# Scheduler
Training Manual

Introduction to Scheduler Module

The Scheduler module in Shepherd's Staff allows you to schedule your church's events. This will keep your calender organized and minimize conflicts involving multiple events at one time.
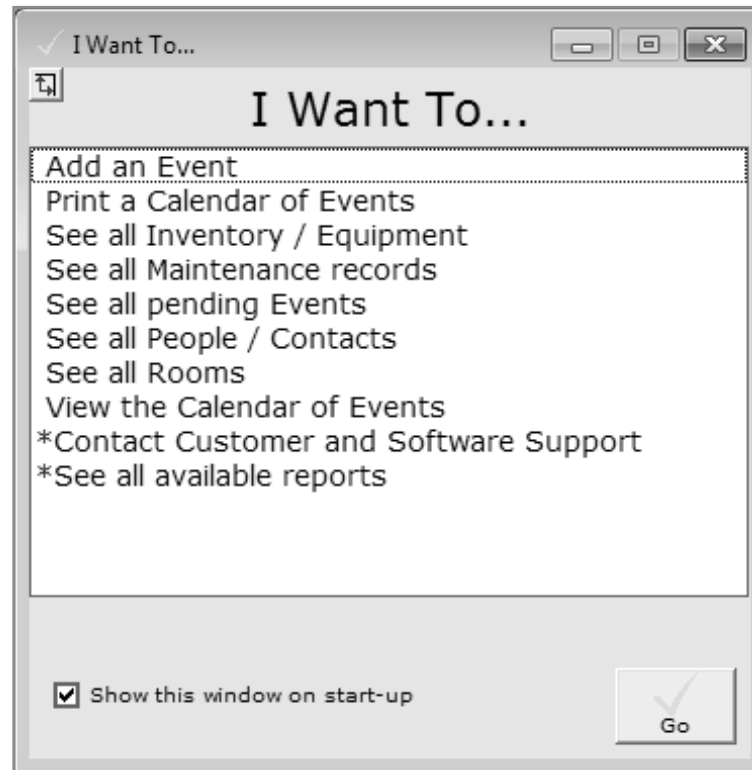
Introduction to Scheduler Module

The Scheduler module allows you to maintain records of your church's schedules and non-financial assets. Common tasks include adding events, checking out keys, loaning equipment, and updating ministry routes.

1. Events
2. Add an Event
3. People / Contacts
4. Inventory / Equipment
5. Rooms
6. Loaned-Out Inventory
7. Maintenance Records
8. Ministry Routes
9. Church Keys
10. Reports
11. To Do...
12. Calendar of Events
13. I Want To . . .
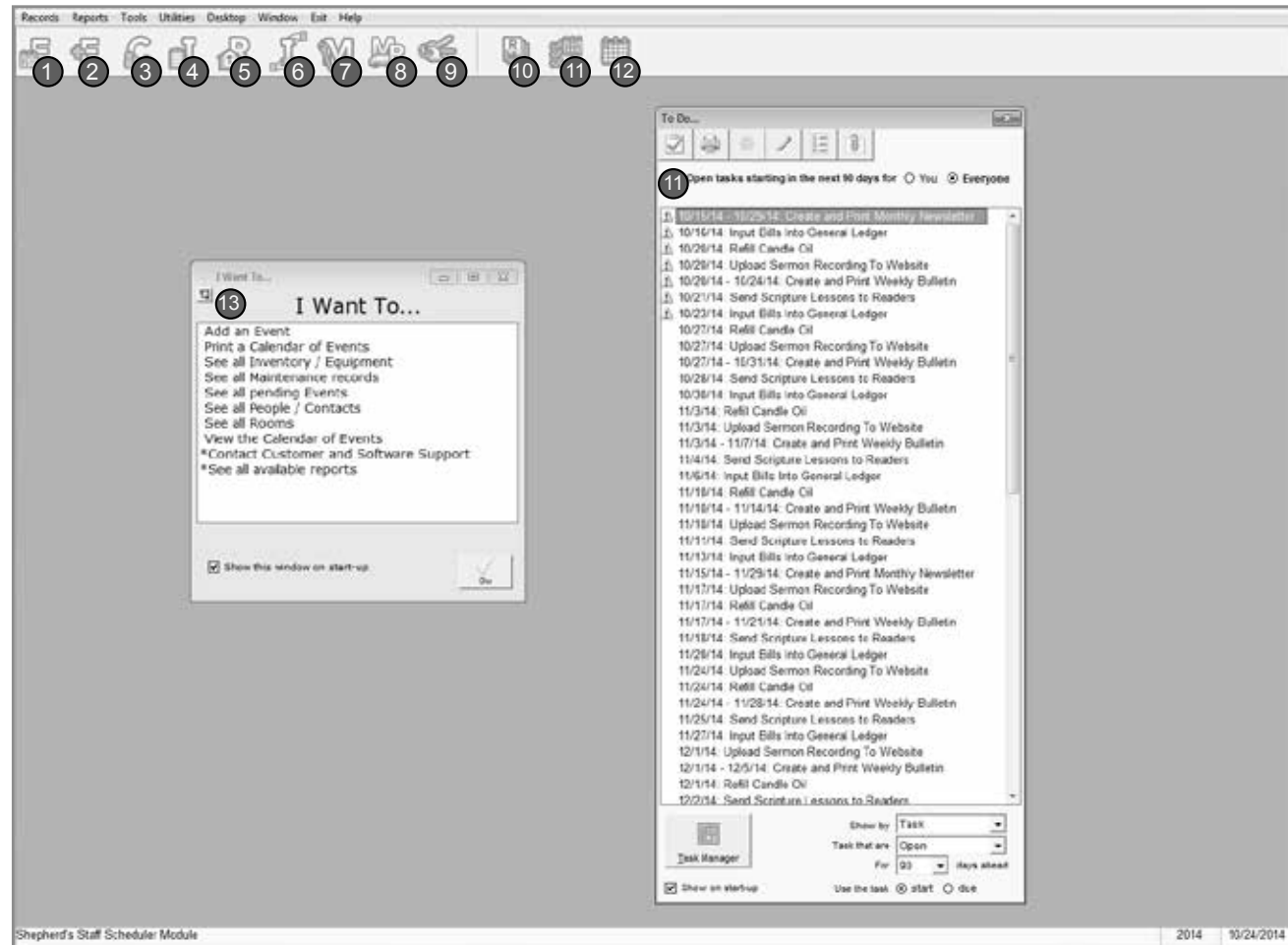
"I Want To . . . " Screen

