

Current Scheduler

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

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Introduction to Scheduler

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Introduction to Scheduler

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 maintaining inventory.

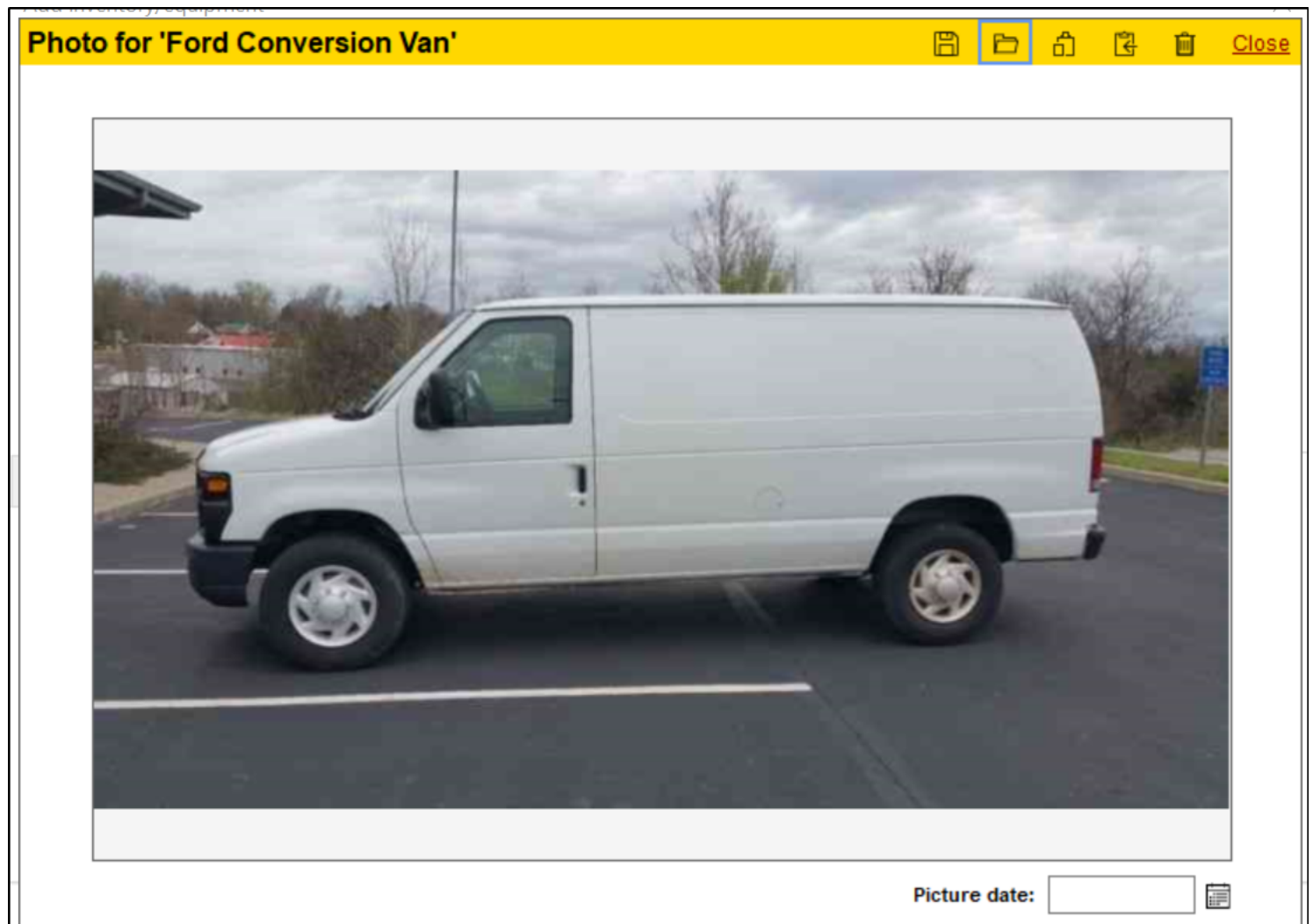
The screenshot displays the Scheduler application window. At the top, there are navigation tabs for Events, Inventory, Routes, Reports, and Tools / Settings. The main area features a search bar and a table of events. The table has columns for Event, Type, Date, Begin, End, and Rooms. The events listed include Bible studies, worship services, and youth groups. A sidebar on the right contains sections for My actions, My views, and My reports. At the bottom, there is a toolbar with icons for Add, Edit, Copy, Delete, Repeat, Change, Export, Print, and Save, along with a page number 7277.

Event	Type	Date	Begin	End	Rooms
Tuesday Morning Bible Study	Education	6/16/2020	8:00 AM	9:00 AM	1
Women's Bible Study	Education	6/17/2020	7:00 PM	8:30 PM	1
Men's Bible Study	Education	6/18/2020	6:00 AM	7:00 AM	1
Friday Lunch Group	Education	6/19/2020	3:30 PM	4:30 PM	1
Saturday Worship	Worship	6/20/2020	5:30 PM	6:30 PM	1
Junior High Youth Bible Study	Education	6/20/2020	6:00 PM	7:30 PM	1
Traditional Worship	Worship	6/21/2020	8:00 AM	9:00 AM	1
Contemporary Worship	Worship	6/21/2020	11:00 AM	12:00 PM	1
Sunday School	Education	6/21/2020	9:30 AM	10:30 AM	1
Adult Bible Study	Education	6/21/2020	9:30 AM	10:30 AM	1
Young Adult Bible Study	Education	6/21/2020	5:00 PM	6:30 PM	1
Senior High Youth Bible Study	Education	6/21/2020	6:00 PM	7:00 PM	1
Adult Bible Study	Education	6/22/2020	10:00 AM	11:00 AM	1
Tuesday Morning Bible Study	Education	6/23/2020	8:00 AM	9:00 AM	1

Add/Edit a Photo in Scheduler

Throughout the Scheduler module, you may want to add a photo of an inventory item, a room, or even a contact. The process for adding these photo remains the same throughout the Scheduler module, and can be repeated for inventory items, rooms and contacts.

1. When adding or editing a record, if a photo can be added to it, there will be a blank spot where a photo can go, and next to it, a camera button. Click the camera button to open the window where you can add a photo.
2. In the window that appears, there are a few different ways you can add a photo. In the top left corner of the page, you'll see an icon that looks like an open folder. Click this icon to search for a photo on your computer. Once you've found the photo, double click the photo, and it will be added.
3. If you've copied a photo to the windows clipboard, you can also click the button that looks like a clipboard with a square next to it to paste that photo into this record.
4. Click the clipboard with an arrow on it to copy the photo you already have saved in this window.
5. Click the trash can icon to delete the photo from this record
6. At the bottom right corner of the window, you can fill in the date the photo was taken on in the "Picture Date" field
7. Click the Save icon at the top of the window to save the photo to the record.



Contacts

The contacts in Scheduler are the people involved with the events. These could be everyone from the person you talk to to set up the event to the people that are on a ministry route. This section will take you through setting up Contacts, the first step in setting up your Scheduler module.

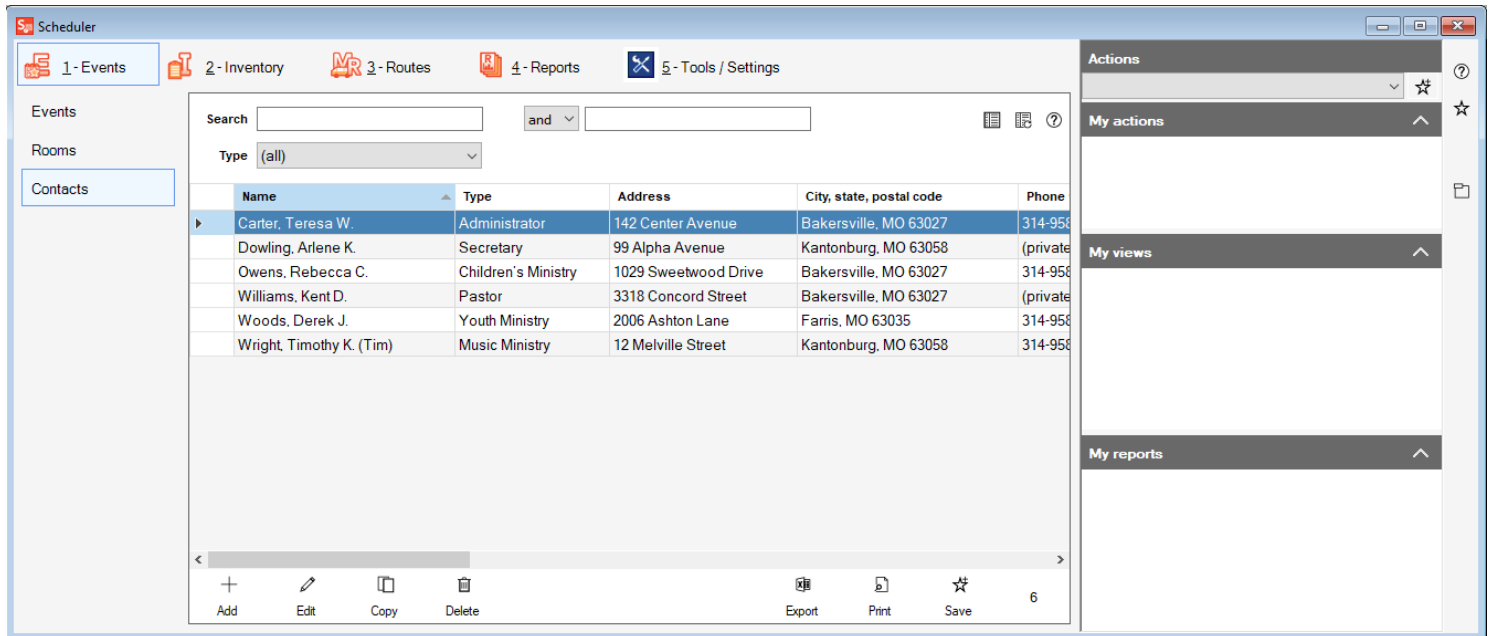
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Introduction to Contacts

Contacts are people who are responsible for the different aspects of the Scheduler module, such as rooms, inventory, keys, events, vehicles and ministry routes, and contacts link into almost every aspect of the Scheduler module. A contact may or may not be a member of your church.

The first place to start in the Scheduler module is adding contacts. The reason we add contacts first is because they are used in Rooms, Events, Loans, Ministry Routes and even Maintenance. Therefore, you will want to add them in first so you have them when you create these 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. This also means that whenever their information is updated in the Membership module, these updates will be reflected in the Scheduler module, such as an update in their phone number.



The screenshot shows the Scheduler application interface. The top navigation bar includes: 1 - Events, 2 - Inventory, 3 - Routes, 4 - Reports, and 5 - Tools / Settings. The left sidebar has buttons for Events, Rooms, and Contacts. The main area displays a search bar, a dropdown for Type (all), and a table of contacts. The table has columns for Name, Type, Address, City, state, postal code, and Phone. The bottom of the interface has a toolbar with icons for Add, Edit, Copy, Delete, Export, Print, and Save. On the right side, there are panels for Actions, My actions, My views, and My reports.

Name	Type	Address	City, state, postal code	Phone
Carter, Teresa W.	Administrator	142 Center Avenue	Bakersville, MO 63027	314-958
Dowling, Arlene K.	Secretary	99 Alpha Avenue	Kantonburg, MO 63058	(private
Owens, Rebecca C.	Children's Ministry	1029 Sweetwood Drive	Bakersville, MO 63027	314-958
Williams, Kent D.	Pastor	3318 Concord Street	Bakersville, MO 63027	(private
Woods, Derek J.	Youth Ministry	2006 Ashton Lane	Farris, MO 63035	314-958
Wright, Timothy K. (Tim)	Music Ministry	12 Melville Street	Kantonburg, MO 63058	314-958

Add/Edit Contact

Contacts will need to be added in the Scheduler module, as they link in to many different types of records with the Scheduler module. Below, we'll walk through the two different methods you can add in a contact to the Scheduler module. We'll also discuss how to edit a Contact record.

