PARISH DATA SYSTEM™

PDS Ministry Scheduler Training Guide
2016

Contents

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Introduction to This Guide

Today you'll discover how to manage your masses and assign ministers using PDS Ministry Scheduler. Being able to set up a schedule is important, but we'll also go over how to print and email schedules, specify times when ministers are unable to serve, and group ministers to serve together.

If you're new to the program, we'll talk about how to set up your minister records and schedules, along with some defaults and preferences. Before you know it, you'll be scheduling ministers like a pro!

Let's start off with another introduction

Paula Martin has been on staff at Saint Mary's Catholic Church for almost 5 years now. She was reluctant to use new software at first, but after a product demo, she sees that it eliminates a lot of manual work she's had to do.

Paula has over 20 events and daily, weekend, and special masses. She's also responsible for tracking and scheduling 9 ministers and 6 volunteers.

Anytime someone can't serve, Paula gets an email. Anytime someone thinks they can't serve but then finds out they can, Paula gets an email. Paula gets a lot of emails.

Right now, she does her best to track all of this information in a bunch of different spreadsheets. Between those and her emails, it can get confusing. Paula looks forward to better organization and management of Saint Mary's masses and ministers. So let's begin.

Unit 1: Setting Up PDS Ministry Scheduler

Paula's eager to jump in and start working. But before she can add her schedules, she needs to think of how scheduling should work for each minister and each mass.

By the end of this unit, you'll be able to:

- Set the minster ID number options and maximum assignment options
- Select the default scheduling options you want to use
- Add your parish's special dates (like birthdays and appointments) as well as holidays to the calendar in PDS
- Add the types of ministries your ministers serve
- Establish your email settings and text message providers

✴ Get Started

The first thing Paula has to do is start Ministry Scheduler. That's easy enough! Double-click the **PDS Ministry Scheduler** icon on the desktop.

The very first time you open PDS, the License Registration Wizard displays. This helps you create a new database or convert your data from a prior version.

✴ Set Initial Options

At Saint Mary's, each minister has an ID number. Paula wants these to be same as the minister's ID in PDS. She can pick a number to start with in PDS and choose whether to assign these IDs automatically. Likewise, she can choose an ID number to start from for family records.

Paula can set certain defaults and maximum values for her ministers and their assignments. For example, Saint Mary's doesn't allow a minister to have more than seven assignments in a single week, and there can only be up to 10 ministers in a single ministry.

To set these options for your parish, on the File menu, click **Setup** > **Initial Setup**.

We'll talk about the rest of the options a little later.

✴ Set Up Your Calendar

Paula wants holidays and special events to show up on her calendar. Seeing those can help her when scheduling minister assignments. At Saint Mary's, ministers don't have to serve on their birthday (unless they want to). This way, Paula can see in PDS when those birthdays occur.

Before you start, make a list of important days you want to include.

To set up special days and holidays

1. On the File menu, click **Setup** > **Special Days & Holidays**.
2. Click **Automatic Setup for a New Year**.
3. Select **Choose predefined dates**, then select the type(s) of dates you want to show on your calendar. Click **Add/OK**.
4. If you want to add special days like birthdays, click **Insert Date**. Enter the information for the special day, then click **Save/OK**.
5. Click **Close**.

✱ Set Up Options Used for Scheduling

Before Paula can schedule any masses, she has to set up the scheduling options. This improves the way the scheduling process works for Saint Mary's specific needs.

It may take some time to fully understand how the options you choose affect who is scheduled at what time. But don't worry – you can always come back and change these options later.

Figure 1-a. Scheduling options tabs

Let's talk about these options.

Cannot Serve Days

The children's minister, Ana, can't serve on Mondays or Wednesdays because she works at Saint Mary's Catholic school those days.

When Paula adds minister record, she can specify the days each minister are unavailable. If ministers absolutely cannot serve a particular day, even if it's a special mass, select the option to enforce the ministers' "Cannot Serve Days" for special masses. That way, ministers are never considered for scheduling on their selected days.

For example, let's say All Saints Day is on a Wednesday. Saint Mary's has a special mass that day. If the option is enforced, Ana is not scheduled for this mass since she specified that she can't serve on Wednesdays.

Normally, Saint Mary's school is closed when special masses occur, so Ana is available serve. And Ana has told Paula that she can always get a substitute if needed. So Paula decides not to enforce Cannot Serve Days for special masses.

Preferred Mass Settings

After Paula adds minister records in PDS, she can specify certain masses that each minister prefers to serve. Debbie Stewart, the prayer minister, likes to serve at the regular 9:00 AM mass every Sunday. Let's look at some decisions Paula has to make around preferred masses.

If the regular 9:00 AM mass falls on a holiday Sunday, it's considered a special mass. In Ministry Scheduler, a special mass replaces a regular mass. The question is, should Paula let Debbie serve at her preferred time, even if it's during a special mass?

- If Paula wants to allow Debbie to serve no matter what, she can select **Use a Preferred Mass for a Special Mass Replacement**.

- Otherwise, if Paula only wants Debbie to serve at 9:00 AM on regular mass days, she should clear this option.

Debbie also likes to serve at the Christmas Midnight Mass. However, she indicated that she cannot serve after 8:00 PM. Should Paula let Debbie serve her preferred mass, even if it's at a time she can't serve?

- If Debbie shouldn't serve during her Cannot Serve time, Paula can select **Deny a Preferred Mass if it occurs during a Cannot Serve Time of Day**.

- Otherwise, if Debbie should serve her preferred mass no matter what time it occurs, Paula can clear this option.

There are two options for managing preferred masses for ministers:

- Assign mass #1, then mass #2, then mass #3. If Paula assigns ministers to preferred masses in this strict order, she can select **Always Consider Ministers Preferred Masses in Original Order**.

- For week 1, assign Mass #1. For week 2, assign Mass #2. For week 3, assign Mass #3. If Paula wants to rotate ministers through the preferences like this, she should select **Rotate Through Ministers Preferred Masses**.

Daily Mass/Max Assignments

Paula can set the maximum number of times a minister can serve. This comes into play when the scheduler assigns ministers. Since daily masses may happen on one day or multiple days, Paula needs to determine how the scheduler views those masses.

For example, Saint Mary celebrates a daily mass on Wednesdays and Thursdays. If Paula selects **Consider Daily Mass and Ministers Max Assignments**, Ministry Scheduler creates two entries and assigns one minister to both days. This shows up as two assignments, so the minister must have the capacity to serve two days per week and/or month.

Otherwise, if Paula chooses not to consider these and clears the option, the scheduler creates only one entry for the mass. A minister is assigned to Wednesday, which actually represents both days.

Minister Names

Paula can choose how minister names appear in the Scheduled Weeks list and whether the ministry abbreviation displays. She can also choose the order the ministers show up after she creates a schedule.

Rename Unfilled

Once Paula creates a schedule, there may be some positions that weren't assigned. This could be because no ministers were available for that ministry or time slot, or the minister's preferences prevented them from being assigned.

Mass Date & Time	Eucharistic Minister
Confession on Tue 12/20/2016	Ansel,Philip
Confession on Tue 12/20/2016	<Unfilled Position>
Confession on Tue 12/20/2016	Duke,Henry

Figure 1-b. One unfilled Eucharistic Minister position for Confession

When no ministers are assigned to a position, it shows up on the schedule as **<Unfilled Position>**. However, you can customize this to anything you want or make it show up as a blank space.

Determine Weeks

The scheduler needs to know how St. Mary's views each "week" in a month. Here's what it affects:
If the last day of the month is on a Saturday, how do you want to schedule for those days since mass scheduling starts on Monday and ends on Sunday?

We recommend that you choose to consider Saturday as the last week of the previous month, and consider Sunday as the first week of the next month.

However, if needed, Paula can consider both days as the first week of the next month or she can consider both days as the last week of the previous month.

To set scheduling options

1. On the File menu, click **Setup** > **Scheduling Options**.
2. On each tab, select the options that meet your parish's needs.
3. Click **Save**, then **Close**.

Paula feels overwhelmed by the vast flexibility used in scheduling. You might be feeling the same way. Remember that you don't have to use every option just because it's there. Start by using only the basic options you need, then slowly add more options as you need them.

Here are some tips to ease the tension:

- The more "open" your schedule is, the easier it is for ministers to be scheduled. If you select a bunch of options to restrict who can serve when, it's more difficult for ministers to be assigned.

- It's usually better to start with a relatively closed scheduling process. Then you can open it up as needed for the church's needs or for each minister's needs. This also helps you get a better grasp when you're first learning how to use Ministry Scheduler.

- Run a few practice schedules and test out different options.

Think about all of your ministers and masses. Make a list of your ministers and what you think their Cannot Serve Days are. List any additional options for each minister that you can think of.

