator.

**Actions:** Generate Email

The Event Email Text window constructs and displays a scheduling email for the event defined in the [Event Setup window](#). The email is based off of the email template defined in the [Manage Email window](#).

The email is placed in three text boxes. The **To** text box lists the email addresses of all the volunteers assigned to the event. The **Subject** text box lists an appropriate subject line containing the date of the event. The **Text** text box contains the email message. All the event properties and shifts with volunteers are listed. Each of the text boxes is editable, so you can make any last-minute alterations you desire.

The **Generate Email** button sends the email using your default email application.

## Data Format

The data for BSCMail is contained in XML files stored in the program directory. The files are as follows.

- emailTemplate.xml — the email template
- eventProperties.xml — the list of event properties

- `roles.xml` — the list of volunteer roles
- `shifts.xml` — the list of volunteer shifts
- `volunteers.xml` — the list of volunteers

The data files are updated by the application in real time. They ought not be edited by hand, although they are human-readable for the sake of convenience.

`emailTemplate.xml`:

- The root element of `emailTemplate.xml` is `<emailtemplate-list>`. It contains exactly one child element, `<emailtemplate>`.
- The `<emailtemplate>` element corresponds to the application's email template. It contains two child elements: `<preScheduleText>` and `<postScheduleText>`.
- `<preScheduleText>` is a text node containing the pre-schedule text of the email template.
- `<postScheduleText>` is a text node containing the post-schedule text of the email template.

`eventProperties.xml`

- The root element of `eventProperties.xml` is `<eventproperty-list>`. It corresponds to the list of event properties. It contains a number of child elements of type `<eventproperty>`.
- Each `<eventproperty>` element corresponds to an event property. Each contains three child elements: `<name>`, `<defaultValue>`, and `<value>`.
- `<name>` is a text node containing the name of the event property.
- `<defaultValue>` is a text node containing the default value of the event property.
- `<value>` is an empty node.

`roles.xml`

- The root element of `roles.xml` is `<role-list>`. It corresponds to the list of volunteer roles. It contains a number of child elements of type `<role>`.
- Each `<role>` element corresponds to a volunteer role. Each contains one child element: `<name>`.
- `<name>` is a text node containing the name of the volunteer role.

`shifts.xml`

- The root element of `shifts.xml` is `<shift-list>`. It corresponds to the list of volunteer shifts. It contains a number of child elements of type `<shift>`.
- Each `<shift>` element corresponds to a volunteer shift. Each contains five child elements: `<description>`, `<roles>`, `<displayVolunteerEmail>`, `<displayVolunteerPhone>`, and `<displayVolunteerNotes>`.
- `<description>` is a text node containing the description of the volunteer shift.
- `<roles>` is a text node containing a comma-delimited list of the volunteer roles required by the volunteer shift.
- `<displayVolunteerEmail>` is a text node containing the value of the “display volunteer email” property of the volunteer shift.
- `<displayVolunteerPhone>` is a text node containing the value of the “display volunteer phone” property of the volunteer shift.
- `<displayVolunteerNotes>` is a text node containing the value of the “display volunteer notes” property of the volunteer shift.

## volunteers.xml

- The root element of `volunteers.xml` is `<volunteer-list>`. It corresponds to the list of volunteers. It contains a number of child elements of type `<volunteer>`.
- Each `<volunteer>` element corresponds to a volunteer. Each contains five child elements: `<name>`, `<email>`, `<phone>`, `<notes>`, and `<roles>`.
- `<name>` is a text node containing the name of the volunteer.
- `<email>` is a text node containing the email address of the volunteer.
- `<phone>` is a text node containing the phone number of the volunteer.
- `<notes>` is a text node containing the notes about the volunteer.
- `<roles>` is a text node containing a comma-delimited list of the roles possessed by the volunteer.