To add a contact from an existing Person record in the Membership Module:

1. In the Contacts view, click the "Add" button at the bottom of the view.
2. Find the person you want to make a contact from in the list that appears. This list will show everyone in your Membership module who isn't already listed as a contact. Once you have found the person, click on them to highlight them.
3. Click the "Link selected person" button.
4. In the window that appears, you will see the information that has been brought over from the Membership module, including a photo, if one has been added.
5. Select what type of contact this person is in the "Type of contact" field.
6. If you want this person to be an available contact for Ministry Routes, check the "Show in ministry routes" box. If they are to only be a Ministry Route contact, check the "ONLY show in ministry routes"
7. All information in gray fields has been populated from the Membership module, and cannot be updated in Scheduler.
8. Click Save when finished.

To add a contact who is not part of your Membership module:

1. In the Contacts view, click the "Add" button at the bottom of the view.
2. At the next window, click the "Don't link a person from membership" box.
3. The only required field is the Name field, which is the name of your contact.
4. Select what type of contact this person is in the "Type of contact" field.
5. If you want this person to be an available contact for Ministry Routes, check the "Show in ministry routes" box. If they are to only be a Ministry Route contact, check the "ONLY show in ministry routes"
6. Fill in the person's contact information in the fields of the Contact tab.

7. In the Personal tab, you can fill in the person's Birth date, Sunday School grade, Grade, Parent/Guardian name(s) and how to contact. You can also check the box to say if this person is a member and if they have a commercial driver's license.
8. In the Other field, you can fill in any person custom fields you may have added in the Membership module.
9. If the person has a photo you would like to upload, you can do so by clicking the camera button. To add notes, you can click the thumbtack button.
10. Click Save when finished.

To edit an existing contact record:

1. In the Contacts view, find the Contact record you need to update, click on it to highlight it, and then click "Edit" at the bottom of the grid
2. This will open the contact record. Make any changes you need to make.
3. Click Save at the bottom right hand corner of the window to save your changes.

* Name

Type of contact

Show in my calendar

ONLY show this contact

Company

Address

City, State/Province

Choose a person from membership to link... Cancel

- Abbott, David L. (Dave)
- Abbott, Jacob P.
- Abbott, Lacey M.
- Abbott, Susanne A. (Sue)
- Alexander, David
- Alexander, Jeffrey D.
- Alexander, Natalie D.
- Alexander, Shirley J.
- Barber, Diedre W.
- Baxter, Allison (Allie)
- Baxter, Sally L.
- Beaubien, Ellen
- Beaubien, James T.
- Belton, Darin P.
- Belton, Kira L.
- Belton, Lena H.
- Belton, Troy J.
- Benedict, Timothy R. (Tim)

Don't link a person from membership

Link selected person

Save

Inventory

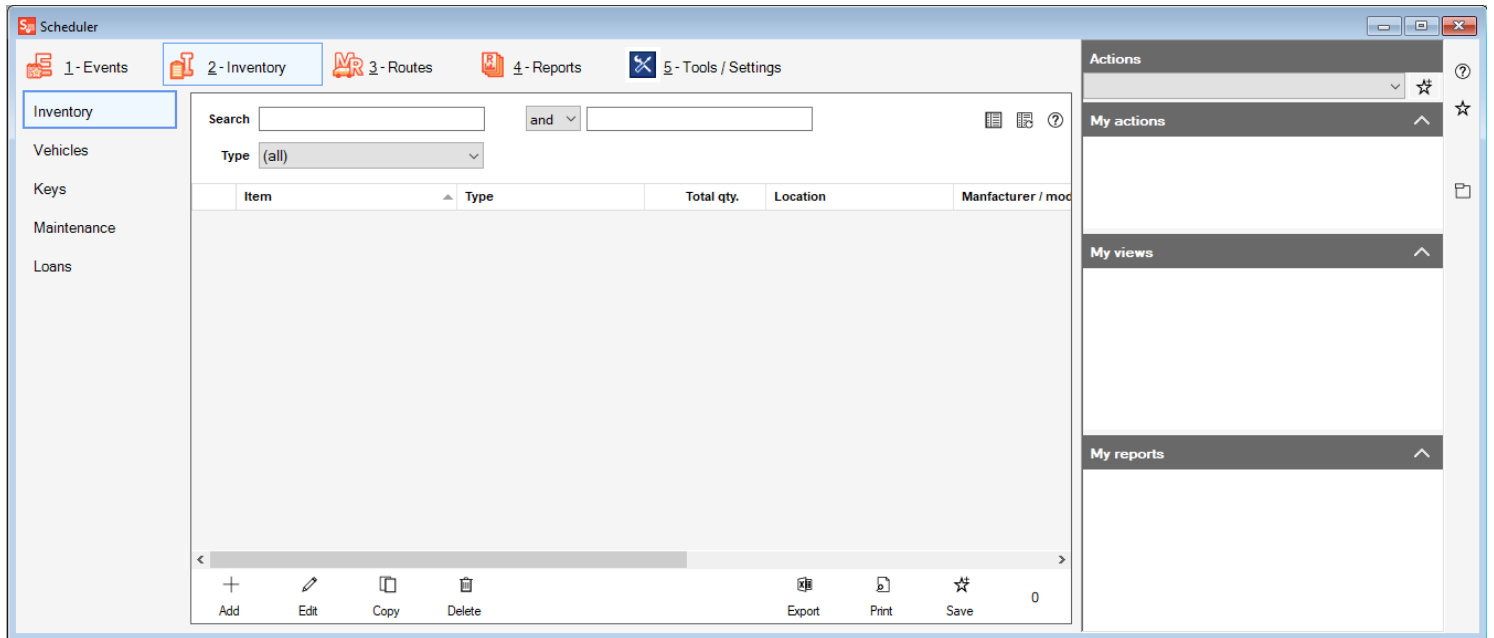
The Inventory section allows you to enter records for the items your church owns. This can include everything from a computer to the church bus. This section will show you how to enter these records.

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- ▶ [Add/Edit Vehicles](#)
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- ▶ [Introduction to Loans](#)
- ▶ [Add/Edit Loans](#)

Introduction to Inventory

Inventory records represent the items that may be used for events and within rooms. By maintaining inventory records, your church can keep stock of what you have on hand, what condition these items are in, how many of a particular item you have, and what the value of these items are.

Inventory can be associated with rooms and events. By referencing the item quantity, Shepherd's Staff can check to see if there is enough of a particular item on hand at a particular time to let you know if there will be conflicts. Typically, Inventory is the second section of the Scheduler module that should be populated, after Rooms.



Add/Edit Inventory

Adding inventory records is necessary for tracking how items at our church are used in different Rooms and Events. We'll walk through the steps below on how to create inventory records, or edit existing records.

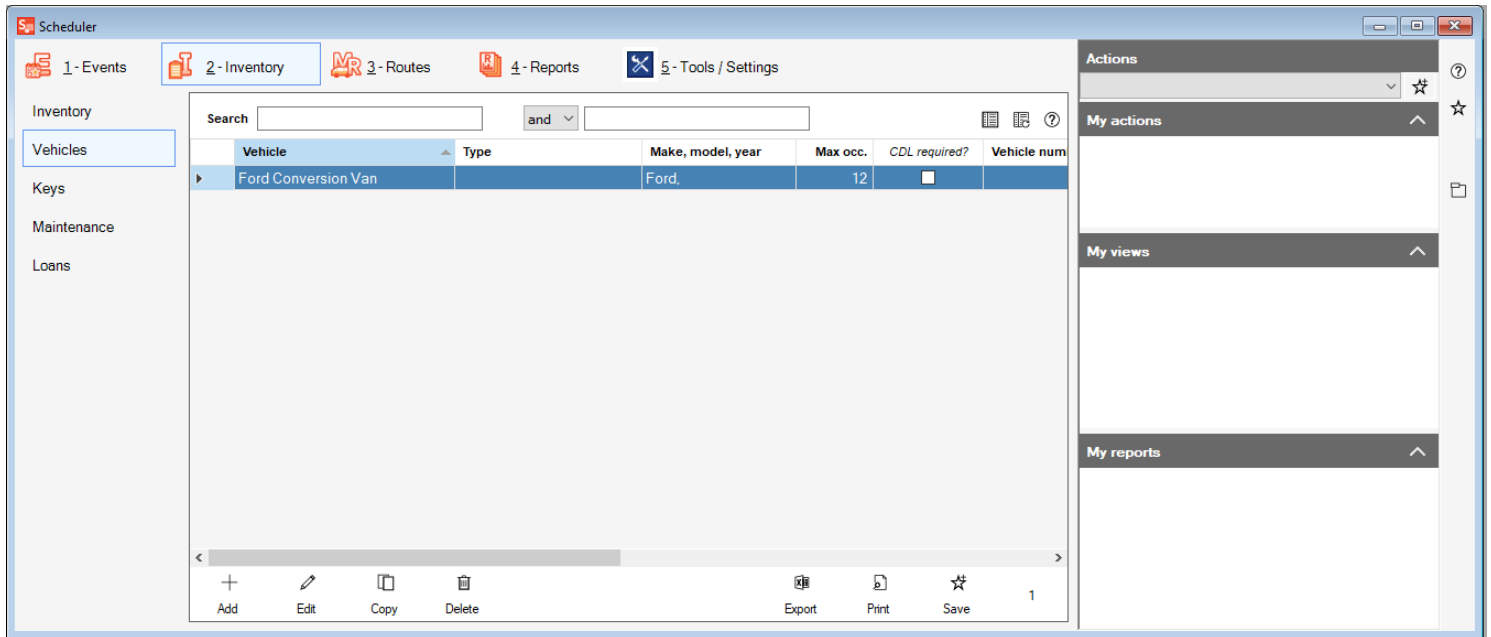
Note: The Out of Service check box is for items that are either in need of repair and therefore not able to use or items that have been sent out for repair and not currently on the property.

1. Access the Inventory view by clicking on the "Inventory" tab of the Scheduler module.
2. Click the Add button at the bottom of the Inventory view.
3. Enter the Name of the item in the "Name" field.
4. In the "Total quantity" field, fill in how many of this item the church has, in total.
5. In the Inventory/Equipment type field, fill in what type of item this, such as "Event Set-up" or "Audio/Visual"
6. In the Locations section, fill in where in the church you have this item stored at.
7. If you would like to add a photo of these item(s), click the camera icon to upload a photo. To add notes, click the thumbtack icon.
8. The Rooms and On Loan tab will show which rooms these item(s) are associated with, and the loan records associated with these item(s).
9. The Maintenance tab will show you the maintenance records for these item(s)
10. The Other details tab will let you enter additional information, such as Manufacturer and Model of the item(s), when the item(s) were acquired on, receipt or invoice number, serial or ID number, where the item was purchased/acquired from, and the valuation of the item.
11. When finished, click Save.

Introduction to Vehicles

Vehicles are special classification of Inventory. Because vehicles have a specific set of information that is specific to vehicles, there are special vehicle records which are separate from the rest of the inventory records.

Vehicles can be associated with Rooms and Loans, and they can have maintenance records added to them. Vehicles should be added to your Scheduler module alongside the rest of your Inventory.



Add/Edit Vehicles

Adding Vehicle Records allows you to track many important details about the vehicles your church owns. We'll walk through the steps needed to create these Vehicle records below, or edit an existing Vehicle record.