<u>(Minister Name)</u> cannot serve <u>(days, weeks, and/or times)</u>

_____ cannot serve _____

    Additional options: _____

_____ cannot serve _____

    Additional options: _____

_____ cannot serve _____

    Additional options: _____

Once you get back from training, plan to discuss these options with each minister. After that, you can decide how "open" you want your scheduling process to be, and how easy you want it to be for your ministers to be assigned.

Now it's your turn

1. Paula scheduled the masses for next week. On Monday, she gets a call from Ana. She's scheduled for the special Ash Wednesday mass, but she's not able to serve on Wednesdays. Paula checks Ana's Cannot Serve Days, and Wednesday is selected, as it should be.
   Why is Ana scheduled on her Cannot Serve Day? How can Paula correct this?

   _____

   _____

✳ Add and Combine Keywords

Before Paula came on board, Jim handled all the data. He let ministers fill out their own information, and it was all over the place. Nothing was consistent. Paula reviews how she can use keywords to remove these and avoid future discrepancies.

Keywords represent data used repeatedly in Ministry Scheduler. This simplifies data entry and eliminates the possibility of spelling errors and inconsistent usage.

We'll talk about some of these keywords along the way, but to get started, Paula needs to add the ministry names used at Saint Mary's, any classes or groups, and any reasons a minister might be away and unable to serve.

Paula can list her ministries right off hand (outreach, hospitality, youth, and so on), but she's not sure about "class/group". Well, this can be anything you need it to be. If you use some kind of classification or grouping to identify your ministers, you can enter those "tags" to use on minister records.

Saint Mary's music ministry has two bands that several ministers and volunteers sing or play for. In the Class/Group keyword list, Paula enters "Rock of Faith" (the group that leads the congregation in singing hymns in a contemporary style) and "Traditional Cantors" (who chant in Latin during mass with organ music in the background).

When she adds those ministers' records, she can tag them as being in one or both of the bands. She can then use this information in reports, which we'll see how to do in Unit 7.

What ministries does your parish have?

_____   _____

_____   _____

_____   _____

_____   _____

Do you have any other groups? Are those groups within your ministries or separate from them?

_____   _____

_____   _____

_____   _____

To add a keyword

1. On the File menu, click **Keywords**.

2. Select a keyword category.

3. Click **Insert**.

4. Enter a name for the keyword. To move to the next field, press **Tab** or **Enter** on your keyboard.

5. Click **Save/OK** > **Close**.

> **Warning**
>
> If you change a keyword, that keyword changes on any records that use it.
>
> For example, in the Email Description Names keyword list, you change the keyword "Home" to "Personal". All records that had the email description keyword "Home" now display "Personal".

As Paula adds keywords, she realizes some of them are very similar. In her Ministry Status Names list, she has "Actively Involved" and "Active Member".

Instead of changing or deleting a keyword, Paula likes the idea of combining them. This way, she can quickly replace one keyword with the other.

To combine keywords

1. On the File menu, click **Keywords**.

2. Select the keyword category of the keywords you want to combine.

3. Click **Combine**.

4. On the left, select the keyword you want to change on existing records. (This is the one you don't want to see anymore.)

5. On the right, select the keyword it should be changed to on existing records. (This is the one you want to keep in the list.)

6. Click **Add to List of Changes Below**.

7. When you're ready, click **Combine/OK**.

Now it's your turn

Paula adds a new phone description of "Work" in the Phone Description Names keyword list. On Ana's record, Paula selects **Work** and enters Ana's work number. Later, Paula decides to change the "Work" keyword to "Work Phone".

1. What does Ana's record now show as the description for her work number?

   _____

Paula pulls in the minister information from her old files. She notices that she has "Office Phone" and "Work Phone" keywords in PDS. On Ben's record, she had selected **Office Phone** as the description. Paula combines the "Office Phone" keyword with the "Work Phone" keyword as follows:

2. What does Ben's record now show as the description for his work number?

   _____

Paula then deletes the "Work Phone" keyword from the Phone Description Names keyword list.

3. What shows on Ana and Ben's records beside their work numbers?

   _____

✳ Set Up Emailing and Text Messaging from PDS

In a product demo, Paula heard that she can send emails and text messages from Ministry Scheduler. To do that, she needs to set up her email server and the cellular providers her ministers use.

You can get information about your email server settings from your system admin or Internet provider. Contact the cellular provider for their server information.

To set up your email server

1. On the File menu, click **Setup** > **Email & Text Setup**.

2. On the Email Server Setup tab, enter the technical information for connecting your email server.

   - **Email Server (SMTP)** – This is your Simple Mail Transfer Protocol.

   - **Email Server Port** – The default is 25.

   - **Server Requires Authentication** – Select this if you have to log in to your email server. Enter your email account name and password. Select which email server you use.

   - **Server Limit Emails** – Select this if your server restricts the number or size of incoming and outgoing email messages.

   - **If an Error Occurs, Delay 30 Seconds and Retry Once** – If your email server experiences an error, you can request that PDS try to resend after a 30-second delay.

   - **Sending Emails from a Record** – Select whether to open your default email program or the simple email dialog when sending an email within PDS. If you're OnDemand, we recommend the simple email option.

3. When you're finished, click **OK**.

To set up text providers

1. On the File menu, click **Setup** > **Email & Text Setup**.

2. On the Text Message Provider Setup tab, review the list of text providers. By default, the information for most providers displays.

3. If you need to add one that's not in the list, click **Insert** and enter the information from the provider.

4. If you want to add these to the Phone Type keyword list, select the check box. If selected, you can quickly select the Provider Type keyword when adding minister contact information.

5. When you're finished, click **Save**.

Unit 2: Adding Your Masses

Now that Paula has some of the program options set, she can add her masses. Some occur daily or weekly, and some happen during special events once a year.

At the end of this unit, you'll be able to:

- Set the word your parish uses for masses
- Define the 3 mass types and identify the differences between them
- Add records for your masses so you can schedule them
- Remove a mass from scheduling without deleting it

✳ Set a Word for Labels

During the product demo, one of the things Paula was concerned about was how PDS used the word "mass" instead of what she's used to. Not to worry -- there's an option for that!

You can change the word that displays in Ministry Scheduler to anything you want. The name you choose shows up in several locations, including buttons and fields. Since Saint Mary's uses the word "liturgy", Paula selects that term, then clicks through Ministry Scheduler to see where it shows up.

Figure 2-a. Section labeled Liturgies instead of Masses

To change the term

1. On the File menu, click **Setup** > **Mass Labels**.

2. Select the terms you want to use, or enter custom names to use.

3. Click **Save/OK**, then click **Close**.

For the purposes of this training manual, we'll use "masses".

✳ Add a Mass

Paula looks at her list of masses and notices she has a few different types that occur:

- Every week at the same time on the same day
- At the same time throughout the week
- Only once a year for a holy day or special celebration

Define Mass Types
In PDS, these "types" are known as permanent, daily, and special masses.

Let's review what each of those means.

A permanent mass occurs at the same time, on the same day, every week. Use this type for Saturday evening and Sunday masses.

Figure 2-b. Example of a permanent mass

A daily mass typically occurs at the same time on one or more days of the week. For example, Saint Mary's holds Confession at 4:30 every Tuesday, Friday, and Saturday.

Figure 2-c. Example of a daily mass

A special mass is a holy day or celebration that has a specific date and typically does not recur within a calendar year. For example, Saint Mary's celebrates a special Christmas Midnight Mass.

Figure 2-d. Example of a special mass

To add a permanent mass

1. On the Information tab, click **Masses**.

2. At the top, click **Add Mass**.

3. Select the **Permanent** mass type.

4. Select the day of the week when the mass occurs.

5. If the mass only occurs on certain weeks of the month, clear the check boxes of the weeks the mass does not occur.

6. Enter the time when the mass occurs.

7. Enter a name or select to use the day and time as the mass name.

8. Click **Save**.

To add a daily mass

1. On the Information tab, click **Masses**.

2. At the top, click **Add Mass**.

3. Select the **Daily** mass type.

4. Select the day(s) the mass is celebrated.

5. Enter the time when the mass occurs.

6. Enter a name or select to use the day and time as the mass name.

7. Click **Save**.

To add a special mass

1. On the Information tab, click **Masses**.

2. At the top, click **Add Mass**.

3. Select the **Special** mass type.

4. Enter the date of the mass. Click **Special Date** to select a date from your calendar.

5. To add this special mass for following years, select **Automatic set the date every year**.

6. If this mass occurs during a regularly scheduled mass and it needs to replace that one, select the scheduled mass in the **Replaces** drop-down list.

