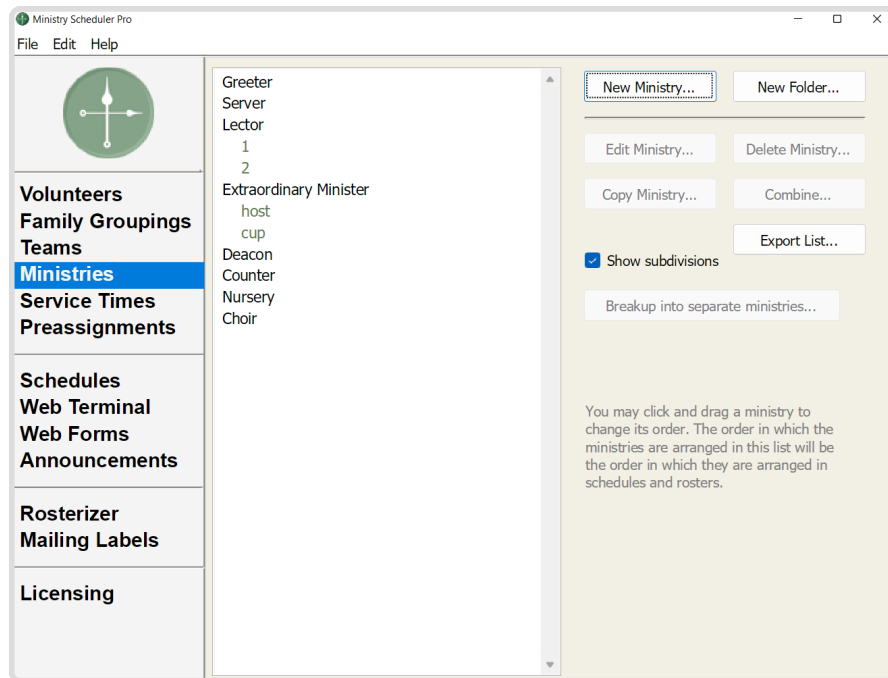# Ministry Scheduler Pro

Setup Guide

① Enter your ministries

Ministry refers to any task performed at a service or event. You can specify how many people from each ministry should be scheduled for each of your services or events.

[Watch this video](#) to learn how to define ministries and configure their settings.

1. Click on the Ministries pane.
2. Click the "+" button and select "New ministry."
3. Name your ministry.

Skills and tasks

Subdivisions are used to distinguish between different positions within the same ministry by task or skill, such as scheduling the Extraordinary Ministers as host or cup. 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.

To learn more about labeling different positions in a ministry, [watch this video](#) or [read this article on when to use subdivisions](#).

Titles are another way to distinguish multiple types of volunteers within a single ministry, such as by gender or experience level. However, unlike subdivisions, each volunteer can have only one title in a ministry. To learn about titles, [watch this video](#).

2 Enter your services

Create a service for each of your weekly services. You can also create a service for any other event that needs to be scheduled, such as nursing home visits, child care shifts, or meal distribution.

[Watch this video](#) to learn more about weekly, monthly, and yearly services.

1. Click on the Service Times pane.
2. Click the "+" button and select "New weekly service."
3. Enter the day and time of service and how many volunteers you need from each ministry.

③ Enter your volunteers

Volunteer refers to any person who will be scheduled in any of your ministries. There are three ways to go about entering your volunteers: manually, by importing from an existing file, or by synchronizing with your church management software.

Manually enter volunteers to customize their complete profile
<u>Watch this video</u> on manually entering volunteers and setting up their profiles.

1. Click the "+" button on the right side of the Volunteers pane.

2. Add the volunteer name, email, qualified ministries, and any other information you want to track about that volunteer.

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

<u>Watch this video</u> to learn how to set up a spreadsheet and import your volunteers.

1. Go to File - Import Volunteers

2. Add the fields from the available fields to the fields to import in the order they appear on your spreadsheet

3. Optionally qualify everyone from the spreadsheet in a particular ministry

4. Click import and choose your spreadsheet

③ Enter your volunteers

Synchronize volunteers to extract information directly from your church management software. MSP synchronizes with most popular church management programs, including ACS, PDS, Servant Keeper, ParishSOFT®, and more. With the MSP Plus Edition, you can also use the MSP API to connect with any database.

Watch this video for a walkthrough of the full synchronization process.

Synchronize Volunteers

This feature allows one-click synchronization of volunteer data from most popular church management software (and easy importation from other ministry schedulers). Since this is the first time this feature has been used a few easy steps need to be taken to set it up. Afterwards updating your volunteer information from your church management software takes just one click.

The follow is a list of programs for which MSP supports one-click synchronization. Please select the software you use from the list and then click Continue.

Access ACS
Parish Data System (PDS)
ParishSOFT
Servant Keeper 6
Servant Keeper 7
Servant Keeper 8
Logos Management Software

Note: If your church management or old scheduling software is not in this list, you may provide us with a sample database file and we can determine if we can add one-click synchronization for your software. Contact us at support@rotundasoftware.com for assistance.