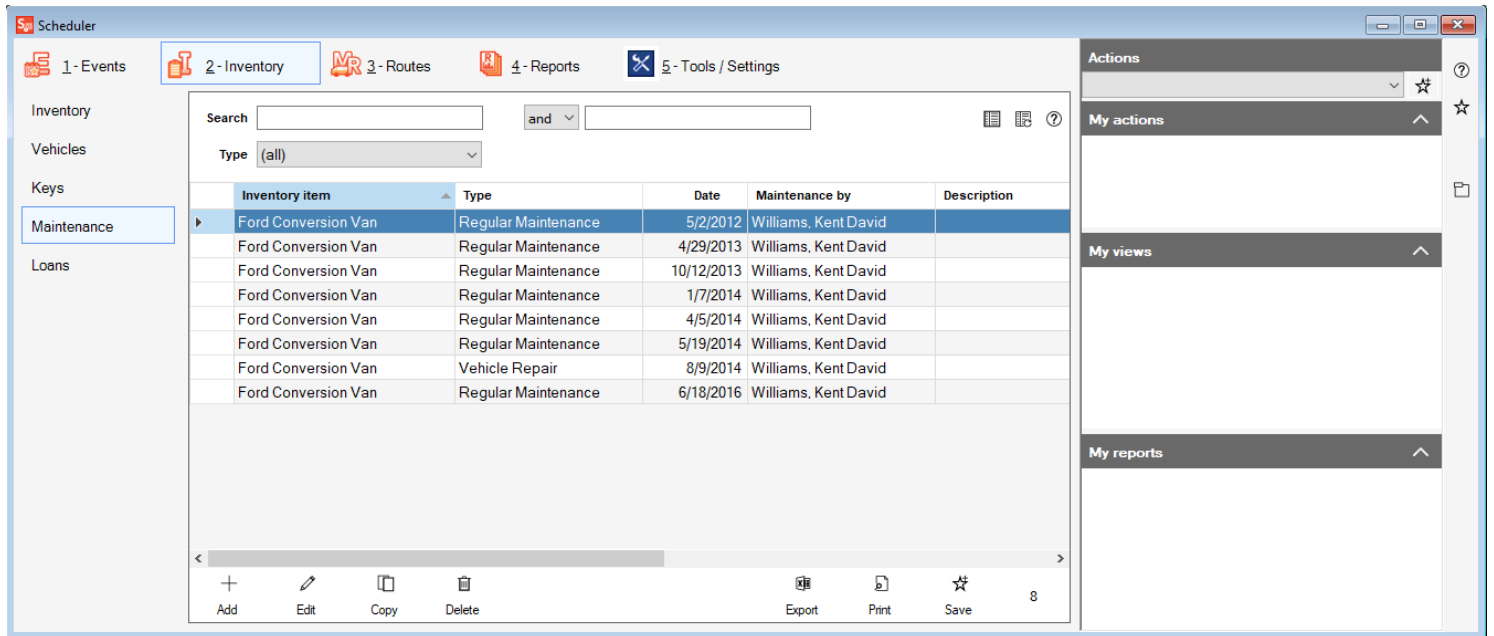
Note: The Out of Service check box is for vehicles that are either in need of repair and therefore not able to be used or vehicles that have been sent out for repair and not currently on the property.

1. Access the Vehicles view by clicking on the "Inventory" tab of the Scheduler module, and then click the "Vehicles" tab on the left side of the window
2. Click the Add button at the bottom of the Vehicles view at the bottom of the window, or highlight an existing vehicle record, and click "Edit" to update an existing vehicle record.
3. Enter the name of the vehicle in the "Name" field. This is the only required field to add a vehicle.
4. In the "Total quantity" field, fill in the number of vehicles that the church has of this type.
5. In the Inventory/Equipment type field, you can fill in what this vehicle is primarily used for, such as "Passenger" or "Cargo".
6. In the Locations field, you can enter the place where the vehicle is usually parked when not in use.
7. If you would like to add a photo of this vehicle, click the camera icon to upload a photo. To add notes, click the thumbtack icon.
8. The Rooms and On Loan tab will show which rooms this vehicle is associated with, and the loan records associated with this vehicle.
9. The Maintenance tab will let you see and add maintenance records for this vehicle.
10. The Vehicle info tab contains important information about the vehicle, such as Make, Model, Year, License Plate Number, Max occupancy, and insurance information. There's also checkboxes to indicate if a vehicle is wheelchair accessible or if a Commercial Drivers License is required to drive the vehicle.
11. The Other details tab contains additional information about the vehicle, such as when and where the vehicle was purchased, and the original and current value of the vehicle.
12. Click save at the bottom right corner of the window when finished to save the Vehicle record.

Introduction to Maintenance

With many different items and vehicles within your church, it is inevitable that, over time, these items and vehicles will need repairs, or regular service performed in order to keep these things in good working order.

From Audio/Visual equipment, to the Church Van, keeping up-to-date maintenance records is not only good stewardship, but it can also help your church mitigate potential liability issues.



The screenshot shows the 'Scheduler' application window with the 'Inventory' tab selected. The main area displays a table of maintenance records for 'Ford Conversion Van' items. The table has columns for 'Inventory item', 'Type', 'Date', 'Maintenance by', and 'Description'. The records show regular maintenance performed by Williams, Kent David from 2012 to 2016, and one vehicle repair record from 2014. A right-hand sidebar contains sections for 'Actions', 'My actions', 'My views', and 'My reports'. A bottom toolbar includes icons for Add, Edit, Copy, Delete, Export, Print, and Save, along with a page number '8'.

Inventory item	Type	Date	Maintenance by	Description
Ford Conversion Van	Regular Maintenance	5/2/2012	Williams, Kent David	
Ford Conversion Van	Regular Maintenance	4/29/2013	Williams, Kent David	
Ford Conversion Van	Regular Maintenance	10/12/2013	Williams, Kent David	
Ford Conversion Van	Regular Maintenance	1/7/2014	Williams, Kent David	
Ford Conversion Van	Regular Maintenance	4/5/2014	Williams, Kent David	
Ford Conversion Van	Regular Maintenance	5/19/2014	Williams, Kent David	
Ford Conversion Van	Vehicle Repair	8/9/2014	Williams, Kent David	
Ford Conversion Van	Regular Maintenance	6/18/2016	Williams, Kent David	

Add/Edit Maintenance

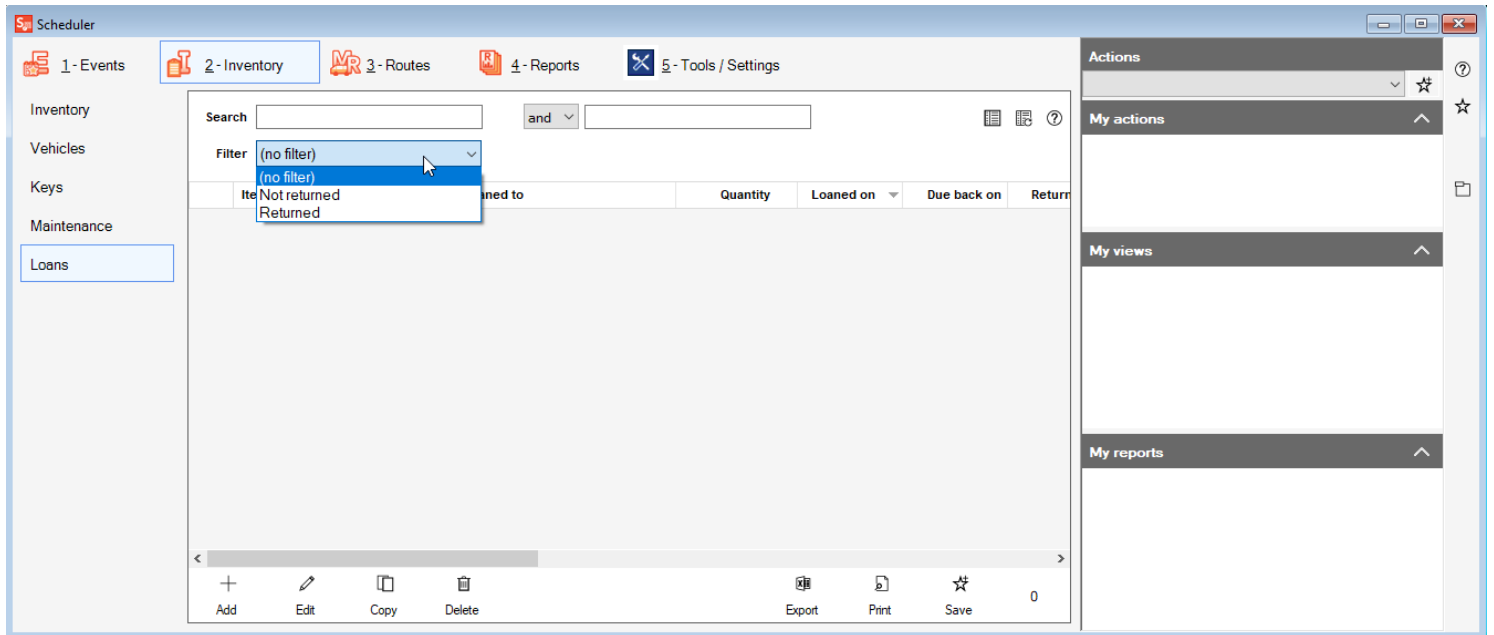
Whenever maintenance is performed on an item or vehicle at your church, a corresponding maintenance record should be created in Shepherd's Staff. We'll walk through the steps of adding a maintenance record below, or editing an existing maintenance record.

1. To access the Maintenance view, click on the Inventory tab at the top of the scheduler module, and then click the Maintenance tab at the left side of the window. (Maintenance records can also be added from within Inventory or Vehicle records directly)
2. Click the add button at the bottom of the view to start adding a Maintenance record, or click on the maintenance record you need to update and click "Edit" at the bottom of the grid to make changes to that record.
3. First, select what item of inventory or vehicle the maintenance is being performed on in the Inventory/equipment field. If you need to add a new piece of inventory, click the green plus button next to the field.
4. Fill in the date the maintenance was performed on in the Maintenance date field, and if this maintenance was performed on a vehicle, enter the mileage of the vehicle at the time of maintenance in the Mileage field.
5. In the "Maintenance performed by" field, you can select a contact, or if you need to add a new contact click the green plus sign located to the right of this field.
6. In the type of maintenance field, fill in a generalized description of what this maintenance was. For example, if this was an oil change on a vehicle, "Regular Maintenance" would be an appropriate way to fill in this field.
7. In the Invoice or receipt number, fill in the invoice or receipt number you received from the maintenance provider, and in the cost field, fill in how much the maintenance cost to complete, including parts and labor.
8. In the maintenance description/details field, this is where you would fill in more specific information about the maintenance performed. This is where you might say that the regular maintenance performed was an oil change, for example
9. Any additional notes on the maintenance you may want to fill in can be provided in the Notes field.
10. Click Save when finished to save any changes that you've made.

Introduction to Loans

On occasion, the church may find it needs to loan out items to members of the congregation or even other organizations or people within the community. In this situation you can enter this loan into Shepherd's Staff to keep track of the items that have been loaned out.

Loan records will also show up in the loans tab of an inventory record, so you can quickly see if a particular item has been loaned out, and also that item's loan history.



Add/Edit Loans

Whenever an item from your church's inventory is loaned out, a loan record should be created to keep track of who and where that item is located. Below, we'll walk through adding and editing loan records:

1. Click on the Inventory tab at the top of the Scheduler module, and then, click on the loans tab on the left side of the window to access the Loans view.
2. Click the Add button at the bottom of the window to create a new Loan record, or click on existing Loan record and click edit to update that record.
3. In the loan record, start by selecting the borrower's name from the Borrower's name field. This field contains a list of all the Contacts you have in the scheduler module. If you need to add a new contact, click the green plus sign button to the right of this field.
4. Next, select the item that is being borrowed in the "Item borrowed" field. This will contain all items in the inventory records, as well as all vehicle records. If you need to add an inventory record, click the green plus sign button to the right of this field.
5. Select the quantity of the item being borrowed in the "Quantity loaned" field, as well as the date that the item was loaned out in the "Date loaned out" field and the date the item is scheduled to be returned on in the "Date to be returned" field.
6. Once the item has been returned, you can fill in the "Date returned" field to "close out" the loan.
7. Fill in the location the item will be used in and the reason for the loan in the "Location of use/Reason for use" field. Any additional notes that may need to be recorded can be filled in under the "Notes" field.
8. Click "Save" when finished, to add the loan record.