7. Based on your needs, select or clear **Consider the Only Schedule Preferred Masses for Ministers Assigned to this Mass**. If selected, ministers who are only scheduled for preferred masses are not considered for scheduling during this mass. If cleared, all ministers (including

those who only want to be scheduled for their preferred masses) are considered for an assignment during scheduling.

8. Enter the time when the mass occurs.

9. Enter a name or select to use the day and time as the mass name.

10. Click **Save**.

Now, you need to add ministries for each mass. This lets the scheduler know which ministers should be assigned to this mass.

To add ministries for a mass

1. Locate the mass, and go to the Primary Information window.

2. Below the Mass Ministry grid, click **Insert**.

3. Select the ministry, and enter the number of ministers needed for this mass.

4. If needed, select a class/group for this ministry.

5. Click **Save**.

Now it's your turn

1. What information do you need when adding a mass?

   _____

   _____

2. Add a record for Saint Mary's Christmas Midnight Mass. It requires 4 Altar Servers, 2 Eucharistic Ministers, and 2 Lectors. (You can see how the record looks in the Answers section at the end of this manual. But don't peek until you try it!)

✱ Remove a Mass from Scheduling

Paula added a Special Sunrise Easter Mass at 6:30 AM. This conflicts with the regular Sunday morning mass at 7:00. For Easter Sunday, she can mark the regular mass inactive so it isn't included in the scheduling process. Ministers are not assigned to inactive masses.

> **ⓘ Warning**
>
> Never delete a mass record to prevent it from being scheduled.
>
> When you delete a mass, you break the association between the minister preferences and the now non-existent mass. So the preferences in all the ministers' records are also deleted. By inactivating it, you keep that link.

To mark a mass inactivate

1. On the Information tab, click **Masses**.
2. Locate the mass you want to remove from the schedule.
3. Select the **Inactive** check box.
4. Click **Save**.

When she's ready for the regular Sunday mass to be considered for scheduling, Paula can reactivate it.

To reactivate a mass in the schedule

1. On the Information tab, click **Masses**.
2. Locate the mass you want to restore and include in the schedule.
3. Clear the **Inactive** check box.
4. Click **Save**.

Unit 3: Adding Records for Your Ministers

In different spreadsheets on her computer, Paula has lists of ministers and which days and times they can and cannot serve, which services they like to serve, vacation times and days off, and other details. She's so ready to get this data in one place, organized in a way that she can efficiently manage them.

By the end of this unit, you'll know how to:

- Create a record for a minister and add his/her contact information
- Set preferences the minister has for types of masses, ministry, and times of day
- Select options to determine how ministers should be scheduled

Add a Minister

In Ministry Scheduler, each minister has a record where you can track all of their information, including:

- Contact information
- Interactions through letters, calls, or visits
- Assignments
- Days the minister can't serve
- Masses the minister prefers to serve

To add a new minister

1. On the Information tab, click **Ministers**.
2. At the top-right, click **Add Minister**.
3. Make sure the minister doesn't already have a record.
4. Click **Add New Minister**.
5. Enter the minister's contact information.
6. Click **Save**.

We'll talk about the other places you can enter minister information in just a minute.

Now it's your turn

1. Add **Steve Redmond** as a minister. Fill in the following information:
   - Address: **455 Pleasant Way Florence, SC 29501**
   - Home phone number: **(843) 555-4324**
   - Cell phone number: **(843) 555-7897**
   - Email address: **s.redmond@parishdata.com**

We'll include more information about Steve throughout this unit.

Copy a Minister's Record

A few ministers share some of the same information, like Estelle (the family minister) and Steve (the outreach minister) who are married. Instead of entering the same data for each person, Paula can copy it from an existing minister's record to add a new one.

Hmm, this feels like déjà vu… Paula remembers seeing something about copying minister data when she was setting up PDS. Good memory! Let's go back to those settings on the File menu.

To set which minister data to copy

1. On the File menu, click **Setup** > **Minister Data to Copy**.

2. Select the data field(s) you want to copy from an existing minister record to a new one.

3. Click **Save/OK**.

Once you set the data to copy from one record to another, you're ready to add the minister.

To copy an existing minister's data to a new minister record

1. On the Information tab, click **Ministers**.

2. At the top-right, click **Add Minister**.

3. Make sure the minister doesn't already have a record.

4. In the list, find the minister record you want to copy to a new one.

5. Click **Use This Minister Info**. A new record is added with the selected data copied from the existing minister.

6. Enter any additional information about the new minister.

7. Click **Save**.

Pull In a Member from PDS Office
If you work in any of the PDS Office programs, you can pull in an existing record to add as a minister.

To add a minister from a PDS Office program

1. On the Information tab, click **Ministers**.

2. At the top-right, click **Add Minister**.

3. Make sure the minister doesn't already have a record in Ministry Scheduler.

4. Click **Show PDS Office Members**.

5. The first time you set this up, browse to the location where your PDS Office data files live. For example, "C:\PDS\Office\Data".

6. In the list, locate and select the PDS Office member you want to add to Ministry Scheduler.

7. Click **Use This Member Info**.

8. Select which member information you want to include in the new minister record, and click **OK**.

9. Enter any additional information you want on the new record.

10. Click **Save**.

✳ Insert Special Characters and Symbols

Manuel Díaz is the minister who organizes music for Rock of Faith and the Traditional Cantors groups. Paula has known Manny since he was 4-year-old, and is good friends with his parents. He has always had a God-given gift for music.

She wants to enter his last name with the proper accent mark over the 'i'. Usually when she needs an accented character, she opens a new document or searches the web for it. Instead of trying to copy and paste it, there's a quick, convenient way to add it within PDS.

Right-click in any name field, and click **Insert Symbol**. Click a character to insert it in the field.
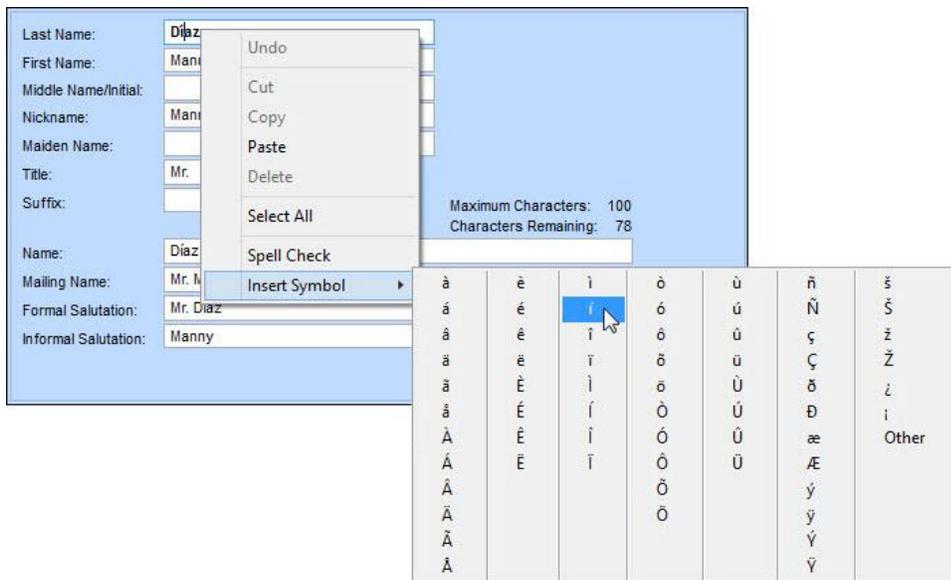
Figure 3-a. Symbols in the right-click menu

Do any of your minister or mass names have special characters? If so, write them here.

_____

_____

_____

_____

_____

Determine How Ministers Are Scheduled

We're going to talk about scheduling in the next unit, but there are some options on the minister's record related to scheduling.

Let's look at how Paula can edit a minister's record to determine how they are scheduled.

Remove Ministers from Scheduling

Sometimes, things come up that no one can control. Last year, Joan Byars (the administrative assistant), lost her husband suddenly to a heart attack. Joan had so much to do in such a short time.

In cases like this, Paula needs to make sure the minister isn't assigned to serve.

To remove a minister from scheduling

1. On the Information tab, click **Ministers**.
2. Locate the minister's record.
3. In the left navigation pane, click **Assignment Options**.
4. Select **Do Not Schedule**.
5. Click **Save**.

When the minister comes back, Paula can easily clear the **Do Not Schedule** option.

But wait… Paula pauses, remembering that there's an **Inactive** option on minister records. *So how is this different from marking the minister Inactive?* Inactivation is a more permanent option, whereas the Do Not Schedule option is temporary.

Let's look at some examples of when to use each option.

Now it's your turn

What should Paula do in the following situations?

1. Steve is going out of the country for a mission trip, but can't give details due to the sensitive nature of the mission. Paula isn't sure when he'll be back.

