

Quick Start Guide



Volunteer Scheduler Pro

Effective Scheduling Software

1

Enter your jobs

Job refers to any task performed by your volunteers at a shift. For each shift, you can specify how many volunteers should be scheduled in each job.

1. Click on the Jobs pane.
2. Click “New Job.”
3. Name your job.

Edit Jobs: Cage Cleanup

Name: **Jobs head:**

Subdivisions	Schedule label
Puppies	Puppies
Dogs	Dog
Cats	Cat

☐ Qualify new volunteers for this subdivision by default

☐ Automatically number or label positions in schedules

[Edit description \(shown in online enrollment form\)...](#)

[Show more options for this subdivision...](#)

☐ Filter list | with...

☐ Bind together all subdivision qualifications

☐ Use titles to qualify volunteers in this jobs...

☐ Keep assignments in this jobs private

Skills and tasks

Subdivisions are used to distinguish between different positions within the same job by task or skill, such as scheduling Ushers at a specific location or designating who is a Head Nurse. You can specify different volunteers to be qualified to serve in each subdivision you create. Each volunteer can be designated for more than one subdivision when appropriate.

2

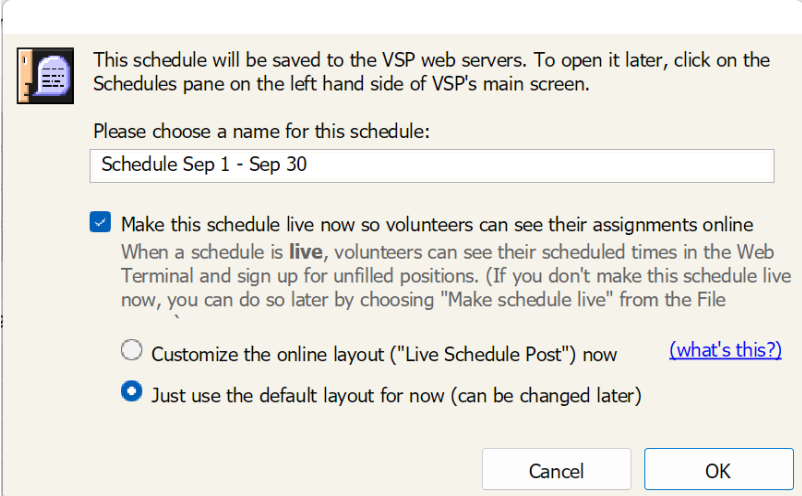
Creating a schedule

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 time for the shift.
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 volunteers from each job are required for this shift.
7. Click “OK.”
8. Repeat this process for all your other shifts.

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 dialog box is titled "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." It contains a text input field for the schedule name, which is currently "Schedule Sep 1 - Sep 30". Below the input field are two radio button options. The first option, "Make this schedule live now so volunteers can see their assignments online", is selected with a blue checkmark. The second option is "Customize the online layout ('Live Schedule Post') now", which is unselected. Below these options is a link "(what's this?)". At the bottom right of the dialog are two buttons: "Cancel" and "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

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Enter your volunteers

Volunteer refers to any person who will be scheduled in any of your jobs. There are several ways to go about entering your volunteers:

Manually enter volunteers to customize their complete profile.

1. Click the “New Volunteer...” button on the right side of the Volunteers pane.
2. Add the volunteer name, email, and qualified jobs, as well as any other information you want to track about that volunteer.

The screenshot shows the 'Edit Volunteer' form with two main sections: General Information and Scheduling Parameters.