Rooms and Keys

now that you have your contacts and inventory set up, you have enough information to create your room records. These records can be set up for any room for which you want to schedule events. This next section will show you how to set up these records, including keeping track of the keys for those rooms

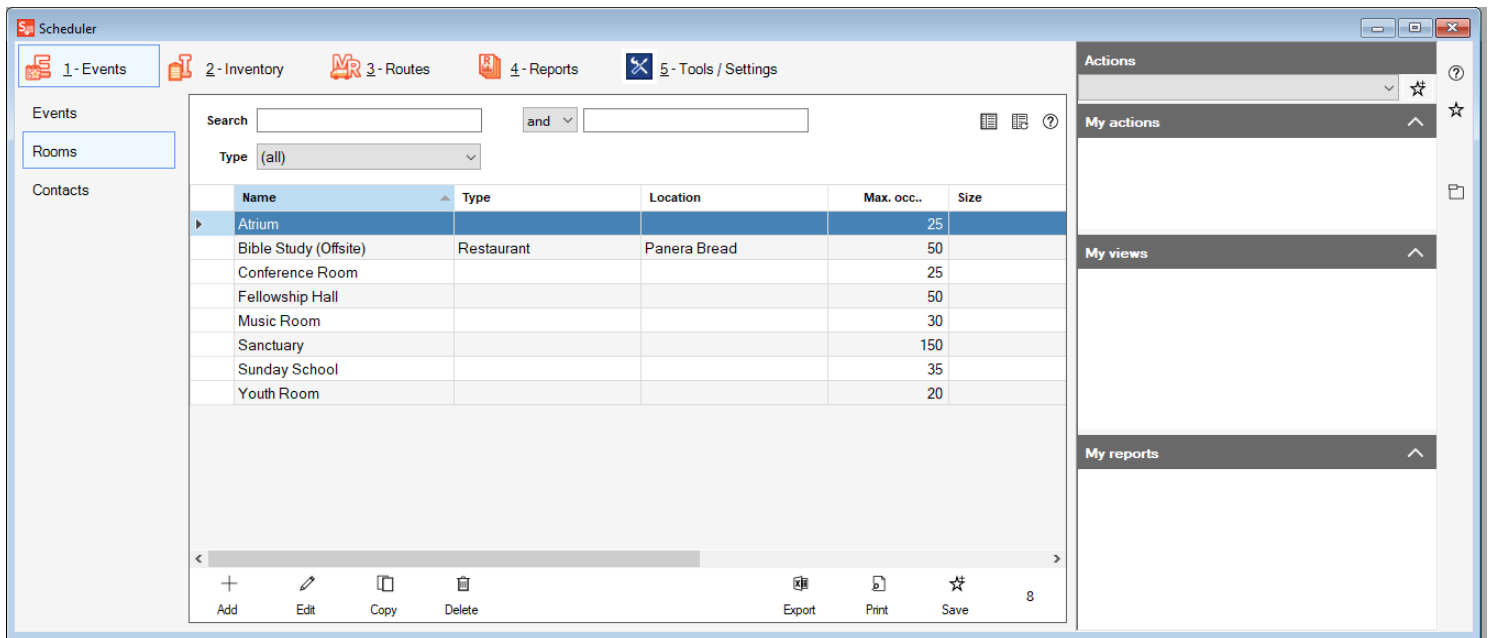
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Introduction to Rooms

In Shepherd's Staff, a Room represents an area or location of the church where an Event may be held (every Event must be in a Room.).

Using this definition, we can see that a "Room" does not have to be an enclosed space. A room can be anything from a church narthex to an outdoor playground or ballfield. You could even use a section of an interior room which is especially helpful if a church wants to schedule future maintenance.

All of these room records are contained within the Rooms view, where you can see all the rooms you have in your database.



Add/Edit Room

You will need to add in Rooms to place your events in. The steps below walk through the process of adding rooms to your database, or editing an existing room.

1. In the Scheduler module, under the Events view, click on the "Rooms" tab.
2. At the bottom of the Rooms grid, click the "Add" button, or if you need to edit an existing room, find the room you want to make changes to, click on it to highlight it, and click "Edit" at the bottom of the grid.
3. In the window that appears, the only required field is the "Name" field. This is the name of the room.
4. The Size field is a general term, such as "Large" or "Small" whereas the Max Occupancy field should be the number of people that can safely fit in the room.
5. Location is the general area that this Room can be found. So, for example, with a room in your church, you might fill in "Upstairs" or "South Side". Make sure to keep this non-specific to limit the number of options you may have in this field.
6. Type of Room should follow the same general idea as Location, a brief descriptor of what the room is used for such as "Classroom, Meeting, Office" and kept general to keep your list of options small.
7. Check the "Active" box to make the room active. Only active rooms can be assigned events.
8. To add a photo of the room, click the camera icon. This will let you upload a photo of the room.
9. To add notes on the room, click the thumbtack icon. This will let you add additional notes on your room.
10. Click Save to save the room. If you want to add contacts and inventory, they must be added to the database first. To add these items, see the articles on these topics.

Note: Adding Inventory does not include the quantity. The quantity must be entered manually.

Assign People / Contacts to This Room:

1. Click the person you would like to add to the room in the list of contacts.
2. Click the blue right arrow button to add that person to the list of Contacts assigned
3. If you want to remove a person from the list of contacts assigned, click their name in the Contacts assigned section, and click the blue left arrow button.

Assign Inventory / Equipment to This Room:

1. Click the item you would like to add to the room in the inventory list.
2. Click the blue right arrow button to add that item to the list of Inventory assigned
3. If you want to remove an item from the list of inventory assigned, click their name in the Inventory assigned section, and click the blue left arrow button.

Add room
— □ ×

*** Name**




Location

Type of room

Size

Max occupancy

Active

Contacts +

Carter, Teresa Wanda
 Dowling, Arlene Kimberly
 Owens, Rebecca Christine
 Williams, Kent David
 Woods, Derek Jamal
 Wright, Timothy K. (Tim)

→
←

Contacts assigned

Name	Type	Phone 1	Email	Note?

Inventory +

Ford Conversion Van (1)

→
←

Inventory assigned

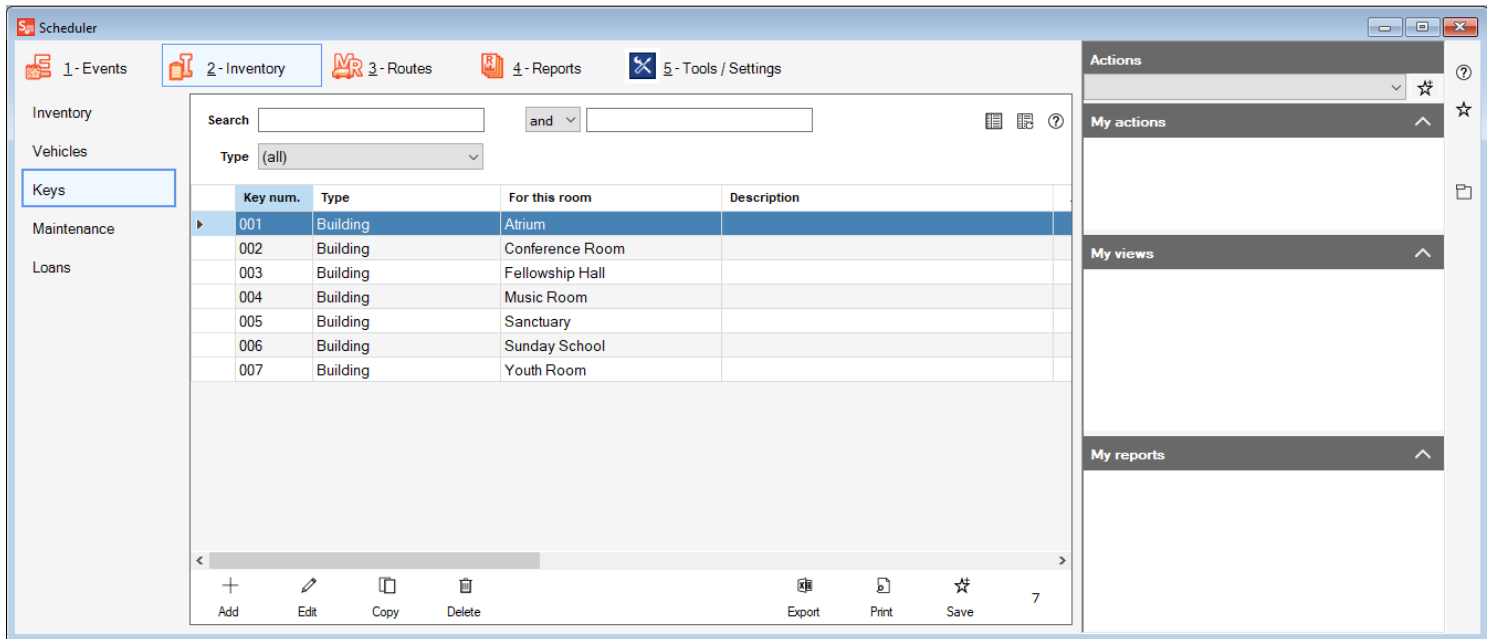
Name	Type	Quantity	Location	Note?

Save

Introduction to Keys

By their nature, churches often have many rooms, storage, and other keys which are entrusted to employees, volunteers, and other church leaders.

The Church Keys area of the Scheduler module allows churches to maintain a record of their keys, the associated room(s) which each key opens, and a record of which people have been assigned specific keys, as well as who has returned them to the office (signing out and returning keys).



Add/Edit Keys

You will need to add Key records for your church to keep track of who has which keys, and what rooms these keys go with. We will walk through the process of adding key record below, or editing an existing key record.

1. To access the Keys view, click on the Inventory tab at the top of the Scheduler module window, and click on the "Keys" tab on the left side of the window.
2. Click the "Add" button at the bottom of the view, or to edit an existing key record, click on the key record you need to make changes to and click "Edit" at the bottom of the grid.
3. Fill in the Key Number field, if needed.
4. In the Key category/type field, you can describe the usage of the key, such as if it is a building key, a key to a specific room, or maybe a key to a desk or safe.
5. In the "For this room" field, select what room this key goes to. If you need to add a new room, click the green plus sign button to the right of this field.
6. The key description may describe what the key looks like, or if it's not to the room specifically, but maybe a safe or desk within a room, you can say what item within the room it belongs to.
7. To add a picture of the key, click the camera icon, and you can attach a photo of the key to the key record. To add notes on the key, click the thumbtack icon.
8. If the key has been assigned to a person, check the "Assigned?" box. This will let you select a contact in the "Assigned to" field. If you need to add a contact, click the green plus sign to the right of the "Assigned to" field.
9. In the Date assigned, and Date returned field, fill in the date the key was assigned to the contact, and what date that contact returned the key. If this is key is reassigned, you will need to select a new contact and fill in these fields again, you may want to add the information on who had the key previously to the notes field.
10. Click Save at the bottom right of the window to save the Key record.

Events

Once you have your rooms set up, you are ready to start entering events. The events check for conflict with both room/time and inventory/contacts to make sure that everything is available for that event. This section will explain scheduling events, repeating events, and printing out reports or events including the calendar of events.

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Introduction to Events

Events are the heart of the Scheduler module. They allow us to track the things going on in the church and make sure that rooms, inventory, and contacts do not overlap without notifying you first.

An Event is defined as any gathering or usage of church facilities by one or more people. Events could be anything from a wedding, a church picnic, a meeting or a sporting event. As long as it is an event in which the church is involved, it could be included in the Scheduler module. You could even use events to mark cleaning schedules or maintenance.

Events are kept and added within the Events view. Like other views in Shepherd's Staff, you can edit and delete records, sort columns, find or filter for particular events, and even export the list to a spreadsheet.

Note: When the Event view opens, it defaults to displaying events within one week of the current date, and all future scheduled events. For the events that have already passed, they will be highlighted in blue. If you would like to see all the events that you have scheduled in the system, at the top right corner of the grid, there is a checkbox that says "Hide <*1 week prior to present date*" (For example, if today is 6/12/2020, the box would say "Hide <6/5/2020"). If this box is unchecked, you will see all events that have ever been created within the Scheduler module.

On the Events view, you can search through the grid by using the **Search and Filter** options at the top of the view.

The screenshot shows the Scheduler application interface. The main window is titled "Scheduler" and has a navigation bar with five tabs: 1-Events, 2-Inventory, 3-Routes, 4-Reports, and 5-Tools / Settings. The "Events" tab is selected. On the left side, there are three sub-tabs: Events, Rooms, and Contacts. The main area displays a table of events with the following columns: Event, Type, Date, Begin, End, and Rooms. The table shows a list of events from 6/16/2020 to 6/23/2020. The first row, "Tuesday Morning Bible Study" on 6/16/2020, is highlighted in blue, indicating it is a past event. The subsequent rows, from "Women's Bible Study" on 6/17/2020 to "Tuesday Morning Bible Study" on 6/23/2020, are highlighted in green, indicating they are future events. At the top of the table, there is a search bar and a filter checkbox labeled "Hide < 6/16/2020". The right sidebar contains three sections: "Actions", "My actions", and "My reports". At the bottom of the table, there is a toolbar with icons for Add, Edit, Copy, Delete, Repeat..., Change..., Export, Print, and Save. The number "7277" is displayed in the bottom right corner of the table area.