    ○ Mark Steve's record as inactive   ○ Select the Do Not Schedule option on Steve's record

2. Evan Wagner, a volunteer, is moving to another state and will no longer be able to serve at Saint Mary's. Paula wants to keep his information.

○ Mark Evan as inactive   ○ Do Not Schedule Evan

3. Debbie's 98-year-old mother is very sick and has been moved to hospice care. Debbie needs to take some time off to spend with her mother.

○ Mark Debbie as inactive   ○ Do Not Schedule Debbie

Rotate Ministers Between Masses

You may prefer that ministers serve a different mass from the last one they served.

To rotate a minister between masses

1. On the Information tab, click **Ministers**.
2. Locate the minister's record.
3. In the left navigation pane, click **Assignment Options**.
4. Select **Serve Different Mass from Last Served Mass**.
5. Click **Save**.

Restrict How Many Times Ministers Can Serve

You may want to restrict the number of times a minister can serve during a week or month.

To set the number of times a minister can serve

1. On the Information tab, click **Ministers**.
2. Locate the minister's record.
3. In the left navigation pane, click **Assignment Options**.
4. Enter the number of assignments a minister can serve each week. These number options come from the Max Number Assignments Per Week setting in the Initial Setup window.
5. If you only want them to serve a certain number of times per month, select that option and enter the number. These options come from the Max Number Assignments Per Month setting.
6. If you don't want the minister to serve the week after they last served, select **Do Not Schedule Consecutive Weeks**.
7. Click **Save**.

We'll talk about the Direct Assignments section on this window in a little while.

✴ Set the Types of Services Ministers Can Serve at Certain Times

Paula added Steve as a minister a little while ago, but there's other information still missing. Paula clicks through the links in the left navigation pane. She comes across the Type & Time Availability window.

Most ministers generally don't serve after midnight. But there are times like the Christmas Midnight Mass where ministers would be willing to serve.

You can set a minister's time availability for each type of mass here.

To set a minister's service types

1. On the Information tab, click **Ministers**.

2. Locate the minister's record.

3. In the left navigation pane, click **Type & Time Availability**.

4. By default, the **Available to serve** option is selected for all mass types. Clear this option if the minister is unavailable to serve a certain mass type.

5. If a minister can serve a mass but is unavailable at certain times, you can enter them in the grid.

   To quickly enter times, click **Quick Enter Type & Time Availability** and follow these steps:

   - Determine when morning, afternoon, evening, and night start, and click **Apply**.

   - In the grid, select the time periods the minister is unable to serve.

   - Click **Yes** to use this setup for the current minister.

6. Click **Save**.

✳ Set Dates When Ministers Can and Cannot Serve

Remember how Ana can't serve Mondays or Wednesdays? Here's where Paula actually sets those Cannot Serve Days. She can also set certain weeks ministers are unable to serve and add dates when ministers will be away.

To set date restrictions for a minister

1. On the Information tab, click **Ministers**.

2. Locate the minister's record.

3. In the left navigation pane, click **Date Restrictions**.

4. If needed, select any days of the week the minister cannot serve.

5. If needed, enter the dates and reason the minister will be away.

6. If needed, select any weeks the minister cannot serve. If the minister can only serve odd or even weeks of the year, select that option.

7. Click **Save**.

✎ *Now it's your turn*

1. Steve is going to be away on a mission trip (not affiliated with Saint Mary's) from December 5 through 10 of this year. Where does Paula need to set these dates Steve will be away?

   _____

   _____

2. On Steve's record, add the dates he will be away.

✳ Set Who a Minister Can Serve With

Paula can set options for each ministry the minister serves.

Also Assign to Ministry
She can select a ministry that the minister can perform during the same mass. For example, Steve is primarily the outreach minister, but he can perform lector duties during the same mass. So, on Steve's record under the Outreach ministry, Paula marks that Steve can serve as a lector for this assignment.

Class/Group
Paula sees the Class/Group field. This seems familiar… oh right, that's what we added keywords for earlier! She clicks the drop-down arrow, and sure enough, there are the two music groups Paula added. When scheduling, Paula can use this field to assign only servers of a particular class or group to a mass.

Family Mode
Since Steve and Estelle are married, they're considered a family. Paula can decide how family members serve. For each ministry, family members can serve together, or they can alternate so only one member serves in the ministry at a time.

Alternatively, you can use the Serve With list, which we'll see in a moment. If you use this list, set Family Mode to **None** for best results.

Number of Ministers Serving
If Paula always wants multiple family members to be scheduled together, she can create a single record that represents the couple or family. For example, Paula can schedule "Steve & Estelle" or "The Redmond Family" instead of each one individually.

In order for the scheduler to know that a record represents multiple people, you can enter the number of ministers serving on the record. Up to seven people can serve together per ministry.

Serve With List
Paula knows that Ana and Ben like serving together. However, they're not a family (not yet anyway… Paula expects an engagement announcement any day now). So she can't group them as a family, but she can let the scheduler know to assign them together when possible.

When you add someone to a minister's Serve With list, you're prompted to add that minister to the other person's Serve With list as well. Convenient!

Substitute List
When Steve leaves for his mission trip, volunteer Perry Caldwell has agreed to take on his assignments. Paula can set Perry up as a substitute on Steve's record.

To set serving options for a minister

1. On the Information tab, click **Ministers**.

2. Locate the minister's record.

3. In the left navigation pane, click **Serving Options**.

4. On each ministry tab, select serving options for that ministry.

5. If this minister prefers to serve with someone, add that minister to the Serve With List.

6. If another minister is able to fill in for this minister, add that minister to the Substitute List.

7. Click **Save**.

Paula thinks about the Serve With List again. But what if, for whatever reason, the parish doesn't want two ministers to serve together?

Well, she's in luck – just like the Serve With List, there's a Do Not Serve With List.

To add someone to a minister's Do Not Serve With List

1. On the Information tab, click **Ministers**.

2. Locate the minister's record.

3. In the left navigation pane, click **Ministry List**.

4. In the Do Not Serve With List grid, click the drop-down list and select a minister.

5. Click **Save**.

✳ Set a Minister's Preferences for Masses

We mentioned earlier that Debbie likes to serve at the 9:00 AM Sunday mass. This is where Paula can set those. Once she adds ministries on a minister's record, she can determine their preferences for masses.

To set a minister's mass preferences

1. On the Information tab, click **Ministers**.

2. Locate the minister's record.

3. In the left navigation pane, click **Mass Preferences**.

4. Each ministry the minister is involved in displays on a tab. On each tab, select the mass that the minister prefers related to that ministry.

5. Optionally, assign a different mass to the minister. This means the minister can serve this mass if their preferred mass isn't available.

6. If the minister doesn't prefer a mass, insert it in the Least Preferred Masses grid.

7. Click **Save**.

Now it's your turn

Now that we've completed Steve's record, let's add another one. This time, it's the family minister, who happens to be Steve's wife.

1. Add **Estelle Parker Redmond** as a minister using the following fields from Steve Redmond's record:

   - Last Name (since they're married)
   - Street Address (they live together)
   - First Phone Number (they have the same home phone number)
   - Away Periods (they're both going on the mission trip in December)

2. Complete Estelle's record with the following information. She's the family minister and sings in the choir. She is not available to serve on the first week of each month because she helps at the homeless shelter.

Action Plan

Whew, that was a lot of information! Let's take a short break to review. So far, we talked about setting up options, adding masses, and adding minister records.

Use the space below to write down:

- A list of tasks you need to do to set up PDS for your parish.

_____

_____

_____

_____

_____

_____

_____

- Questions you need to ask when you get back to the office, such as:

    "How does my parish determine which ministers are scheduled for each mass?"

    "What does the scheduling process need to know about how my parish's masses are assigned?"

    "What's the best way to find out when my ministers are available to serve?"

_____

_____

_____

_____

_____

_____

_____

- People you need to talk to and why. For example:

Name   Steve Redmond   Title   Outreach minister

-   Who can substitute for you when are away on a mission trip?
-   How many days per week can you serve?

Name _____ Title _____

-   _____
-   _____

Name _____ Title _____

-   _____
-   _____

Name _____ Title _____

-   _____
-   _____

Unit 4: Scheduling

Ben stops by Paula's office to pick up his assignments for next week. Paula leaves PDS to go back to her spreadsheet world for a moment. She looks through her files and emails to find Ben's schedule. It will be nice to have everything in one place inside Ministry Scheduler.

She prints it out and passes it to him. Before he leaves, Paula calls Ben back and prints another page. She hands him Ana's schedule and winks. He smiles and says he'll get it to Ana.

By the end of this unit, you'll be able to:

- Set up a schedule for one or more weeks
- Automatically assign ministers to their selected ministries on the schedule
- Assign ministers to a ministry on the schedule manually
- Test how a schedule will look without affecting minister records

✳ Understand How Ministers are Assigned

A schedule contains all the masses you added during a given date range. The scheduler must determine which ministers can serve each mass based on each minister's preferences that you set up earlier.

