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.

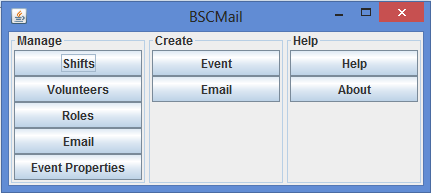
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This guide corresponds to BSCMail version 3.0.

# Tutorial

# 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](#_toc39), which allows you to manage volunteer shifts for events.

The **Manage, Volunteers** button opens the [Manage Volunteers window](#_toc41), which allows you to manage the list of volunteers.

The **Manage, Roles** button opens the [Manage Roles window](#_toc43), which allows you to define specific volunteer roles.

The **Manage, Email** button opens the [Manage Email window](#_toc45), which allows you to define a template for sending scheduling emails.

The **Manage, Event Properties** button opens the [Manage Event Properties window](#_toc47), which allows you to define custom properties for your event.

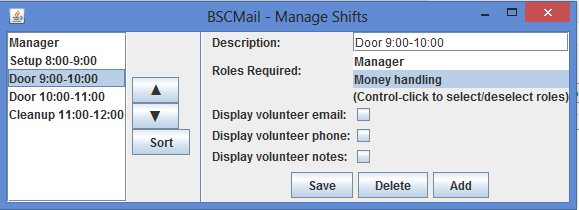
The **Create, Event** button opens the [Event Setup window](#_toc49), which allows you to assign volunteers to and write information for a specific event.

The **Create, Email** button opens the [Event Email Text window](#_toc51), 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.

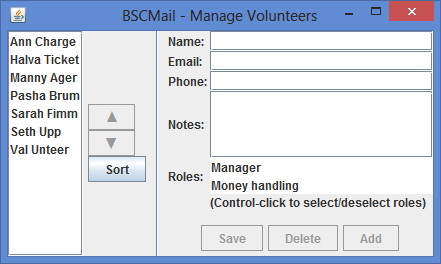
The **Description** text box displays the shift’s description.

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 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.

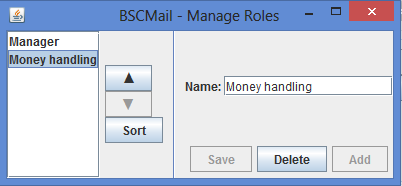
The **Phone** text box displays the volunteer’s phone number.

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

The **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



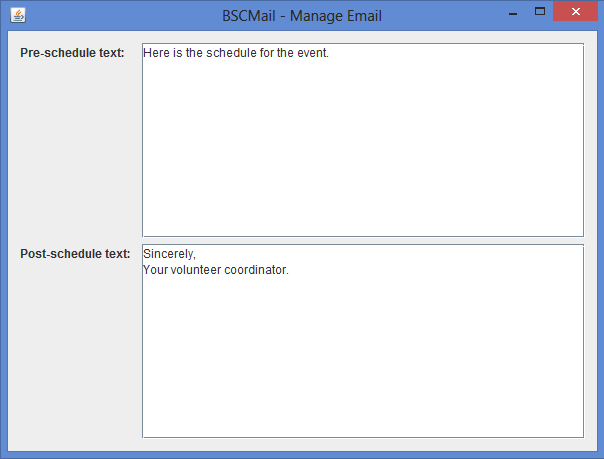
The Manage Roles window allows you to manage roles.

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.

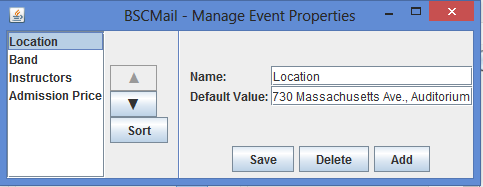
## Manage Email Window



The 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 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.

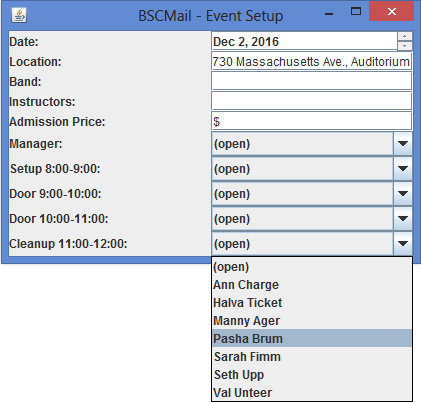
The pane on the left displays the properties of the selected event property.

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



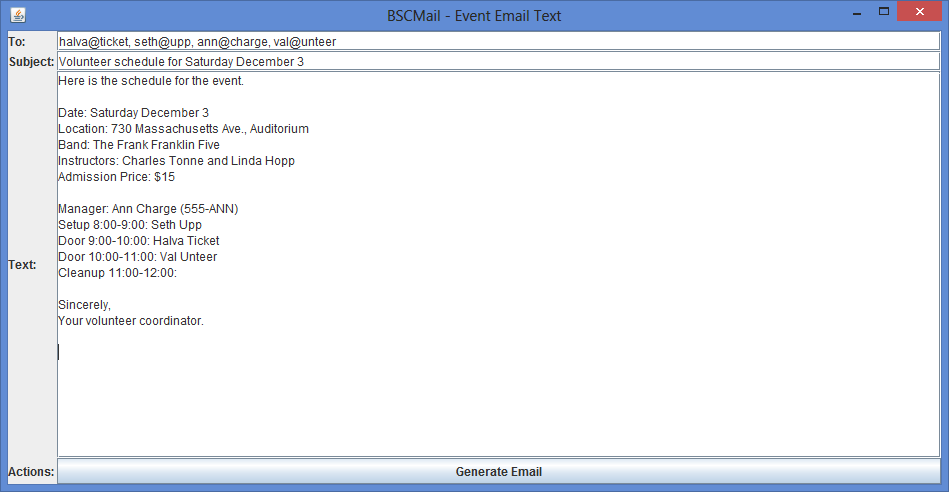
The Event Setup window allows you to create a specific event and assign data to it. The various data are listed on the window

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](#_toc106). 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](#_toc60). The shifts are all listed in order. Each shift has a dropdown box containing a list of all the volunteers who are 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](#_toc73) show up here in real time.

## Event Email Text Window



The Event Email Text window constructs and displays a scheduling email for the event defined in the [Event Setup window](#_toc118). The email is based off of the email template defined in the [Manage Email window](#_toc100).

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.