Event	Type	Date	Begin	End	Rooms
Tuesday Morning Bible Study	Education	6/16/2020	8:00 AM	9:00 AM	1
Women's Bible Study	Education	6/17/2020	7:00 PM	8:30 PM	1
Men's Bible Study	Education	6/18/2020	6:00 AM	7:00 AM	1
Friday Lunch Group	Education	6/19/2020	3:30 PM	4:30 PM	1
Saturday Worship	Worship	6/20/2020	5:30 PM	6:30 PM	1
Junior High Youth Bible Study	Education	6/20/2020	6:00 PM	7:30 PM	1
Traditional Worship	Worship	6/21/2020	8:00 AM	9:00 AM	1
Contemporary Worship	Worship	6/21/2020	11:00 AM	12:00 PM	1
Sunday School	Education	6/21/2020	9:30 AM	10:30 AM	1
Adult Bible Study	Education	6/21/2020	9:30 AM	10:30 AM	1
Young Adult Bible Study	Education	6/21/2020	5:00 PM	6:30 PM	1
Senior High Youth Bible Study	Education	6/21/2020	6:00 PM	7:00 PM	1
Adult Bible Study	Education	6/22/2020	10:00 AM	11:00 AM	1
Tuesday Morning Bible Study	Education	6/23/2020	8:00 AM	9:00 AM	1

Add/Edit Event

In the Events view, you can add events. We will walk through, step-by-step how to add a single event to your Events view, or edit an existing event

1. On the Events view, click the "Add" button at the bottom of the view, or if you need to edit an existing event, in the Events view, find the event you need to make changes to, click on it to highlight it, and click "Edit" at the bottom of the grid.
2. In the next window, in the Event field, name the event, and then select which room(s) will be used for this event. You can double click on a room to add it to the list of Rooms assigned, or click on it once and then click the blue right arrow button to move it in to the selected rooms. To remove it from the rooms assigned list, highlight the room in the rooms assigned list, and then click the left arrow button. To designate that all rooms will be used for this event, click the "Assign all rooms" button. Click continue when finished.
3. If the room(s) have contacts or inventory assigned you will be asked if you'd like to use them for this event.
4. Next, you can set the Date, and beginning and ending times for this event. To assist you, when you set your date, you will see all other events happening on that date. If you attempt to add an event in the same room, at the same date and time as another event (or if the times overlap), when you attempt to save the event record, you will receive a warning, and you will not be able to save the event until you change the date or time.
5. Next, fill in what type of event it is in the "Type of event" field, and also the "Expected Attendance", if you have it.
6. You can add additional rooms, contacts and inventory in the "Rooms available, "Contacts available" and "Inventory available" fields. Click the green plus sign if you need to create a new Room, Event, or Contact.
7. If you want to make this a repeating event, check the "Set this event as repeating after save" option.
8. Click Save to save the event record.

Repeat an Event

If you wish to repeat an event, you can do so using the "Repeat an Event" utility on the Event view.

This utility will take a single event and create copies for:

- » Same day of the week, each week—Example: Every Sunday
- » Same day of the week, every other week—Example: Every Other Sunday
- » Same day of the month, each month—Example: 2nd Sunday of each month
- » Consecutive days, starting on—Example: 7/14–7/21

1. From the Events view, highlight the event that you'd like to repeat, and then, at the bottom of the view, click the "Repeat" button.
2. This will open the Repeat an Event window. In this window, select first the manner in which you want to repeat the event. If you select the consecutive days option, make sure to fill in your starting date.
3. In the "Use this pattern" section, fill in the number of times you'd like this event to repeat using the method you selected below.
4. Click Continue.
5. If there are any conflicts, you will receive a warning, showing which events this repeating event would conflict with, and you will be returned to the "Repeat an event" window.
6. If there are no conflicts with the event, you will be shown a listing of all the events that will be created. If everything looks correct, click "Save" and your repeating events will be created.

Change a Repeated Event

If you find at some point you need to change a repeated event, you can do so. If you just need to change a single event due to a rescheduling or cancellation, you can do that just by selecting the event in the Events view and clicking on the "Edit" button to edit that one event.

1. Make a **backup** first.
2. On the Events view, highlight the next event in the repeating series of events that you want to change.
3. Click on the Event and choose "Edit" and then make any changes you need to make to the series of events. Save your changes when completed.



However, if you want to save that change to every instance of the event (moving from Mondays to Wednesdays from now on) you will need to use the "Change Event utility."

1. On the Event view, with the event you made the changes to still selected, click the "Change" button at the bottom of the view
2. In the "Change an event" window that appears, make sure the event you want to change is selected.
3. In the Date Range section, choose if you want to change all remaining events in the series, or all future events between a set date range.
4. Click Continue
5. If there are any conflicts that would be created by this change, you will see a window that will tell you what events that these changes will conflict with, and you will be returned to the "Change an Event" window.
6. If there are no conflicts that would be created by this change, you will see a listing of your events, and you will be asked if you want to save the changes that were made. Click Save to save your changes, or click Go back, to return to the previous window.

Exporting to Google Calendar

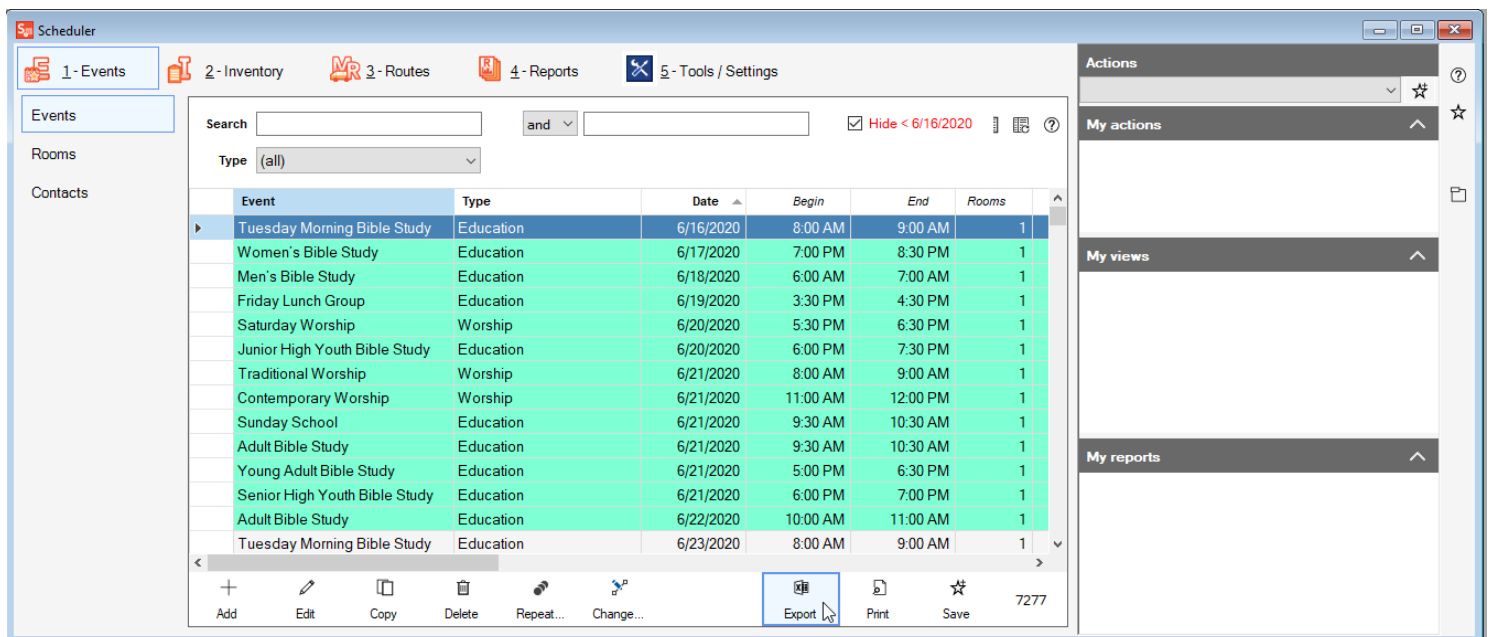
Google Calendar is a free, and very user-friendly, calendar application you can find online. Many churches use it to manage their church calendars. Because of this widespread use, you can now export your event list from Shepherd's Staff and import it to Google Calendars.

Note: In order to do this, you must already have a Google Calendar account set up.

To import to Google Calendar:

1. Export to Excel from the Events view by clicking on the Export option at the bottom of the view, and save the exported spreadsheet to your desktop.
2. Log into your Google Calendars account.
3. In the upper right hand corner of the page, click the settings cog to open your menu options.
4. Select the "Calendars" tab.
5. Click "Import Calendar" and choose the excel document you exported in Step 1.
6. Choose which calendar you want the event(s) to be imported into.
7. Click "Import"

For more information about importing event into Google Calendar, check out Google's help page [here](#).



The screenshot shows the Scheduler application interface. The main window displays a list of events with columns for Event, Type, Date, Begin, End, and Rooms. The 'Export' button is highlighted in the bottom toolbar. The interface includes a search bar, a 'Hide < 6/16/2020' checkbox, and a sidebar with 'My actions', 'My views', and 'My reports' sections.

Event	Type	Date	Begin	End	Rooms
Tuesday Morning Bible Study	Education	6/16/2020	8:00 AM	9:00 AM	1
Women's Bible Study	Education	6/17/2020	7:00 PM	8:30 PM	1
Men's Bible Study	Education	6/18/2020	6:00 AM	7:00 AM	1
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Saturday Worship	Worship	6/20/2020	5:30 PM	6:30 PM	1
Junior High Youth Bible Study	Education	6/20/2020	6:00 PM	7:30 PM	1
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Sunday School	Education	6/21/2020	9:30 AM	10:30 AM	1
Adult Bible Study	Education	6/21/2020	9:30 AM	10:30 AM	1
Young Adult Bible Study	Education	6/21/2020	5:00 PM	6:30 PM	1
Senior High Youth Bible Study	Education	6/21/2020	6:00 PM	7:00 PM	1
Adult Bible Study	Education	6/22/2020	10:00 AM	11:00 AM	1
Tuesday Morning Bible Study	Education	6/23/2020	8:00 AM	9:00 AM	1

Routes

Route records allow you to schedule and track ministry routes your church carries out.

This can include anything from Christmas carolers to a food delivery service. This section will walk through how to create these route records.

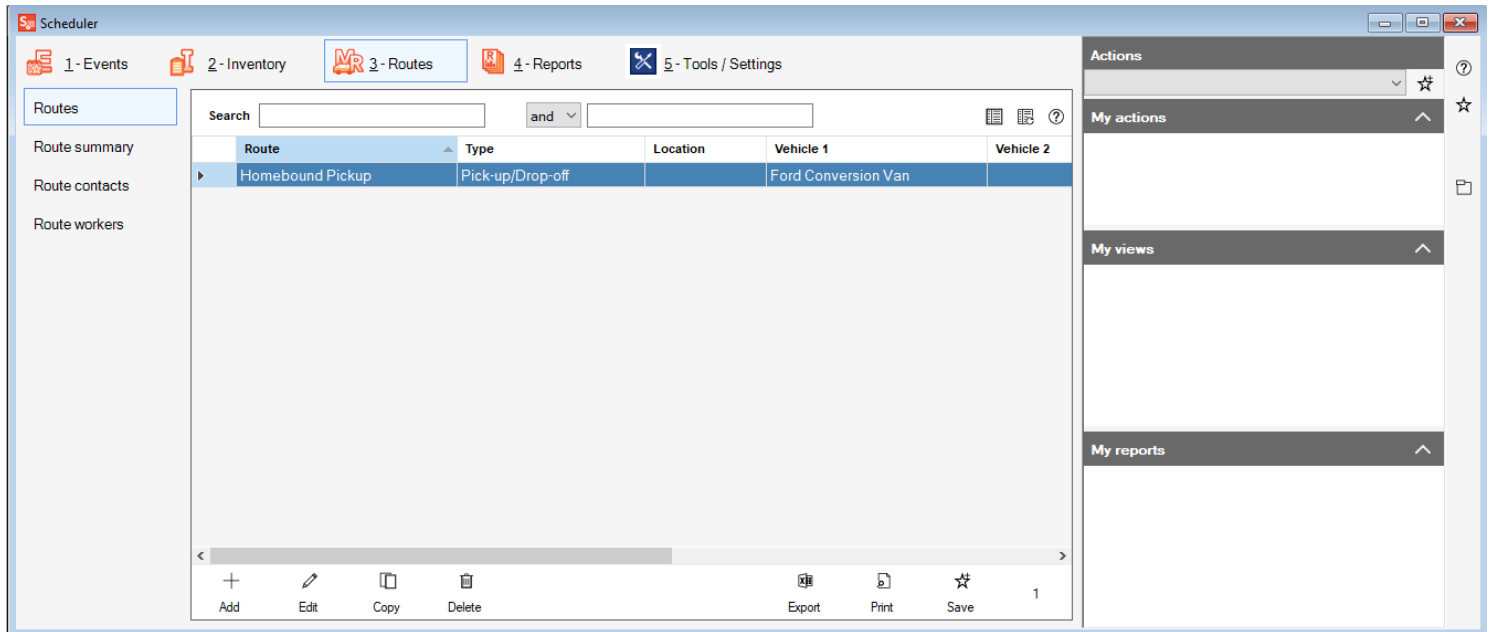
- ▶ [Introduction to Routes](#)
- ▶ [Add/Edit Routes](#)
- ▶ [Route Summary](#)
- ▶ [Add/Edit Route Summaries](#)
- ▶ [Route Contacts](#)
- ▶ [Route Workers](#)

Introduction to Routes

Many churches have a bus or van ministry that they use to help members of their congregation and community.