This window is designed to be a quick shortcut to some of the more popular tasks within the module you are currently in. If you would like to turn off the "I Want To . . . " Screen, you can do so by clicking Desktop on the file menu and making sure "Show the 'I Want To' helper on start up" box is unchecked.

I Want To...

I Want To...

Add an Event
Print a Calendar of Events
See all Inventory / Equipment
See all Maintenance records
See all pending Events
See all People / Contacts
See all Rooms
View the Calendar of Events
*Contact Customer and Software Support
*See all available reports

☑ Show this window on start-up

Go

Customizing the Desktop

You can customize each of the modules by using the Desktop feature. Each user can customize his or her own desktop.

For example, if the first window you always open in Membership is the Households Grid, you can have the Membership module remember this and open the Households Grid automatically.

To do this, check "Show Households Grid on start-up."

Note: Multiple options may be selected. You can select all six options or any variation of the six options.

1. This feature can be accessed by clicking on Desktop from the toolbar.

2. From here, you can choose which windows you'd like to have open automatically when that module opens, saving you time.
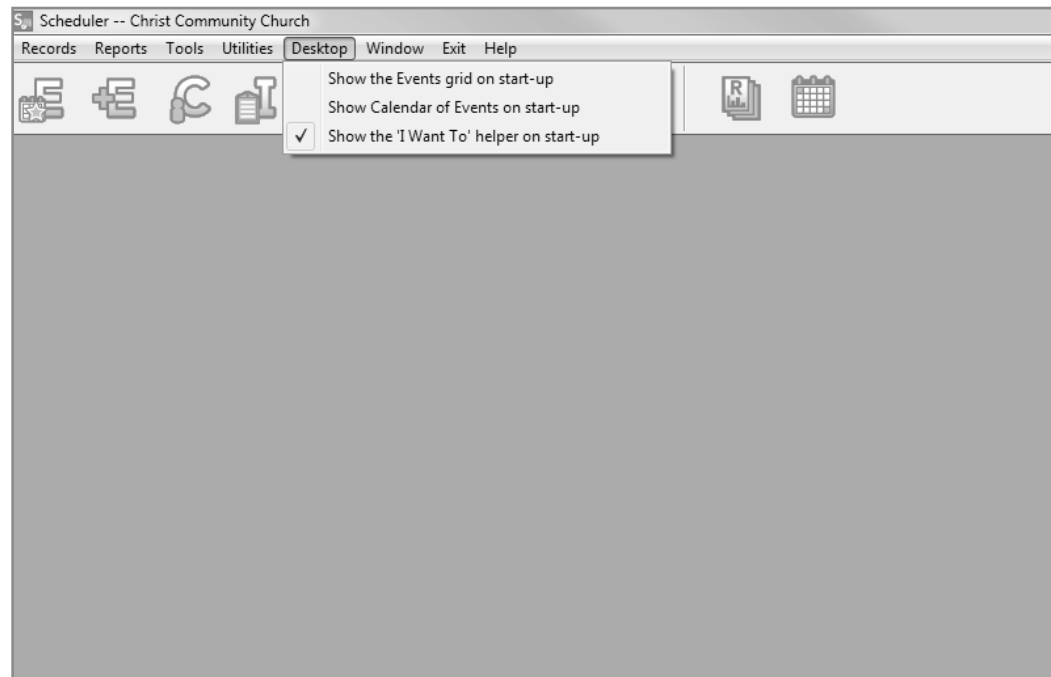
Database Conventions