Here's how the scheduling process works, in a nutshell:

Sort the ministers by Last Served data

- Last Served dates should not be later than the period you're scheduling.

Create a list of minister with direct assignments

- Ministers with direct assignments come before those with the oldest Last Served dates.
- If the first minister in the list has a preferred mass, the Mass List is re-sorted so the preferred mass is the first possible mass to be assigned.

Check all the minister records individually

This step confirms that:

- The mass isn't on a Cannot Serve day or week or during a minister's away period
- The mass isn't one of the three least preferred and the mass type is permitted
- The minster's class is included for the mass
- A minister with the same family ID isn't already scheduled for another mass the same week
- The minister serves for an available ministry at the mass
- There is no violation of other scheduling rules involving consecutive weeks or odd/even weeks.

Assign each minister

- If the previous criteria are met, the minister is assigned the mass.
- For each minister, the masses in the Preferred Mass list are tested in order.
    - If any one of the tests fails and the minister is flagged as adamant about these preferred masses, no other assignments are attempted for that minister. He/She is removed from the pool of ministers for the week.
    - Otherwise, the minister is not flagged as adamant about serving at his/her preferred masses, and the next mass on the list is tested.
- This process continues until either the minister receives an assignment or all the available masses have been tested.

Paula feels a bit overwhelmed by the scheduling process, but she's happy to hear that she can schedule in test mode. That way, she can run a schedule without affecting any minister records.

Let's see how to add a schedule, then we'll talk more about how you can test it to make sure it's what you expect to happen.

Add a Schedule and Assign Ministers

Finally, the time has come. Paula's ready to try out this scheduling process.

To add a schedule and assign ministers

1. On the Information tab, click **Schedules**.
2. Enter the date that the schedule should start on and the date it should end.
3. Click **Next >**.
4. If you're scheduling multiple weeks, select whether to schedule each week individually or all weeks at once.
5. Select the week you want to schedule, and click **Next >**.
6. The scheduler works to schedule ministers for the required assignments. The results display.
7. Click **Next >**.
8. If there are any unfilled positions on the schedule, right-click it to manually assign a minister, if needed. If you need to replace a minister, right-click the minister's name.
9. When you're ready, click **Save Schedule**.
10. Click **Finish**.

5. If you're scheduling multiple weeks, select whether to schedule each week individually or all weeks at once.

6. For each week you want to schedule, select **Blank Week Schedule** on the right.

7. Click **Next >**.

8. The blank schedule displays. For each position column, right-click in the grid to assign a minister.

9. When you're ready, click **Save Schedule**.

10. Click **Finish**.

✳ Test a Schedule

As we've reviewed in previous units, many settings and options affect how ministers are assigned.

Since she's still new to Ministry Scheduler, Paula wants to run a schedule without touching those settings so she can see what happens. And if she decides not to keep that schedule, the minister records and settings won't be disturbed.

To test a schedule

1. On the Information tab, click **Schedules**.

2. Select the **Schedule Test Mode** check box at the bottom.

3. Follow the rest of the steps for adding a schedule.

If Paula is happy with the results of the test schedule, she can make it permanent. Once she does this, the scheduled assignments are applied to the minister records.

To make a test schedule permanent

1. On the Information tab, click **Schedules**.

2. In the Scheduled Weeks window, select **Show Test Schedules**.

3. Click **Make Test Permanent**.

4. In the dialog box, select the test schedule(s) you want to make permanent.

5. Click **Change/OK**.

6. Confirm that you want to make the test schedule(s) permanent.

7. Click **Close**.

✳ Assign a Minister Directly to a Specific Mass

Clara Quinn stops by Paula's office after choir practice. She volunteers at least once a week, and she wants to know if she can help this week. Paula has already made the schedule but can always find room for one more.

There may be times when Paula just needs to assign a specific minister to a specific mass without going through scheduling. For example, several volunteers can participate in certain masses. But Paula doesn't want them to take the primary minister assignments.

The best thing to do in this case is to add each volunteer as a minister and select **Do Not Schedule** (like we talked about in Unit 3). Then, Paula can add direct assignments when she needs volunteers.

To schedule a direct assignment

1. Find the minister's record.
2. In the left navigation pane, click **Assignment Options**.
3. In the Direct Assignments section at the bottom, click **Insert**.
4. In the grid, enter the date of the mass, the mass name, the ministry name, and any notes you need to know.
5. Click **Save**.
6. If you want to schedule a minister's direct assignments even if you selected **Do Not Schedule**, select **Only Schedule Direct Assignments**.
7. To overwrite any scheduling restrictions for a minister's direct assignments, select **Direct Assignments Overwrite the Scheduling Restrictions**. If selected, the scheduler disregards the number of max assignments per week and assigns a minister to the same mass and same date.

✎ _Now it's your turn_

1. Create a test schedule for the first 2 weeks of next month using the example masses we've added so far.

2. Make the test schedule a permanent schedule.

Unit 5: Communicating with Ministers

Communication hasn't always been the best at Saint Mary's. Back when Jim was in charge, he had a hard time keeping that "door of communication" open. It's not that he wasn't friendly – he was just overloaded with all the manual work of scheduling.

When Paula took over, she made it a top priority to listen to ministers' needs and keep them informed of the activities at Saint Mary's.

At the end of this unit, you'll know how to:

- Create a letter to send to ministers via mail

- Construct an email to send to ministers

- Set up a text message to send to ministers

- Allow ministers to view and change their scheduled assignments online

- Approve or deny online changes to minister assignments

✱ Send Letters to Ministers

Paula usually keeps in contact with her ministers via email, but every now and then, it's important to send an actual paper letter in the mail.

For example, she can send any of the following predefined letters:

- **Thank You for Volunteering Letter** – Thank ministers for being willing to volunteer.
- **Minister Away Period Confirmation Letter** – Confirm a minister's scheduled away time.
- **Letter and Minister Assignments** – List of assignments for specified dates.
- **Letter to Minister** – Write your own message to ministers.

Then there are some letters you can use to gather or confirm minister information:

- **Text Message Permission Form** – Collect cell phone information before sending texts from PDS.
- **Minister Online Information Letter** – Let ministers know log in information for the online app.

And you can always create your own letter from scratch. We'll go over reports in Unit 7.

✱ Send Emails and Texts

Saint Mary's is pretty tech-savvy. Paula works hard to get her ministers involved in tech-forward thinking. Most ministers read emails, so Paula's glad to know she can send them within PDS.

The music minister, Manny – who does everything on his iPhone – always asks Paula to text him with his weekly assignments. Before, it was a pain trying to type all that information on her phone. Now she can send it from PDS!

Anything that can be sent as a printed letter can be emailed. At the end of the report wizard (which we'll talk about later), you have several options on how to send the emails.
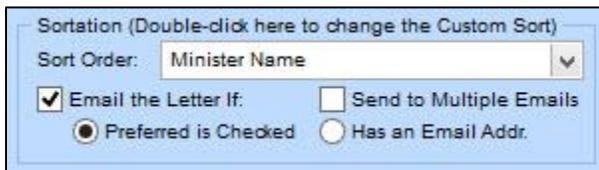
Figure 5-a. Email report options

You can:

- **Email the Letter If: Preferred is Checked** – Sends to ministers who have the **Pref.** check box selected in the Contact Information window.
- **Email the Letter If: Has an Email Addr.** – Sends to ministers who have an email address entered on their record.

If you select either email options, you can also send the letter to multiple addresses.

- **Send to Multiple Emails** – Sends to all the email addresses in the minister's Contact Information window.

We'll talk more about the rest of the steps involved with sending letters in Unit 7.

✱ Allow Ministers to View and Change Assignments Online

Several ministers have told Paula that they'd love to have an online schedule. Manny has mentioned this numerous times. Finally, Paula can set this up for them using the PDS Minister Web App.

Turn On App Options in PDS

First, Paula needs to turn on the app options. If she decides that the web app is not right for Saint Mary's or the ministers, she can always turn the options off so they don't display in Ministry Scheduler.

To turn on options for the minister app

1. On the File menu, click **Setup** > **Initial Setup**.
2. Select **Minister Online Access**.
3. Click **Save/OK**, then **Close**.

Set Up Online Login Credentials for Ministers

Paula knows some of her, we'll say "less tech-savvy" ministers won't use this, but she sets them up with logins, just in case. Who knows – maybe they'll get with the times!

After all, if Father Philip (who still uses a paper planner to keep up with his schedule) can do it, anyone can! Plus, it's a web app, which means ministers can log in from their computer, tablet, or phone.

And they all *at least* know how to use a computer.