General Information:

- First Name: [Text Field] ☐ Is a group
- Last Name: [Text Field] Title: [Text Field]
- Family: None [Text Field] New... [Button]
- ☐ Bind phone and address to family's
- ☐ Bind email address to family's
- ☐ Bind recurring shift preferences to family's
- Phone: [Text Field] [Dropdown Arrow]
- Cell: [Text Field] [Dropdown Arrow]
- E-mail: [Text Field] [Dropdown Arrow]
- ☐ This volunteer has internet access
- Address: [Text Field]
- Comments: [Text Area]
- Edit custom fields... [Button]

Scheduling Parameters:

- Jobs qualifications: ☐ Only show qualified jobs
- Front Desk: Qualified
- Cage Cleanup - Puppies: Qualified
- Cage Cleanup - Dogs: Qualified
- Cage Cleanup - Cats: Qualified
- Dog Walker: Qualified
- Vet Tech: Not Qualified
- Locations: All locations [Dropdown Arrow] Set [Dropdown Arrow]
- Shift preferences: ☐ Schedule only at these shifts
- Add [Dropdown Arrow]
- Remove [Button]
- Options... [Button]
- Preferred serving frequency: normal [Dropdown Arrow]
- Unavailable dates / times: [Text Field]
- Add... [Button]
- Remove [Button]
- Clean... [Button]
- ☐ Preassigned and manual scheduling only (don't auto-schedule)
- ☐ Make this volunteer inactive for now (don't schedule at all)

(You may hold down the Control key while clicking OK to create another volunteer.)

Cancel [Button] OK [Button]

Import volunteer contact information and custom fields from a .txt, .csv, .xls or .xlsx file. We recommend importing one spreadsheet per job so you can quickly qualify volunteers for their jobs during import.

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

1. Go to File - Import Volunteers.
2. From the menu under Available Fields, select the first field name listed on your spreadsheet, then click the “Add” to add it to the Fields to Import list on the right. Repeat this process for each field you wish to import in the order they appear on your spreadsheet.
3. If appropriate, go to the Job Qualifications menu below and select each job for which every volunteer on the spreadsheet to be imported will qualify.
4. Click the “Import” button at bottom, then choose your spreadsheet.

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Email an online enrollment form to a list of volunteers or contacts in order to collect their necessary information for your database. As people enroll, they will be added to the database as volunteers.

[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, You can click this to view or to send to your volunteers.

TIP

Recommended settings

Some settings of the volunteer profile are used to track volunteer availability and preferences. You will not need to use these sections if you are primarily having volunteers sign up for shifts online. You will only need to use the "Shift preferences" and "Preferred serving frequency" sections if you are using the availability based rotation model.

Shift preferences in the volunteer profile allow the auto-scheduler to prioritize the shift preferences in the order they appear on this list. If you do not check the "Schedule only at these times" box, VSP may schedule the volunteer at other shifts when needed.

Preferred serving frequency can be used to set a request on how often the auto-scheduler places a volunteer to serve. However, we highly recommend leaving most of your volunteers' frequency set to "Normal" to allow the auto-scheduler the most flexibility when creating your schedule.

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Scheduling volunteers

VSP accommodates many forms of scheduling, and you can mix and match to find the right method for your organization.

Self sign-up: Volunteers sign up for shifts online

1. Click the “Log in as...” button found in the lower right-hand corner of the Web Terminal pane.
2. Choose a volunteer. Log in to the Web Terminal as if you were that person.
3. Click on the “Full Schedules” tab at the top of the page, and then click on an unfilled position to sign up for a shift.
4. Once you submit the request, go back into VSP (minimize or close the web browser window) and click on the Web Forms pane on the left-hand side of VSP’s main screen. You’ll see an “Assignment form” in the list that represents the assignment request you submitted online. Click the “Process Form” button.
5. You can optionally set up these forms to be [automatically processed](#) so that the assignments are made in real time as soon as the forms are submitted.

Manual: Hand pick the volunteers you want to serve and get notification of any potential conflicts

1. Open the saved schedule you created in step 2 of these instructions.
2. Click on one of the empty positions in a shift. Notice that the volunteer list on the right-hand side of the window shows the volunteers who are eligible and available to fill the selected position.
3. To fill the position with one of the volunteers in the list, double-click or drag-and-drop the volunteer whom you wish to assign.

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Preassignments: Set volunteers to repeat on a pattern

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

1. After manually placing a volunteer on the schedule, click the "Repeats" button.
2. Set the repeating pattern for the chosen volunteer.
3. Click "OK." The volunteer will now be placed in the rotating pattern on this schedule and all future schedules.