Cancel   Continue >>

1. From the File menu, choose "Synchronize volunteers with..."

2. Follow the steps to locate and sync your database.

💡 **TIP**

Recommended settings

Service time preferences in the volunteer profile allow the auto-scheduler to prioritize the service preferences in the order you added to this list. If you do not check the "Schedule only at these times" box, MSP may schedule the volunteer at other services 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.

(4) Make a schedule

Once you have configured MSP with your ministries, service times, and volunteers, you are ready to create an empty schedule. It is most common to create schedules on a monthly or quarterly basis.

Watch this video for an overview of how to create and fill a schedule.

1. Click on the Schedules pane
2. Enter a start and end date for your schedule
3. Click the "Create" button

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

- **Manual**: Handpick the volunteers you want to serve and get notification of any potential conflicts

- **Preassignments**: Set volunteers to repeat on a pattern

- **Teams**: Group individuals in a ministry who should always serve together, and then set a pattern or let the auto-scheduler place them

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

Scheduling reports

Once your schedule has been filled, MSP's distribution reports give you a bigger picture of who's been scheduled, how often, and in which ministries.

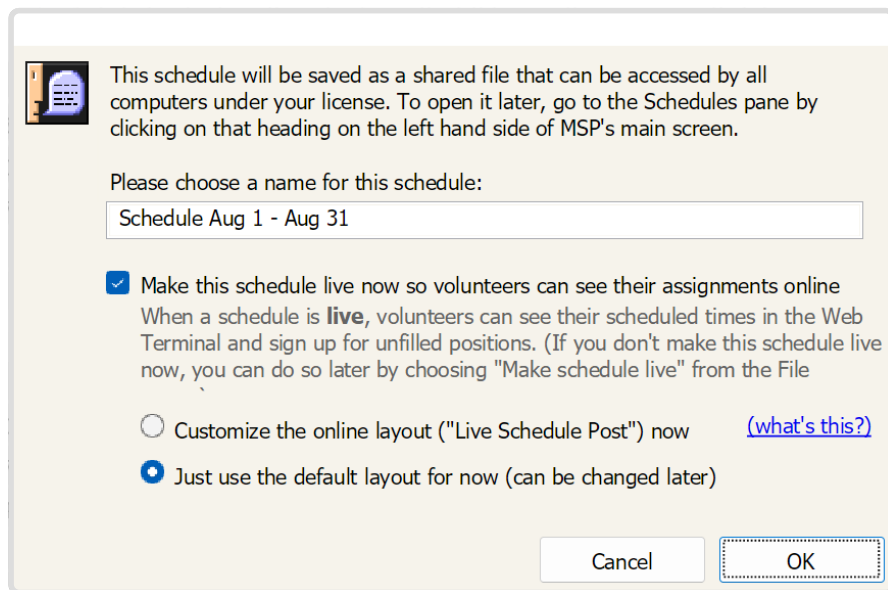Watch this video for an overview of how to use scheduling reports to ensure fair distribution.

To quickly see how many times each volunteer has been scheduled in each ministry, choose "View Ministry Distribution..." from the Reports menu.

⑤ Save and export

Once you have configured MSP with your ministries, service times, and volunteers, you are ready to create an empty schedule. It is most common to create schedules on a monthly or quarterly basis.

[Watch this video](#) for an overview of how to create and fill a schedule.

Post the schedule online via the Web Terminal:

1. Choose "Save" from the File menu to make the schedule live so that volunteers can see it on the Web Terminal, and create a **Live Schedule Post** to choose the layout your volunteers see in the Full Schedules tab.

To export your schedule to print:

1. Choose "Export" from the File menu.
2. Select your format and save it to your computer.

6 Set up the Web Terminal

Use the Web Terminal Checklist to set up and customize the Web Terminal.

1. Go to the Web Terminal pane
2. Click on the Web Terminal Settings button

7 Onboard volunteers

Use the Announcements pane to send an email introducing MSP and optionally invite volunteers to attend a training night.

1. Go to the Announcements pane and load one of the following Preconfigured Templates:

   - **Intro Email**: Update Request: this template is best used if you have not yet completed a schedule and wish to collect availability before creating and posting one online
   - **Intro Email**: First Schedule: this template is best used if you have just created and posted a completed schedule online

2. Make any manual edits to the template
3. Preview the email before sending it by clicking the Preview button
4. Send the email to all your volunteers

If necessary, grant Leaders access and invite them to get familiar with their online privileges.

✅ Congratulations! You have completed the setup of MSP.

For additional assistance, visit our Help Center. There you will find:

- A map of the MSP scheduling cycle with links to resources in each step of the process.
- Video tutorials on specific features, such as enrollment forms, text messaging and email announcements
- Step-by-step instructions for many common questions and setups

Need additional help?

Contact support by sending in your data files (Help - Send Data Files to Tech Support) or call us at 888-622-0949.

Ministry Scheduler Pro
Effective Ministry Scheduling