Because the app allows ministers to make changes to their assignments, each one needs a log in.

To set up web app login credentials for a minister

1. Find the minister's record.

2. In the navigation pane on the left, click **Contact Information**.

3. In the Minister Online Information section at the bottom-right, click **Set Up**.

   TIP: If you don't see Minister Online Information, you need to turn on the app options.

4. The user name defaults to the first email address listed in the minister's record. If you change it in this dialog box, the email address on the record is updated.

5. The password defaults to the minister's first name, the initial of their last name, and their PDS ID number. You can change this if needed.

6. Click **Save**, then **Close**.

After you set up minister logins, you can send the letter we talked about earlier (under Minister Letter Reports). That way, your ministers know how and where to log in.

Upload Ministers and Assignments for Online View

Once all the minister logins are set up and the schedules are finished, Paula can send all of that to the app. This process uploads schedule information from today's date forward.

To upload assignments to the web app

1. On the File menu, click **Data Synchronization** > **Upload Ministers and Schedule Assignments**.

   TIP: If you don't see this process, you need to turn on the app options.

2. Read about how the process works, then click **Next**.

3. If you want to receive a notice when ministers make changes, enter an email address or use one from another area of Ministry Scheduler.

4. When you're ready, click **Upload**.

5. To print a list of the information that was uploaded, click **Yes**. Click **No** to exit the process.

 Now it's your turn

Paula prints out the list and realizes she's missing the hospitality minister, Gabrielle Fulton. She adds Gabby's record, sets up her login, and emails her the Minister Online Information Letter. The next day, Gabby calls and says she can't log in. She gets the message "The user name or password is invalid".

1. What did Paula forget to do to get Gabby's information on the app?

    _____

    _____

A few weeks later, the prayer minister, Debbie, drops by Paula's office and gives her new email address. Her account was hacked, so she needs to close it down. She is only going to use her new one going forward.

2. What 3 things does Paula need to do to make sure Debbie's email address is updated in PDS and on the app?

    a. _____

    b. _____

    c. _____

Using the Minister Web App

Paula is sure her ministers will have questions, so she decides to set up a quick meeting to go over how to use the web app.

After setting up credentials and uploading data, ministers can go to minister.parish.mobi on their mobile device or computer. After they log in, they can view and change their assignments.

Paula adds next week's schedule and uploads the information to the app. The next day, Gabby declines her assigned position as a lector. Since Estelle is also a lector, she sees that open assignment on her app, and she takes it.

Since she chose to be notified (during the upload), Paula gets an email. She can then accept or reject the changes that Gabby and Estelle made. Otherwise, if she did not want a notice, Paula would see the changes next time she ran the upload process.

Action Plan

We've gone over a lot so far! Since our last stopping point, we've learned how to set up mass schedules, assign ministers to ministries, and communicate with ministers in various ways.

Take this time to write down anything you need to before we continue on to the next unit, such as:

- What additional tasks you need to do when training is finished.
- Tips that you learned along the way.
- Areas or situations you still have questions about.

Unit 6: Viewing & Printing Information

Paula loves that she now has all of her information in PDS – one location instead of a bunch of separate spreadsheets. Now, let's see how she can view that information in the best way for her needs.

By the end of this unit, you'll be able to:

- View and print weekly schedules with minister assignments
- Publish schedules to your website for ministers to view
- Export your schedules to an Excel file

✱ View a List of All Your Masses, Ministers, or Schedules

Paula is still getting used to the idea of records in PDS. She has worked in spreadsheets for so long, and she misses seeing all the information together in one place.

Then, like magic, as she clicks through, Paula discovers the listing screen. It includes all the minister data in columns, just like her spreadsheet!

Figure 6-a. The Ministers Listing Screen

Curious, she clicks **Customize View** at the bottom. Paula can pick any fields from the records to view in her list. This will come in handy when Father Philip asks for specific information on all the ministers. Paula won't have to click through every record to find the answers. And she can even print it for him from this window.

There are listing screens for ministers, masses, and schedules. In the navigation pane of each section, click **Listing Screen**.

Here are a few helpful tips about listing screens:

- Inactive records and masses appear in red text.

- Old masses that have passed appear in blue.

- An ellipsis (…) at the end of an entry means you are seeing incomplete information. Hover over the ellipsis to view the complete information.

 __Now it's your turn__

1. In the Ministers listing screen, reorder the columns so the Street Address and City columns display immediately after the Minister Name column.

2. Add all minister email addresses and phone numbers to the listing screen.

3. Zoom the listing screen so it takes up the entire screen. Restore the window to its original size.

4. The width of a column can't be smaller than the column's _____.

5. Resize the Minister Email List column to 25.

6. Father Philip comes by Paula's office, huffing and puffing. *What is it today*, Paula wonders. He wants to know which ministers can substitute for daily masses, and he needs it right <u>now</u>. How can Paula get this information for him?

    a. Go to the minister _____ _____.

    b. Click _____ _____.

    c. Expand Minister > _____, and select the _____ field.

    d. Use the right _____ _____ to move the selected field to the "Fields you want to view" section.

    e. Use the _____ arrow button to remove any unnecessary fields from view.

    f. Click _____.

Print & Export Schedules

In Unit 4, we covered how to view the scheduled weeks and the details of a week. Now let's find out how to print those in an easy-to-read format and export them to other programs.

Print Scheduled Weeks
Some people (Paula's looking at you, Father Philip) still like a printed schedule to put on the wall.

To print a schedule

1. On the Reports tab, click **Schedule Reports**.

2. Expand **Listing Reports**.

3. Select a report based on your needs. Click the thumbnail image on the right to see what the report looks like with sample data.

We'll talk about the rest of the steps for printing reports in the next unit.

Father Henry, who's a bit more up-to-date with technology, wants to see the scheduled assignments in an Excel spreadsheet. This way, he can pull it up whenever he needs it.

To export a schedule to Excel

1. On the Reports tab, click **Schedule Reports**.

2. Expand **Export Reports**.

3. Select a report based on your needs.

We'll go over the rest of the steps for exporting a report in the next unit.

Display Schedules on Your Website

The web app we discussed earlier shows each minister his or her assignments. But what if ministers (or other staff) need to see everyone's assignments? Paula can publish a schedule to Saint Mary's website.

To create web schedules

1. On the Reports tab, click **Schedule Reports**.

2. Expand **Web Page Reports**.

3. Select a report based on your needs.

This is for viewing only. No one can make changes to online schedules.

Unit 7: Working with Reports and Letters

Paula relies on reports to keep her informed on everything happening at Saint Mary's. Until now, she created them in a word processor and had to fill in all the information she wanted by looking at her spreadsheets.

At the end of this unit, you'll know how to:

- Select, preview, and print a predefined report
- Build a custom report with the information you want to see
- Export data to a file you can use in a word processor, a spreadsheet, or another program

✳ Print a Predefined Report

Fortunately, PDS has numerous reports Paula can run with any or all of the minister and mass data she wants. And if none of the predefined reports fit her needs, she can modify a similar report or create a new one.

Pick Your Report

Paula can run reports with information on her ministers, masses, and schedules. There are different types of reports for each of these areas.

- If Paula wants to see a list of information, she can run a listing report. These reports show information from PDS in a grid format, so you can print things like a list of contact information for ministers, a list of preferred masses for each minister, a list of your schedules, and so on.

- To send a letter to ministers, Paula can run a letter report. And if she's mailing the letters (or any other report), she can print labels and envelopes.

- Ministers have another group of reports called Data Export/Quick Communication. These reports help you gather the information you need to send emails and text messages to ministers.

- Masses and schedules have a group called Export Reports. Use these to send information to an Excel file.

- You can use a Web Page Report to put your schedule on your church's website.

And if you don't see what you need, you can create your own! We'll talk about those in a moment. There are lots more. Look through these groups to become familiar with all the different reports.

To pick your report
1. On the Reports tab, click the type of report you want.
2. In the list, expand the report group you need.
3. Click a report, and you'll see a preview of it (with sample data) on the right.
4. If that's the report you want, click **Next** to continue through the report wizard.

Let's go over some things you may need to do before printing the report. These are steps in the report wizard.

Edit the Overview

All reports have an overview window that lists the report name and description, along with some layout and selection options you may have previously set.

Select Printer Settings

The next window in the report wizard is where you select your printer and page settings. Ask your network administrator if you have problems with printer settings.

Modify the Layout

Different reports have different layout windows. We'll look at these options later.

Select Which Records to Print

Paula picks the Mass Ministry Sign-Up Sheet report so the ministers can choose where they want to serve in the Christmas Midnight Mass this year. When she previews the report, she notices there are sign-up sheets for all the masses she has added.

Instead of printing all the masses and wasting paper, Paula can use the selection options to print the report for just the Christmas Midnight Mass.