These ministry routes can consist of everything from busing in children for VBS or picking up teens for youth group to offering ride assistance to the elderly or delivering food.

The Routes feature is, at its core, a tool to help you organize and grow your routes and record the results for tracking the success of your route ministries.



Add/Edit Routes

When your church decides to start a ministry where they utilize a bus or van to get people to and from church, adding a route record can help you keep track of who all is involved with the route, both workers/drivers and riders/contacts. We'll walk through adding a route, or editing an existing route below.

1. Click on the Routes tab at the top of the Scheduler module to access the Routes view.
2. Click the "Add" button at the bottom of the view to create a new Route record, or to edit an existing route record, click on the record you need to update and click "Edit".
3. In the Route record, start by typing in the name of the Route in the "Route" field. This is a required field.
4. Next, in the Type of route, give a generalized description of what the route is for, such as "VBS" or "Senior Citizens"
5. In the "Location of route" fill in the general area where the route will take place, such as a specific neighborhood or area of the city.
6. In the Riders/Contacts available section, you'll see a list of all your contacts. If you need to add an additional contact, click the green plus sign button to do so. Once you've selected your contact, click the blue right arrow button to add them to the list of Riders/Contacts assigned.
7. When you add a person to the Riders/Contacts assigned list, you will be asked to enter in pick up and drop off information. The Drop off and pick up numbers represent in what order you'll drop off and pick this person up on the route. The Drop off and pick up times represent (generally) what time you'll be dropping off and picking this person up. The comments field can contain whatever additional information is needed. Click continue when finished.
8. In the Workers/Drivers available section, you'll see a list of all your contacts. If you need to add an additional contact, click the green plus sign button to do so. Once you've selected your contact, click the blue right arrow button to add them to the list of Workers/Drivers available.
9. When you add a person to the Workers/Drivers assigned list, you will be asked to enter in what category this person belongs to. This field is optional, but you may use this to say if a person is a driver on the route, or possibly a supervisor who rides along with the driver. The comments field can contain whatever additional information is needed. Click continue when finished.
10. In the Vehicles available section, you'll see a list of all your vehicles. If you need to add an additional vehicle, click the green plus sign button to do so. Once you've selected your vehicle, click the blue right arrow button to add the vehicle to the list of Vehicles assigned. A comments window will appear if you want to add any additional comments. Click continue when finished.

1. Click the Save option at the bottom left to save the route record you added.

Add route — □ ×

*** Route**

Type of route

Location of route

Notes

Riders/Contacts available +

Carter, Teresa Wanda
Dowling, Arlene Kimberly
Owens, Rebecca Christine
Williams, Kent David
Woods, Derek Jamal
Wright, Timothy K. (Tim)

Riders/Contacts assigned

Name	Drop off num.	Drop off time	Pick up num.	Pick up time	Cell phone

Workers/Drivers available +

Carter, Teresa Wanda
Dowling, Arlene Kimberly
Owens, Rebecca Christine
Williams, Kent David
Woods, Derek Jamal
Wright, Timothy K. (Tim)

Workers/Drivers assigned

Name	Category	Cell phone	Home phone	Email

Vehicles available +

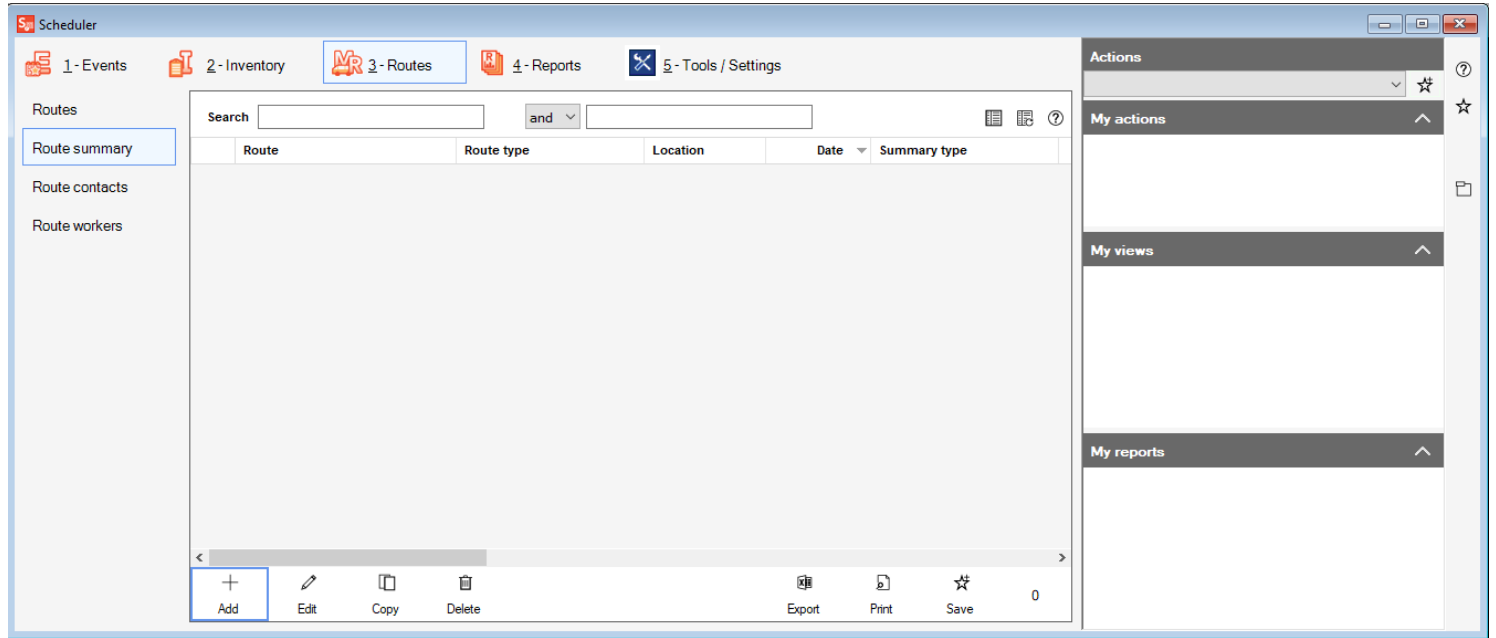
Ford Conversion Van

Vehicles assigned

Name	Comments

Route Summary

Once a route has been created, it will likely be used more than once, and you'll need to record the details of the route each time it is run, as while you do have a set plan for the order in which people are picked up and dropped off, each person may not be available for pickup and drop off each time the route is run. Knowing this, Route Summaries allow you to record the specifics of a route each day it is run.



Add/Edit Route Summaries

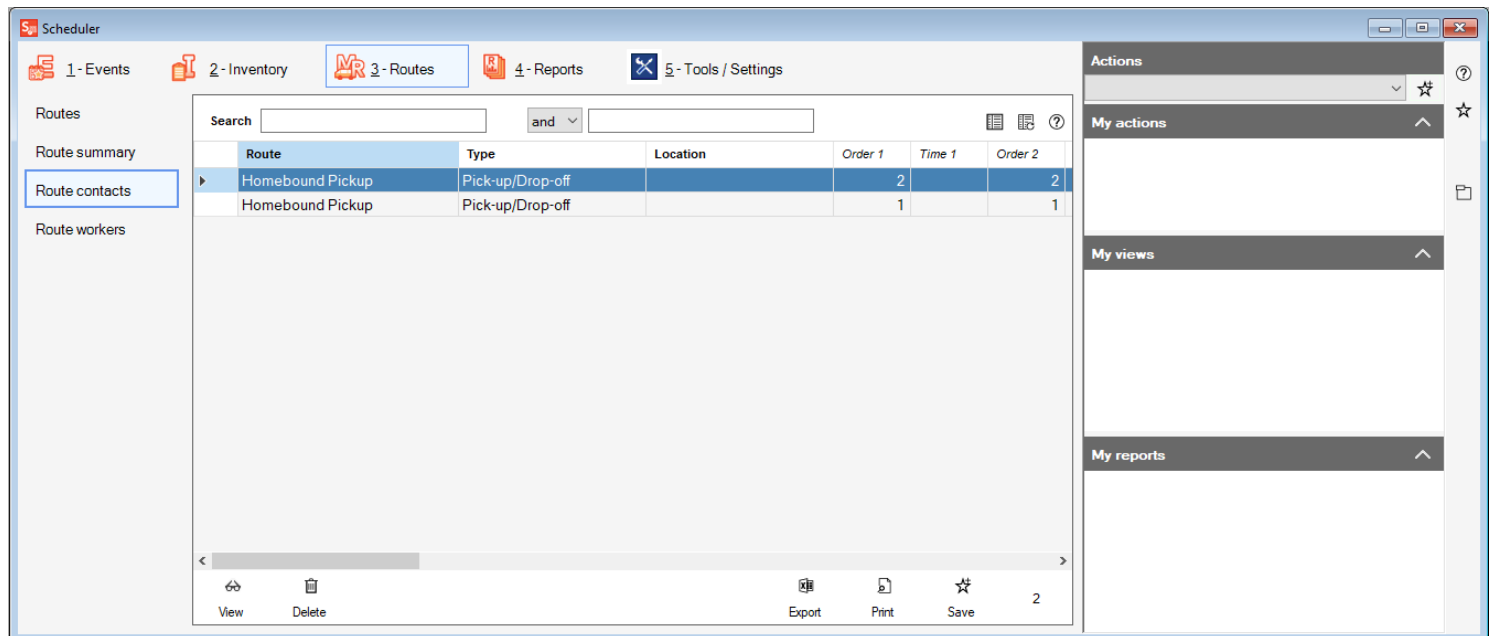
Each time a route is run, a new route summary record should be created to track the details of that day's running of the route. We will walk through how to add a route summary below, and also how to edit an existing route summary record.

1. You can access the Route summary view by clicking on the Routes tab at the top of the window, and on left side of the screen, click on Route Summary to pull up the Route Summary Grid.
2. Click the add button at the bottom of the window to create a Route Summary record, or if you need to edit an existing route summary record, click on the record you need to update and click "Edit".
3. The first thing to select in the Add Route Summary window is which route is being run. You can select this in the "Ministry Route" field, where each route that has been added will appear. You can then select what the date the route was run on in the "Summary date" field.
4. In the type/category field, you will need to fill in what type of route this was, such as "VBS" or "Food Delivery"
5. The Expected riders / contacts fields and the Actual riders / contacts field represent how many contacts you were expecting to have on this route, and how many you actually had on the route for the day respectively. Visitors represents non-registered contacts for the route that you picked up (such as children bringing a friend to VBS). Total riders/contacts the total number of people that were served on this ministry route.
6. The Miles field represents how many miles total were driven on this instance of the ministry route. Total stops represents the number of stops made to pick up and drop off contacts for the route. The third field, Quantity is open for whatever use you may need, as it is a user-defined field, which can be edited in the Tools/Settings section of the Scheduler module.
7. The Driver and Assistant fields let you designate who drove on this route, who their assistant was (if present). The Text 1 and 2 and the Checkbox 1 and 2 fields are user-defined fields which can be edited in the Tools/Settings section of the Scheduler module.
8. Any additional notes can be filled in to the Notes field.
9. Click Save when finished to add the Route Summary record.