A Shepherd's Staff database is built from MS Access. Data is entered into three different types of fields: option (drop lists), text and date. Knowing how to use each type of field is valuable in becoming more familiar with Shepherd's Staff.

» **Text Fields**—These fields contain only the data that you type into them. Some examples of these fields would be Spouse's Name, Address Line 1 and 2, and Email.

1. To add or delete: Simply type in or delete/backspace out.

» **Option Fields**—These fields deploy a dropdown box which gives you options to choose from. Examples of option fields are Marital Status, Ministry Group, and Received By, to name a few.

1. To add an item to an option field: Type in the item and hit TAB.

2. To delete an item: Hit drop arrow with mouse, scroll with arrow buttons on keyboard to desired item, and hit DELETE on keyboard.

3. To remove item from record but not delete from list: hit BACKSPACE instead of DELETE.

» **Date Fields**—These fields only hold a date. Examples of these fields would be Birthdate, Baptized Date, and Wedding Date.

1. To add or delete: You can type in a date or delete a date similar to a text field. You can also click the calendar icon to the right, and that can be used to select a date from a calendar.

Note: Option, Text or Date fields that have blue-colored font are required to be filled out.

Using the Keyboard—The majority of functions can be accessed without using a mouse. Within Shepherd's Staff, each word that represents a function has an underlined letter (for example, Records).

1. Use the ALT button plus (+) the letter underlined, for example ALT+R, to access Records.

2. To navigate within Shepherd's Staff after using an ALT command, use TAB to go forward, SHIFT (+) TAB to go back. The directional buttons (left, right, up, down) can be used to navigate as well. ENTER is used for OK.

3. The Escape button (ESC) will always close an open window.

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Contacts

The contacts in Scheduler are the people involved with the events. These could be everyone from the person you talk to set up the event to the people that are on a ministry route.

This section will take you through setting up Contacts.

Contacts

The first place to start in the Scheduler module is adding contacts. The reason we add them first is because they are used for Room Assignments, Events Assignments, Loans, and even Maintenance. Therefore, you will want to have them in first so they are there when we create those other records.

Any person or business associated with the Scheduler can be entered as a Contact. These contacts are not required to be in the Membership module but if they are you can simply import their information directly into Scheduler.

Note: Contacts from Membership don't automatically update information when it's changed in Membership. You must use the utility "Update from Membership" to update them.

These contacts can be added from the "Contacts" grid.

1. Access the Contacts grid by going to "Records" in the file menu and choosing "Contacts." You can also click the "C" on the toolbar.

2. To add a Contact, click the Add button.

3. If the Contact is in the Membership module, click on the M and select his or her name from the list. Contacts brought over using the Membership icon will automatically carry over their address, phone number, age, etc.

4. If the Contact is NOT in Membership module, manually fill in the information in the fields.

5. The Additional Information tab allows 9 different fields to be renamed and used for any purpose. See the page called "Renaming Field Names" in the System Administration section for more information.