The Selection window only displays options that are relevant to the report you selected.

Preview and Print

Okay, Paula has set all of her settings and selected all of her selections. It must be time to print this thing. But first, let's make sure we know what it's going to look like.

To preview and print your report

1. After making your selections, click **Preview** at the bottom.

2. Check your report.

3. To go back and change a setting, click **Back**.

4. Once you're happy with how the report looks, click **Print**.

✳ Build Your Own Reports

After printing the sign-up sheet, Paula looks for a report that lists the ministers, their ministries, and their email addresses. She can't quite find a report that fully covers this.

Copy and Modify an Existing Report

After searching the predefined reports, she finds that the Minister Ministry List is similar to what she wants, but she needs to print each minister's email address as well.

Paula can select the predefined report that *almost* meets her needs, copy it, then modify it to *exactly* meet her needs. The reports that you copy and modify in PDS are called Easy Reports.

To copy and modify an existing report

1. Locate and select the report you want to copy.

2. At the bottom, click **Copy**. A copy is added to the Easy Reports section under your report type.

3. With the copied report selected, click **Next**.

4. Edit the name and description, if needed.

5. Click **Next**, and follow the Reports wizard to define and customize your report.

To add the field she wants on the Minister Ministry List, Paula clicks **Modify the List of Fields to Print** on the Listing Layout window.

If you can't locate a report similar to what you need, add a new report.

Add a Custom Report

A tight fist thumps hastily on Paula's door. She'd bet money that it's Father Philip. Most people understand a closed door means no interruptions. It's not often Paula closes her door, but when she does, Father Philip is guaranteed to need something from her. Another knock-knock-knock shakes Paula from her thoughts. She rolls her chair over and turns the knob. Oh what a surprise, it's Father Philip.

He wants a report that lists each minister, the ministries they serve, and the number of assignments they currently have. Then, below that, he wants a list of the ministers and volunteers who can substitute for the minister as well as their ministries.

Since it's a bit complicated, Paula decides to create a custom report. Before she adds it, she outlines the information Father Philip needs and makes notes about the formatting she wants. This way, she has something to work from when creating the report.

To add a custom report

1. On the Reports tab, click the button for the type of report you want. For example, if you're adding a letter to your ministers, click Minister Reports.

2. Click **Add** at the bottom. The Add Report dialog box displays.

3. On the Simple Reports tab, click the type of report you want to create. A new report called "New <type> Report" is added to Easy Reports section of the group you selected.

   - For some reports (list and export reports, for example), the List of Fields to Print dialog box displays, and you can define the fields you want to include in your report.
   - For other reports (letter, label, and envelope, for example), the Editing window displays, and you can define the content of your correspondence.

4. Edit the name and description of the report. Select a report owner, and designate report access.

5. Save your changes, and continue the report wizard to print your report.

When adding a new report or copying an existing report, you have ownership of that report and can specify if only you and the administrator have access, if you want to share it but not allow anyone to modify it, or if everyone should be able to print and modify it.

Share Custom Reports
You can save your custom reports to a reusable storage device or hard drive to protect them from loss. You can also install your reports on other computers in your office or share them with other organizations that use PDS.

To save a custom report outside of PDS

1. In the Select Report window, select the report you created.

2. Click **Save as Custom Report**.

3. In the Save Custom Report Files dialog box, find the location where you want to save the report.

4. Enter a file name, and click **Save**.

After saving your report, you can send the file to a coworker, and they can add it into PDS using the Custom Report option.

To add an existing custom report into PDS

1. In the Select Report window, click **Add**.

2. Click **Custom Report**.

3. Locate the custom report file (.cr) you want to add, and click **Open**. The report displays in the Easy Reports section.

Export Data to a File

Paula is feeling good about Ministry Scheduler, but it may be a while before she can let completely go of her precious spreadsheets. That's all she's had up to this point, and they hold so much information – she can't just toss it all!

Luckily, Paula can export information to a word processor, a spreadsheet, Microsoft® Outlook®, Calendar Creator, or another program using export reports. Export reports are similar to list reports, but the data is sent to a file rather than a printer.

To define an export report

1. In the Select Report window, select the report category where you want to add the export.

2. Click **Add** > **Export**. The List of Fields to Print dialog box displays.

3. Select the field names you want to include and click the right arrow button to move them to **Fields you want to print**. Click **Save/OK**.

4. In the Overview window, click **Edit** to enter the report's name and description. If you have access to designate reports, select a report owner and report access. Click **Next**.

5. In the Export Properties window, click **File Format** to select one of the following file formats:

   - **Comma Separated Values (CSV)** — Creates a text file with data items separated by commas. This format includes headings.

   - **XML** — Creates an Extensible Markup Language file for sharing data on the web.

   - **Line/Form Delimited** — Creates a file with a line feed at the end of each field and a form feed at the end of each record.

   - **Line/Form Delimited With Headings** — Creates a file with column headings, a line feed at the end of each field, and a form feed at the end of each record.

   - **Tab Delimited** — Creates a text file with data items separated by tabs.

   - **Tab Delimited With Headings** — Creates a text file with column headings and data items separated by tabs.

   - **Fixed Width** — Creates a file that always prints the same number of characters for a field. So, if you print Org Name (75 characters)**,** Contact Name (30 characters)**,** and ZIP Code (15 characters), the file always contain exactly that number of characters for those fields. If it has more than these, it's clipped. If it's shorter, the length is filled with spaces.

   - **CSV Without Headings** — Creates a text file with data items separated by commas, but does not include headings.

6. Enter the name of the file you're creating.

7. To alter the list of selected fields, click **Modify the List of Fields to Export**.

8. Click **Next**.

9. Make any additional selections you want. Click **Build** to export the data to a file.

 __Now it's your turn__

Paula found out that her friend Nancy at Sacred Heart Church also uses PDS Ministry Scheduler. Nancy tells her about a cool report she created. Paula would love to print this report for her ministers.

1. How can Nancy save her report to share with Paula?

   _____

   _____

2. How can Paula add the saved report into her Ministry Scheduler report list?

   _____

   _____

Action Plan

Quick! Before you lose all those great ideas floating around in your head, jot them down here.
Write down any details you need to think about or things to do when you get back to your parish.

That's a Wrap!

We reviewed the basic functions of Ministry Scheduler. Soon enough, with practice, you'll be a pro.

There's still more that you'll discover on your own, and we'll be here to help you through that. There are several ways to get help with Ministry Scheduler.

- Review the Ministry Scheduler Help Guide at http://wiki.acstechnologies.com/display/PDSMS.

- Check out training opportunities at www.acstechnologies.com/products/pds/services/training.

- Call the PDS Support team at 1-877-737-4457.

- Consider attending the ACS Technologies Ideas to Impact Conference. You'll find much more than just classes on PDS products. There are strategical classes for enhancing your ministry, and you'll get to network with other users from all over the country. See http://ideastoimpact.com.

Additional Reference Information

During the limited time of this training class, we couldn't possibly cover every feature and option in Ministry Scheduler. This section includes information that you can refer to when needed.

Security

Father Philip is always asking Paula for information that's listed in PDS. To alleviate the frequent phone calls and visits from him, she can add Father Philip as a Ministry Scheduler user. This way, he can log in to PDS and view the information he needs.

And, since Father Philip doesn't need the ability to schedule ministers, Paula can set his rights to exclude the scheduling section of Ministry Scheduler. He only sees the sections Paula gives him permission to view. It's not that she doesn't trust him, but Paula is protective over her database and wants to keep it as clean as possible.

Using one of the security options in PDS is the best way to keep your data safe and clean.

Here's some important information you should know about security:

- When Ministry Scheduler is first installed, anyone can view and change data. While it's optional, we recommend that you set up user names and passwords to prevent unwanted changes.

- If you log in and leave your desk without exiting PDS, your computer doesn't know you're not there. Anyone at your desk can access your PDS information.

- When someone leaves your organization, do not assign that person's name and login to the person taking his or her place. Delete the old user, and add the new one.

- Who is in charge of security in PDS? If something happens to that person, do you have another way to access the security options and add, edit, and delete users?

To add a user and assign rights

1. On the Administration tab, click **Users & Passwords**.

2. At the top, click **Add User**.

3. Enter a user name for the person. This doesn't have to be their full name or real name. For example, Deborah might want her user name to be "Debbie". This is not case-sensitive.

4. If you require passwords, enter one for this person. This can be up to 10 letters and/or numbers and is case-sensitive.

5. Select whether this person is a security administrator. Admins have full access to all sections of Ministry Scheduler and can make changes to all data, including users and passwords.

6. If needed, enter a phone number.

7. In the grid, review each program area. The blue rows are main sections, and the white rows are specific windows or processes. If needed, click **Print Worksheet** on the left to view all of these.