Route Contacts

The Route Contacts view lets you get a quick look at who the Riders/Contacts are for each route in a grid view. By utilizing the filters on this grid, you can get a quick listing of who is on a particular route, or you can even search to find what routes a person is a Rider on. This view even lets you filter by types of routes.

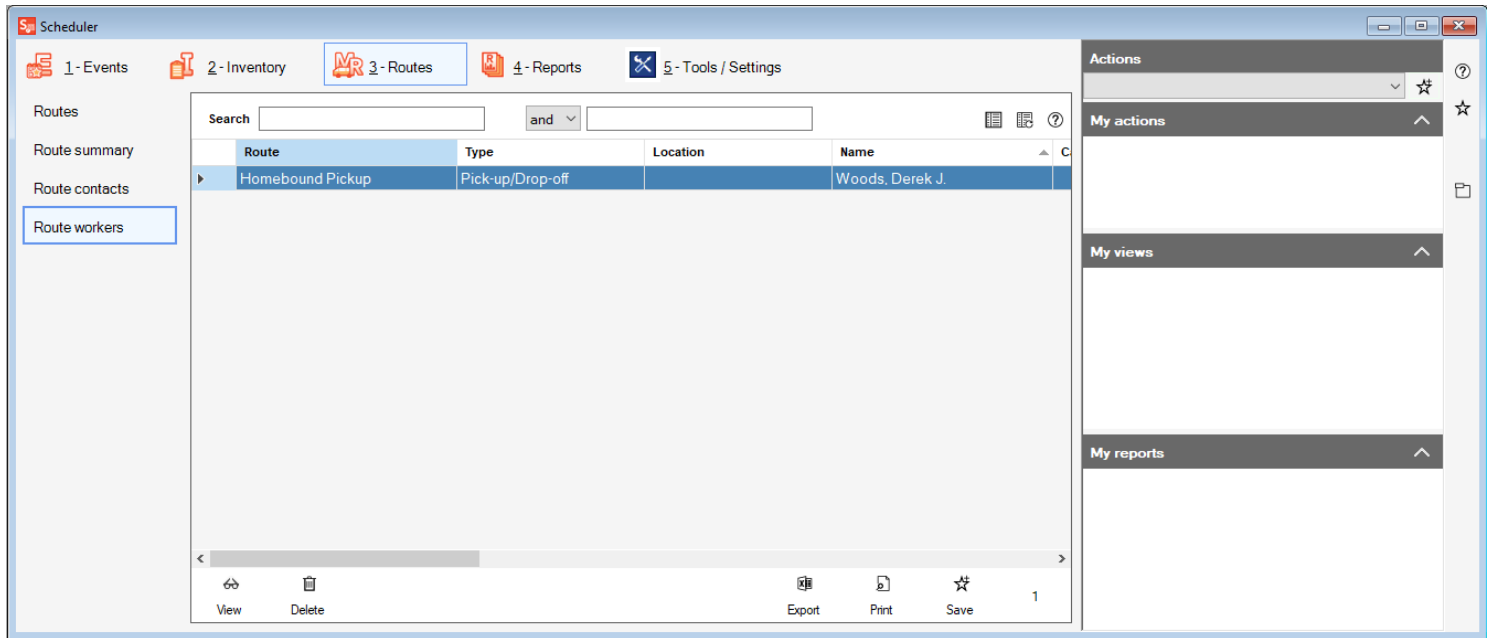
To access the Route Contacts view, click on the Routes tab at the top of the scheduler module, and then click the "Route contacts" tab on the left side of the window. From here, you can view your route contacts and use the filter options to get just the list you want. Once you have the list of contacts you want, you can click the print option to print out a listing of route contacts you want.



Route Workers

The Route Workers view lets you get a quick look at who the Drivers/Workers are for each route in a grid view. By utilizing the filters on this grid, you can get a quick listing of who works on a particular route, or you can even search to find what routes a person works on This view even lets you filter by types of routes.

To access the Route Workers view, click on the Routes tab at the top of the scheduler module, and then click the "Route workers" tab on the left side of the window. From here, you can view your route workers and use the filter options to get just the list you want. Once you have the list of workers you want, you can click the print option to print out a listing of route workers you want.



Reports

There are many Scheduler Reports that help with anything from tracking your room usage to looking at a church's calendar of events. This section will guide you through each report, including the steps to use them.

- ▶ [Calendar Report](#)
- ▶ [Events Report](#)
- ▶ [Inventory Report](#)
- ▶ [Room Usage Report](#)
- ▶ [Route Details Report](#)
- ▶ [Vehicles Report](#)

Calendar Report

The Calendar report allows you to print a calendar showing any or all of your Events. You can also use it to print a blank calendar for requesting events, or even create an HTML version of your calendar to post on the church's website.

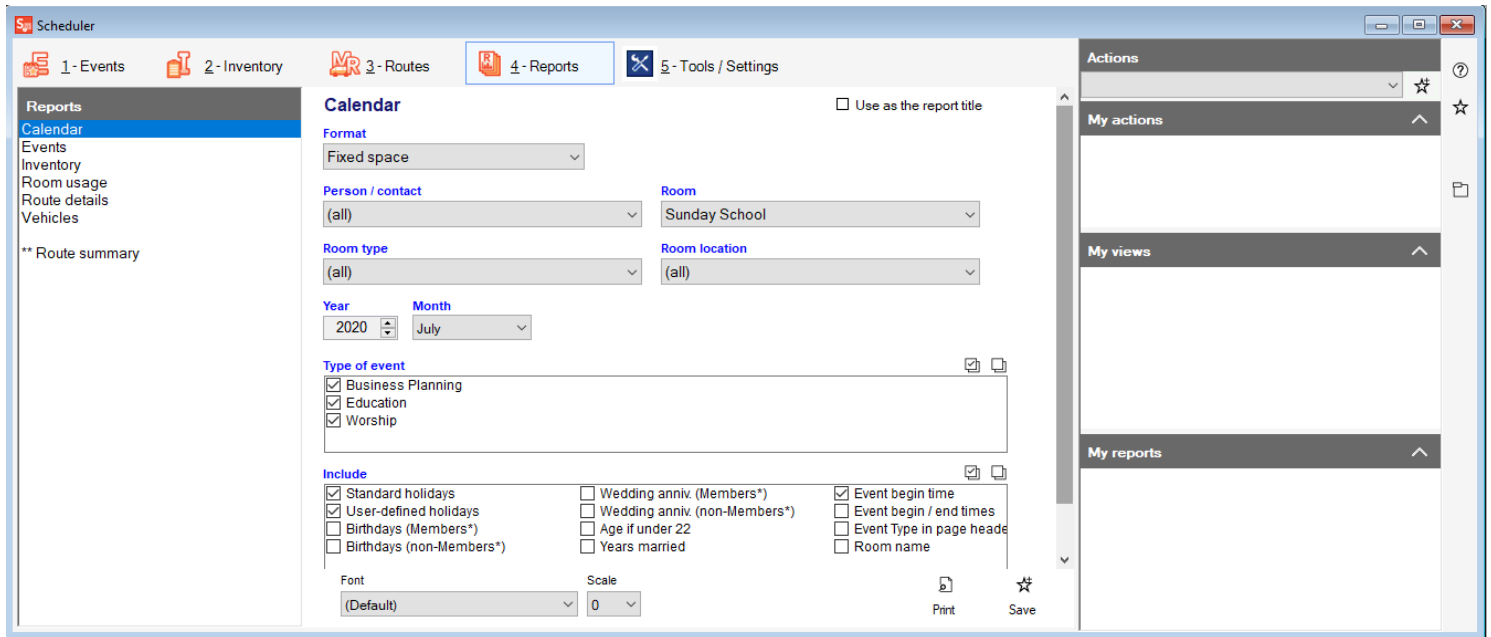
This report comes with the following formats:

- » **Fixed space** – Prints the calendar where each day will take up the same amount of space on the calendar. This does mean if you have too many events occurring on the same day, some of the events may not appear.
- » **Fixed space (8.5" x 14")** – This is the same as the previous report, except it has been formatted to fit on an 8.5" x 14" sheet of paper.
- » **Variable space** – Prints the calendar where each week on the calendar will take up different amounts of space based upon the day with the most events on that week. Unlike the Fixed space options, you don't run the risk of not showing events if there are too many events on a particular day, but, this does mean that your calendar may have weeks that have big differences in their sizes.
- » **CSV (for importing)** – This calendar format will export your calendar for the month you chose out to a CSV format in Excel when you click the print button. From Excel, you can then save the file to your computer and use that to import into another source, such as Outlook or Google Calendars.
- » **HTML (for websites)** – This feature will direct you to use the fixed or variable formats, preview the calendar and use the export feature in the print preview screen to export an HTML format of your calendar.
- » **Blank** – This calendar format will remove all but the date selection from the report screen, and allow you to print a blank calendar for the chosen month and year.

Note: Holidays will always be shown at the top of the day they occur on.

1. The calendar report can be found in the Reports tab of the Scheduler module.
2. Select the format that you want to use for your calendar in the "Format" box.
3. In the Person/contact, Room, Room type, and Room location fields, select which options you would like to filter by, if any. If you don't want to filter based on any one of these fields, leave them set to "all"

4. In the year and month boxes, set what year and month you want to run a calendar field.
5. In the Type of event field, select what type of attendance events you would like to include on your calendar.
6. In the include section, you can choose what additional options you'd like to include on your calendar, such as holidays, birthdays, wedding anniversaries, and start and end times for events.
7. Click the Print button at the bottom right of the window to get a preview of your calendar.



Events Report

The Events report lets you see a listing of events over a particular time period, or all the details about one specific event in the future or past. This can be useful to see who and what is going to be needed for a future event, and is a good way to plan ahead for events.

There are three formats for this report:

- » **Event List** — This report shows all events within a particular time period, and for each event, shows your selection of Contacts, Inventory, Rooms and Room Notes for those events.
- » **For a future event** — This report lets you pick one particular event in the future and shows your selection of Contacts, Inventory, Rooms and Room Notes for that event.
- » **Event List** — This report lets you pick one particular event in the past and shows your selection of Contacts, Inventory, Rooms and Room Notes for that event.

1. The Events report can be accessed in the Scheduler module by clicking on the Reports tab, and then clicking on the Events option under Reports on the left side of the window.
2. First, choose your format for the report in the "Format" field. The filter options below the Format section (Event type, Room, Inventory, and Contact) only appear in the Event List format option, otherwise, you will see an option to select which event you want to get a report on.
3. In the Sort by field, select how you want your Event List to be sorted.
4. The Event type, Room, Inventory and Contact fields are filter fields, and you can choose what you would want to filter by in each of these fields. If you do not wish to filter by a particular field, leave that field set to (all).
5. The Events between section lets you choose what date range you want to see when you run your Event List.
6. The Include section lets you select what information you want to see about each of your events.
7. Click print to generate a preview of your report.