6. Once the record is complete, click OK to create the contact.

Name	Type	E-mail	Phone 1	Phone 2	Address 1
Aanenson, Linda		Brian.aanenson@dial	763-767-5551		10147 Hanson E
Adams, Kathy			314-526-1952		15 North Ave
Adams, Kristen		kristenadams@yahoo.cc	314-526-1952		15 North Ave
Albers, Jennifer Lynn			763-767-3100		10645 DRAKE S
Alvarez, Corine G			763-754-3847		2613 107th Lane
Banks, Jessica (Jessi)					1115 Oakleaf Co
Bob Mechanic					54 Route 66
Carr, Alexis		revrdcarr@juno.com	734-542-3400		15431 Huff
Edwards, William (Bill)		bedwards@aol com	314-268-1000	Work:	100 Main St
Hammer, Bob					28582 Bay Shon
Harden, Robert			248-478-0425		24512 Olde Orch
Parsons, Gary			636-450-1190		142 N 43rd St
Russian, Bernice Caroline			734-737-0267		6821 Bostonhill I

Close   Add   Edit   Delete   Find   Sort   Label   Preview   13

Contacts (. . . continued)

Once you have your contacts entered, you will be able to:

» Print a list of the contacts.

» Create a mailing label for a contact.

» Export your contacts into a spreadsheet.

To print a list of contacts:

1. From the contacts grid, click the preview button to print the list.

2. If you want to print specific people, use the Find button to filter the grid prior to printing.

To create a mailing label for a contact:

1. On the contacts grid, highlight the contact you want a label for.

2. Click the label button.

To export your contacts to a spreadsheet:

1. Also on the contacts grid, click the "Export to Spreadsheet" button.

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Inventory

The Inventory grid allows you to enter records for the items your church owns. This can include everything from a TV and DVD player to the church bus.

This section will show you how to enter these records and the report you can run for them.

Inventory

The next step for Scheduler is adding Inventory. The reason for this is, as with Contacts, other records such as Rooms and Events use this inventory so it needs to be present before adding them.

Inventory records can contain information such as quantity, purchase date, value, etc. These records can then be attached to a Room or Event and even loaned out to a contact. Whenever this happens, Shepherd's Staff will check for any inventory conflicts, ensuring that you have enough of that item for all events or people.

Note: The Out of Service check box is for items that are either in need of repair and therefore not able to use or items that have been sent out for repair and not currently on the property.

1. Access the Inventory grid by going to "Records" in the file menu and choosing "Inventory." You can also access this grid by clicking the first I in the toolbar.

2. To add Inventory, click the Add button.

3. Enter the name of the Inventory item (required) and Total Quantity.

4. Enter in the type of Inventory. Keep in mind that the options in the list are what you want to enter. It's recommended you keep this list general like "Event Set Up" or "Audio/Visual."

5. If this Inventory Item is a vehicle, make sure you check the box stating that and fill in the information on the Vehicle tab.

6. Fill out the Details tab which contains detailed information on the inventory item.

7. If you wish to add a photo to this record, click the photo icon in the upper right corner.

8. Click OK to save the Inventory record.

Inventory Report

Once you have your inventory entered in the database, you can use this report to print those items out. It also has a handy blank form for writing down items that you want to enter into the database. The Inventory Report contains the following formats:

» **Inventory List (by Room)**—Print a check list of items making it easy to conduct an inventory check.

» **Inventory Valuation**—Plan purchasing/re-ordering of items or show a record of goods in the event of a loss or insurance claim.

» **Blank Form**—Prepare a list of items to enter into your database.

1. You can find this report by going to "Reports" and selecting "Inventory."

2. Choose the format for your report from the dropdown list.

3. Choose to show in service items, out of service items, or both. "Out of service" items will have that box checked on their inventory record.

4. You can filter which inventory items you want to see based on the options under the "Report for" area. Not selecting any of these will print all inventory records.

5. Under the "Include" section you can pick which fields you want to see from the inventory records.

6. Once you have the options you want, click Preview to view the report or click Print to send the report directly to the printer.

Inventory Loaned Out

If a contact needs to borrow an inventory item, you can enter that loan into the "Inventory Loaned Out" grid. These records allow you to record the item and contact as well as the relevant dates and reason for use.

These loan records will also show on the inventory item's record under the On Loan tab.

When Loans are past due, you will be prompted when you first enter the Scheduler module. On the grid, unreturned loan records will be white and returned loan records will show light blue.

1. Access the "Inventory Loaned Out" grid by going to Records in the file menu and selecting "Equipment Loaned Out." You can also click the second "I" on the toolbar.

2. To Add a Loan, click the Add button.

3. Pick the contact's name from the dropdown list. If the person is not in the list, you will need to add them as a contact.

4. Select the item the contact is borrowing along with the amount.

5. Fill in the Loaned Out and To Be Returned Dates.

6. Location and Notes are option fields for any additional information you want to keep.

7. Click OK to save the record.

8. Once the item is returned, you can edit the loan record and enter in the Date Returned.