8. For each program area, select an access option:

   - **No Access** – User cannot view any windows, processes, or reports.

   - **View Only Access** – User can view windows and records, and print reports, but can't add or delete information.

   - **All Access** – User can view windows, processes, and reports, and can add, edit, and delete information.

9. Click **Save** at the top.

Make sure at least one user you added, ideally the system administrator, has full access to the program before setting the security method.

To enable a security method

1. On the Administration tab, click **Users & Passwords**.

2. In the left navigation pane, click **Set Security Method**.

3. Select the security method you want. If you select to detect Windows or OnDemand authentication, the user name in PDS must match the name the user logs in to Windows or OnDemand with.

4. Click **Save/OK**.

✳ Back Up Your Data

Guarding against loss due to a natural disaster or database corruption is important.

OnDemand Backups
If you use OnDemand, your data is backed up automatically each night and stored on the server, so you don't need to schedule automatic backups.

Automatic Backups
Otherwise, you can set PDS Ministry Scheduler to perform backups automatically on selected days.

Before you set up automatic backups, make sure that:

- PDS is installed on the computer or server that stores the data.
- The computer or server is on at the time when the automatic backup is scheduled to run.
- All other PDS users are logged out.
- You entered your email address in the License Information window. If there's a problem with the backup, you'll get an email.

To set up automatic backup options

1. On the File menu, click **Backup/Restore** > **Backup Options**.

2. Select the day(s) you want to run an automatic backup of your data.

3. Enter the path for the location of your internal archive folder where your backups will live.

4. Select a level of protection for your data.

5. Click **Close**.

Paula sets her automatic update to run daily every week. When she starts PDS, she knows her data is captured, and she can restore her data to this point in time if she makes any big mistakes. However, she'd also like to back up her data before she makes major changes. She can run a manual backup at any time.

Manual Backups
Before you manually back up your data, make sure:

- You have at least 0.5 MB of free space on your backup media to complete the backup.
- You disable your computer's Hibernate, Sleep, or Stand By options.
- All PDS users are logged out.
- Your backup media is preformatted.

To back up your data manually

1. On the File menu, click **Backup/Restore** > **Backup Data**.

2. Enter a backup reason. This prints on the report and displays if you need to restore the data.

3. Select a backup method. You can:

    - **Back up to a selected drive** such as a floppy disk.

    - **Back up to a specific folder** such as the hard drive, CD-ROM, or any other drive.

    - **Back up to an Internet FTP Server** send the data to a website (File Transfer Protocol).

4. Select a backup location, or enter your FTP Server information.

5. Click **Start Backup**.

Answers

We'd hate to give you a bunch of questions and not give you the answers! Here are the answers to the questions in each section that pertained to Ministry Scheduler.

Unit 1

Set Up Options Used for Scheduling (Page 9)

1. Ana is scheduled because this is a special mass. Paula needs to enforce the Cannot Serve Days option for Special Masses under File > Setup > Scheduling Options.

Add and Combine Keywords (Page 12)

1. Ana's record now shows "Work Phone" as the phone number description.

2. Ben's record now shows "Work Phone" as the phone number description.

3. Nothing shows in the phone number description on Ana and Ben's records.

Unit 2

Add a Mass (Page 18)

1. When adding a mass, you need the type (permanent, special, daily), name, time, the day(s) or date the mass occurs, the ministries required for the mass, and the number of ministers needed.

2. Click **Add Mass**. For mass type, select **Special**. For name, enter "Christmas Midnight Mass". For time, enter "12:00 AM". In the Special Type section, enter 12/25 of this year. In the Mass Ministry grid, click **Insert** and enter "Altar Server" (add it to the keyword list if it isn't already there). Press **Tab** and enter "4". Click **Insert** and enter "Eucharist Minister". Press **Tab** and enter "2". Click **Insert** and enter "Lector". Press **Tab** and enter "2". Click **Save**.

    The finished record looks like this:

Add a Minister (Page 21)

1. To add Steve Redmond as a minister, click **Add Minister**. Click **Add New Minister**. For street
   address, enter "455 Pleasant Way". For city/state, enter "Florence, SC". For ZIP/postal, enter
   "29501". For phone number, enter "843 555 4324", and select the description **Home**. Press **Tab**.
   Enter "843 555 7897", and select the description **Cell**. For email address, enter
   "s.redmond@parishdata.com". Click **Save**.

Determine How Ministers Are Scheduled (Page 24)

1. Select the Do Not Schedule option on Steve's record
2. Mark Evan as inactive
3. Do Not Schedule Debbie

Set Dates When Ministers Can and Cannot Serve (Page 27)

1. Paula can set the dates in the Away Periods grid of the Date Restrictions window on Steve's
   record.
2. To add Steve's mission trip dates, locate his minister record. In the navigation pane, click **Date
   Restrictions**. In the Away Periods grid, enter **12/05/2016** in the From field, enter **12/10/2016** in
   the To field, and select **Mission Trip** from the Reason Away drop-down list. Click **Save**.

Set a Minister's Preferences for Masses (Page 30)

1. Before copying the minister, on the File menu, click **Setup** > **Minister Data to Copy**. Select **Last
   Name**, **Street Address**, **First Phone Number**, and **Away Periods**. Click **Save/OK**, then **Close**. On
   the Information tab, click **Ministers**. To add Estelle Parker Redmond as a minister, click **Add
   Minister**. In the list, locate and select **Steve Redmond**. Click **Use This Minister Info**. Click **Save**.
2. On the Ministry List window, insert **Family** and **Choir** into the grid. On the Date Restrictions
   window, select **First** under Cannot Serve Weeks.

Assign a Minister Directly to a Specific Mass (Page 37)

1. To create a test schedule, click **Add Schedule**. Enter the dates for the next two weeks or click-
   and-drag the next two weeks on the calendar. Select the check box to schedule in test mode.

Click **Next**. Select the automatic scheduling option, and click **Next >**. It's okay if there are incomplete assignments. Click **Next >**. Click **Save Schedule**. Click **Finish**.

2. To make the test schedule permanent, click **Scheduled Weeks** in the navigation pane. Make sure the **Show Test Schedules** check box is selected. Click **Make Test Permanent**. Select the weeks you added, and click **Change/OK**. When prompted, click **Yes** to continue. Click **Close**. In the Scheduled Weeks window, clear the **Show Test Schedules** check box, and you'll see the weeks you made permanent.

Allow Ministers to View and Change Assignments Online (Page 42)

1. Paula set up Gabby's login and let Gabby know her credentials, but she forgot to upload the new information to the app. Paula needs to go to File > Data Synchronization > Upload Ministers and Schedule Assignments, and upload Gabby's login information.

2. a. On Debbie's minister record, delete the old email address.

   b. Add the new email address.

   c. Under Minister Online Information, click **Set Up** and click **Reset**. (Then let Debbie know her new credentials.)

View All Your Masses, Ministers, or Schedules in a List (Page 46)

1. Click **Customize View**. In the Fields you want to view list, click **Minister Street Address Line 1** and click the up arrow button until the field is under Minister Orig Name. Click **Minister Street City** and click the up arrow button until the field is under Minister Street Address Line 1. Click **Save/OK**.   OR   On the listing screen, click-and-drag each column to the desired location.

2. Click **Customize View**. In the Fields available to view list, expand Minister - Detail, and click **Email List**. Click the right arrow button to add the field to the Fields you want to view list. In the Fields available to view list, click **Phone List**, and click the right arrow button. Click **Save/OK**.

3. On the listing screen, click **Zoom**. To restore the window, click **Zoom** again or click the X in the top-right corner.

4. The width of a column can't be smaller than the column's ___heading___.

5. To resize a column's width, click **Customize View**. In the Fields you want to view list, select **Minister Email List**. In Properties of the selected field, enter "25" for width. Click **Save/OK**.

6. a. Go to the minister ___listing___ ___screen___.

    b. Click ___Customize___ ___View___.

    c. Expand Minister > ___Substitute___, and select the ___Name___ field.

    d. Use the right ___arrow___ ___button___ to move the selected field to the "Fields you want to view" section.

    e. Use the ___left___ arrow button to remove any unnecessary fields from view.

    f. Click ___Save/OK___.

Unit 7
Export Data to a File (Page 54)

1. To save her report to share with Paula, Nancy needs to select her report in the Report list and click **Save as Custom Report**. In the dialog box, she can save the report to her desktop. From there, she can send it to Paula via email or on a flash drive.

2. To add the saved report into her program, Paula needs to save Nancy's report on her computer. Then in Ministry Scheduler, she can click **Add** in the Reports list, and choose **Custom Report**. Once she selects Nancy's report from the location where she saved it, she clicks **Open**, and the report shows up in her Easy Reports list.