Inventory Report

The Inventory Report provides you with a listing of your inventory arranged in different ways, and even a blank form that can be filled out for new inventory. The Inventory Report has 5 different formats:

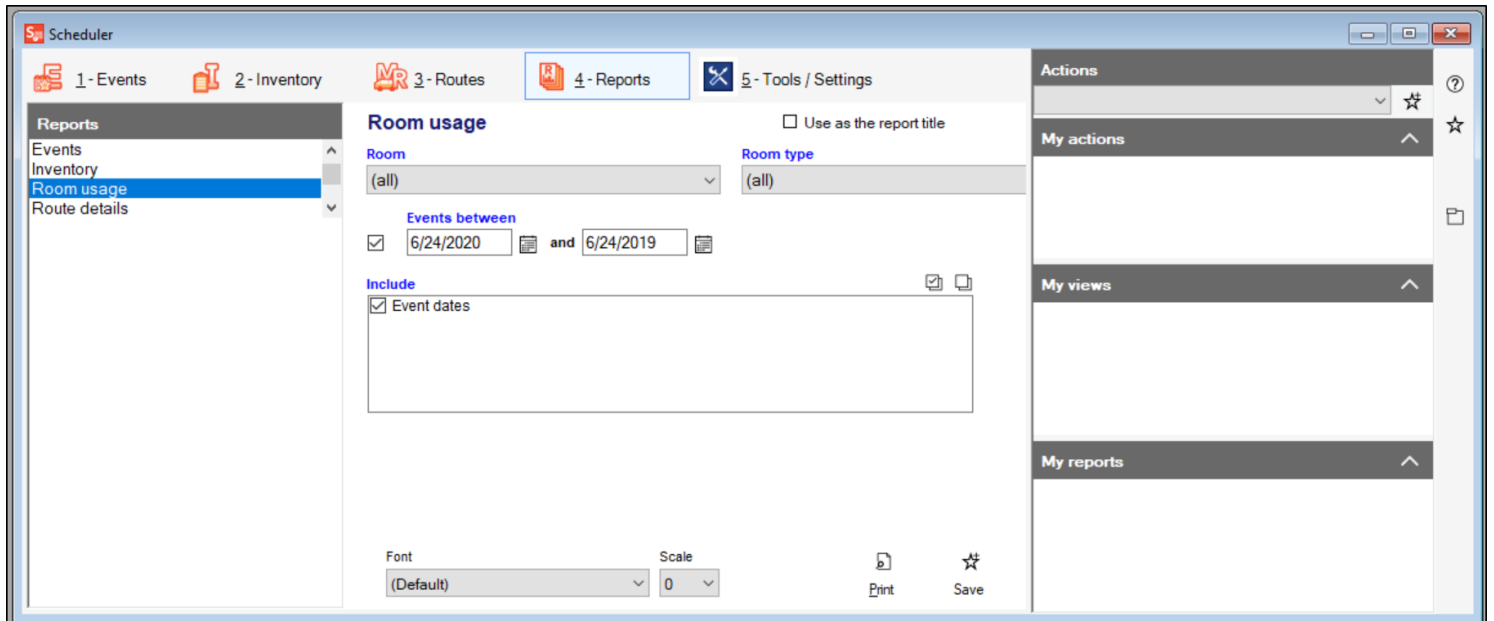
- » **Inventory List** – This is a simple listing of your inventory items and vehicles, with options to show the inventory location, notes, Identification details, Acquisition details, and Rooms and quantity.
- » **Inventory List by Room** – This is similar to the Inventory List report, but it shows what inventory is being used in each room.
- » **Inventory Valuation** – This report shows the inventory items and vehicles and what their original value was, and their current value, based on what has been entered in the valuation section of the inventory record
- » **Inventory Usage in Events** – This report shows what events different inventory items are being used in.
- » **Blank Form** – This report provides you with a blank form to record details about new inventory items.

1. To access the Inventory Report, click on the Reports tab, and then click on Inventory on the left side of the window.
2. Select the format of Inventory report you'd like to use.
3. In the Status field, select if you want to see this report for items that are in service, out of service or both (select any to see both).
4. The Inventory type, Room, Room type, and Room location fields act as filters that let you see only inventory from the select fields. If you do not wish to filter based on a particular field, leave it set to (all)
5. If you only want to see inventory that has been acquired during a particular date range, check the box next to Acquired between, and then set your date range.
6. If you're running the Inventory valuation report, you can check the box next to "Last valuation <=" to see only items that have been valued before the date you set.
7. In the include section (only included in some formats of the report) you can choose which additional details you'd like to see on the report.
8. Click Print to generate your report.

Room Usage Report

The room usage report shows how many times a room is being used within a particular date range, what events are taking place there and optionally, what dates the room is being used on. This is useful to see what rooms are your "high traffic" rooms, and look at possibly moving events to different rooms. to avoid potential conflicts.

1. To access the Room Usage report, click on the Reports tab, and then click Room Usage on the left side of the window.
2. The Room and Room type fields act as filters that allow you to show only a particular room or room type on your report.
3. Set your date range by checking the box for the "Events between" field and setting a starting and ending date for your date range.
4. If you wish to see the individual event dates, check the "Event dates" box in the Include section.
5. Click Print to generate your report.



Route Details Report

The Route Details report is an important report to run if you utilize the Routes feature of Shepherd's Staff. This report allows you to generate route checklists, a listing of all the contacts and workers on a route, as well as a generic checklist for a route that you may not have yet established in Shepherd's Staff.

There are three different formats for the Route Details report:

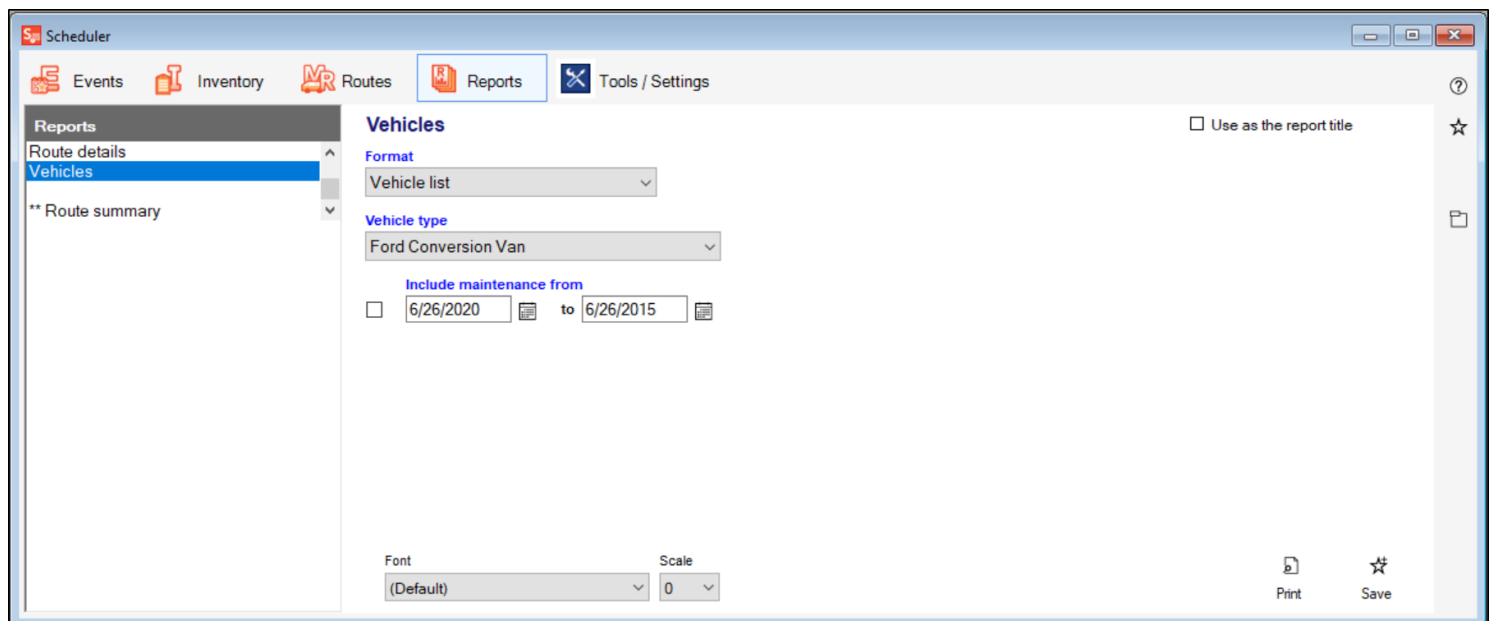
- » **Contact checklist** – This format provides you with a checklist of all the contacts you have on a route, in the order that they are set within the route, in a checklist format so your route workers can take this form along and check off who they have picked up, and later, dropped off.
- » **Route Details** – This format provides you with a listing of all the contacts and workers you have on a route to review, along with other additional information you choose.
- » **Route Details** – This format provides a generic route listing with spaces for names on it that you may not have on the route already.

1. To access the Route Details report, click on the Reports tab and then click "Route details" on the left side of the window.
2. Select the format of the report you want to use in the "Format" field
3. Choose how you want your contacts sorted, either in Name order, Pickup order, or Drop off order in the "Sort contacts by" field
4. Select which route you'd like to run the report for in the "Route" box. If you want to run this for all routes, select the (all) option.
5. In the include section, choose which pieces of additional information you'd like to include on your report.

Vehicles Report

The Vehicles report provides a listing of all the vehicles your church owns, or a blank maintenance form to record the details of maintenance performed on a vehicle. Both of these reports are useful as the vehicle list can help you provide information to insurance providers, while the vehicle maintenance form can help you record all the relevant details of maintenance performed on your vehicles at your church.

1. To access the Vehicles report, click on Reports and then click on Vehicles on the left side of the window.
2. Select the format you would like to run the report in, either Vehicle List or Blank maintenance form
3. In the Vehicle type field, select the vehicle you would like to run this report for, if you want to just see information for one vehicle, or you can leave it set to (all) to run the report for all of your vehicles.
(Applies only to the Vehicle List format)
4. If you want to include maintenance information on your report, check the box for "Include maintenance from" and then fill in the date range you want to see maintenance for. (Applies only to the Vehicle List format)
5. Click the print button to generate your report.



Tools and Settings

This section will show you the tools available to you in the Scheduler module.

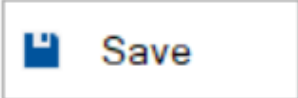
- ▶ [Customize Field Names](#)
- ▶ [Cleanup](#)
- ▶ [Custom Holidays](#)

Customize Field Names

Throughout the Scheduler module, there are field that you are able to rename to better suit the needs of your church. In the tools section of the Scheduler module, we provide an option to update these field names.

Note: You must be logged in with full supervisor level access to all modules to be able to make changes to the field names.

1. To make changes to field names, click on the "Tools/Settings" tab.
2. Check the box next to "Customize field names"
3. In the "Field" box, select the field that you'd like to make a change to.
4. In the "Change to" box, type in what you'd like change the field name to. In blue text next to this box, the system will let you know where this field is located.
5. Click the Save button to save your changes when finished.

Customize field names 

Field

Change to Scheduler Route Summary Total 1

Cleanup


Over time, your church may decide that you would like to delete events that have already happened from your Scheduler module. If this is the case, the Scheduler module has a cleanup tool built in to help you accomplish this task.



Note: You must be logged in with full supervisor level access to all modules to be able to run the cleanup utility.

1. To access the cleanup utility, click the Tools/Settings tab.
2. In the tools section, make sure "Cleanup" is selected, and then click Start
3. In the window that appears, first, choose what type of event you want to remove. If you want to remove events of all types, leave this field set to (all)
4. In the Occurring during this date range field, set the date range of events that you would like to remove from your system.
5. Click Next
6. You will be provided with a listing of each event that will be deleted. If you would like, you can export this list out to Excel by clicking the "Export" button.
7. Click continue to confirm the removal of the events that are showing on the list. You will receive one more prompt asking if you would like to delete the events within the date range you selected. Click Yes to complete the removal of these events, or No to return to the previous window.

Select the date range for which to remove events, and click Next.

Next

Event type (all) 

Occurring during this date range 6/26/2010  to 6/26/2018 

Cancel



Custom Holidays

The Custom Holidays tool allows you to create special holidays that are relevant to your church, such as noting a church's 100th year anniversary or a yearly church picnic. You have the option of making these custom holidays appear on your Calendar report, and they will also appear in the "Month at a Glance" view.

Note: You must be logged in with full supervisor level access to all modules to be able to create custom holidays.

1. To access the Custom Holidays utility, click the Tools/Settings tab.
2. In the Tools section, select "Custom holidays" and then click Start.
3. In the window that appears, fill in the date of the holiday you want to add in the "Date" box.
4. In the Description box, fill in the name of this holiday.
5. Click the "Add holiday" button to add the Holiday to your list of custom holidays.
6. If you need to make changes to a holiday that's already on the list, click on the holiday you need to make changes to in the custom holiday list, and click the "Edit" button, and then make any changes that are needed
7. If you want to remove a custom holiday from your list, click on the holiday you need to remove in the custom holiday list, and then click the "Delete" button.

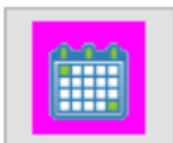
Custom Holidays

Close

Holidays

Use this utility to add holidays and other special dates to the pop-up and printable calendars.

Date



Description

Add