Auto-scheduler: Click a button and let VSP assign your volunteers based on their preferences and settings

1. Click the "Auto Schedule" button in the upper right corner of the schedule window.
2. The auto-scheduler will ensure that volunteers are not scheduled during any of their "Unavailable times," that each volunteer's shift preferences and preferred serving frequency settings are honored, and that each volunteer appears on the schedule regularly.

Repeat this assignment

Shift: Mon, Wed, Fri, 8 AM - 4 PM

Just on: Mon Tue Wed Thu Fri Sat Sun

☒ Every week

☐ Every other week (arrows adjust frequency)

☐ The first week of the month

☒ Every month of the year

☐ Only every other month (arrows adjust frequency)

☐ Starting , ☐ Ending

Cancel OK

Customizing VSP for your organization

Custom fields, available in the Standard edition, can be used to collect and track volunteer 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 volunteers can update these fields themselves online.

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

1. Go to the Volunteers pane and click “New Volunteer...”
2. In the new window, click the “Edit Custom Fields...” button.
3. Click the “Manage fields...” button.
4. Click the “Create New Field” button.
5. 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.
6. Click OK once you have added all the custom fields you wish to track.

Web Terminal settings allow you to further customize how volunteers 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:

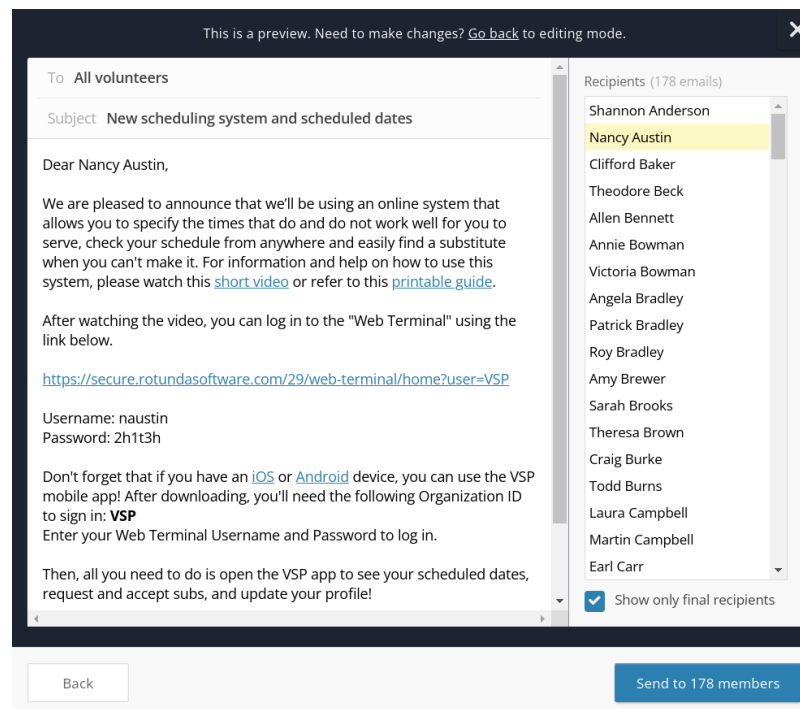
- Customize the text of automatic email reminders
- Turn on automatic text message (SMS) reminders
- Turn on automatic processing for web forms, so that requests that volunteers make through the Web Terminal are processed immediately rather than held for manual processing at a later time.
- Brand the Web Terminal with your organization’s logo
- Customize the profile information that volunteers 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.

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Giving volunteers online access to the Web Terminal

When you are ready, send your volunteers an email through the Announcements pane to let them know how to log in to the Web Terminal. (NOTE: You can set up Announcements but you cannot send them 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 volunteers 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 volunteer's name to see how the email will look when sent to each volunteer.



We also recommend that you post a link to your Web Terminal's home page on your organization's website so that your volunteers 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..." button in the top right corner of the Home tab.
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
- [The user manual](#), which helps explain the many different options found within the program

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](#).

