

# the ZLC ministry scheduler™

*Software to plan, schedule, and communicate  
your church's ministry staffing.*

## USER'S GUIDE

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# Introduction

The ZLC Ministry Scheduler (ZMS) has been designed especially to simplify the task of scheduling people for the many parts of the service. There are three ways that ZMS will help you: tracking information about people, tracking your service's schedule, and putting those together to automate the staff assignments.

For the people, ZMS remembers which service days and times each person normally is available. It also remembers what positions they are trained for (or in-training for), and also any weeks coming up that they will not be available. It lets you specify a maximum number of automatic assignments per week, per month, and per quarter for each person plus for each separate ministry and service-time you sign them up for, and ZMS lets you track additional demographic information (to help you keep a good mix in assigning people to a service). Plus, ZMS lets you set up various types of Keep-Together (and Keep-Apart) groupings for the ministers.

For the services, ZMS remembers all of the "different" ways you may want to staff various types of services, and when you want them to happen. It stores your preferences on how to schedule each minister.

Then you tell ZMS to build your schedule for any range-of-dates and it stores that new schedule in "history" so you can always see or print any previous schedule that you've ever created. You can change any and all aspects of that schedule, then print it out using any of over two dozen formats supplied with the system. You can build your schedule in short pieces, when that is helpful, and then print out the finished schedule for the entire several-month period.

And when ZMS creates your schedule, and when you create a schedule you can choose to create an "empty schedule" – that is, one with no names assigned to the positions. Then you can use CHANGE to "pre-assign" certain people with special situations, then have ZMS finish the schedule by just filling in the remaining empty positions.

When you manually assign names (in CHANGE), ZMS helps you by presenting a Lookup List containing only the people who are available and designated for that position. That Lookup List also shows the Date-Last-Served and the demographic information.

The ZMS reporting is another very useful area, since it makes it very easy to select focused, informative reports and schedule printouts. There are many formats to choose from, and you can preview any report to the screen before sending it on to the printer. The service schedule can be printed for selected ministry types only, with several services across for large parishes that need a very condensed report. There are formats with larger fonts, and there are analysis reports that give instant counts per minister and per ministry.

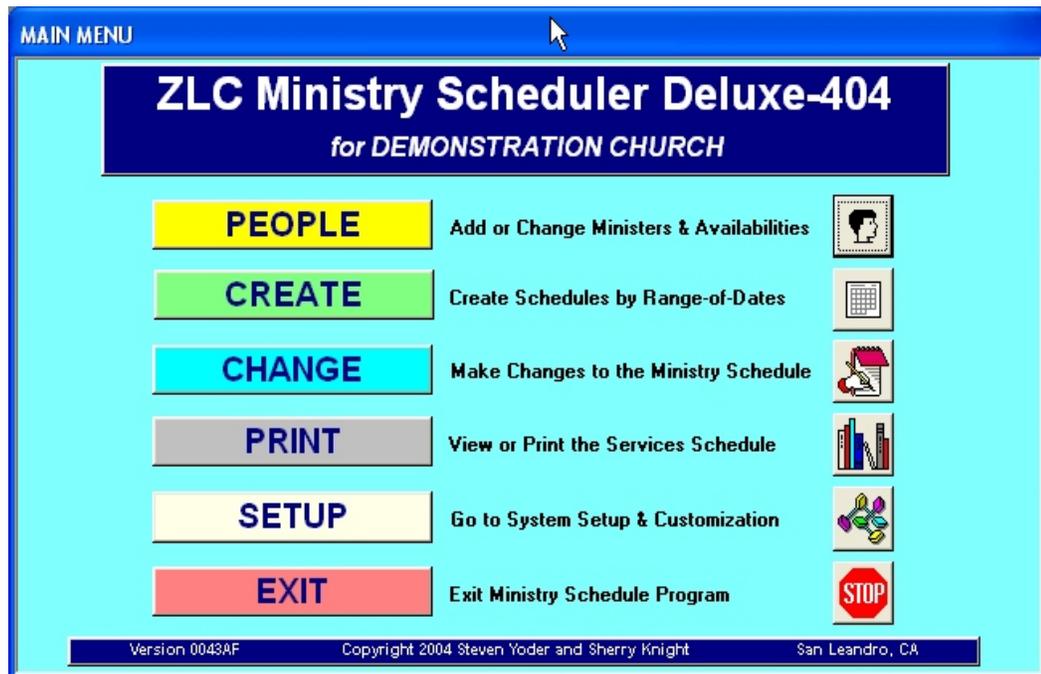
The ZMS system retains a history of your completed schedules and staffing. Since any report can be printed for any range of dates, the history is easily accessed whenever needed.

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ZMS was developed using Microsoft ACCESS, the leading database system for this type of program. This means that the system links very tightly to other Microsoft programs such as Word, Excel, and Outlook. It also means that if you have your own copy of ACCESS, then you can use it as a report-writer to create your own reports, if desired, or to adjust the ZMS reports.

You can run ZMS as a multi-user system very easily, so different people can set up different services, or even different parts of the same service.

The ZMS Main Menu



# 1 Installation and Registration

## Installation

ZMS is installed into your Windows system using an automatic Setup process. Once installed, you start ZMS by clicking on the icon created by Setup.

The installation should only take a couple of minutes:

1. Insert the ZLC CD into the appropriate drive.
2. The ZLC CD contains our programs in several versions of Microsoft ACCESS, and you should load the one appropriate for your version and level of Microsoft Office. If you do not have Office (nor WORD, nor EXCEL) at all, then just use the CATHOLIC\_SOFTWARE\_2000\_XP folder from our CD. If you have OFFICE 97 or older, then use the CATHOLIC\_SOFTWARE\_97 folder. If you have Office 2000 or later then use the CATHOLIC\_SOFTWARE\_2000\_XP folder on our CD.
3. To start the installation, go into your START-Programs-Accessories-Windows Explorer program. On the left side locate your CD Drive (after you've put the ZLC SOFTWARE CD into it you should see **ZLC Software** as the title of that drive in Windows Explorer). Click on the + to the left of that drive: a set of folders should appear, including CATHOLIC\_SOFTWARE\_97, CATHOLIC\_SOFTWARE\_2000\_XP, DEMOS, and SUPPORT. Click on the appropriate CATHOLIC\_SOFTWARE folder so its contents show on the right side of the screen, and then scroll down to find the file entitled SETUP.EXE -- it has a picture of a PC with some floppy diskettes, and it's file "type" is Application. Double-click on that SETUP.EXE file to start the SETUP process that will install the software.
4. Push <enter> for each question that appears to accept the default installation.

The default installation will place the program on your Drive C local hard disk. This is best for optimal performance. The installation also sets up ZMS linked to the Demonstration Data File, which can be used to familiarize users with the system, if desired. See Chapter 2 for linking (setting up) a new empty data file for your own data.

# 1 Installation and Registration

## Registration

ZMS requires an unlock code before the software will run. The first step in using ZMS is to register and obtain the unlock your software. You will receive a registration sheet enclosed with your CD and manual, or from ZLC via FAX or email.

The Registration Screen

Microsoft Access - [Register with ZLC]

File Edit Window Help

**ZLC SYSTEM ACTIVATION**

Date Trial System Will Expire:  Clear Date

Church Name: ZLCSOFTWARE

Unlimited Number of Ministers?

Enter UNLOCK CODE sent by ZLC: DXR.JXT-JXPFCC-XXHXJD

Register the System

As a Trial System this software will be fully functional until the above date. If you elect to keep the system, ZLC Software Corporation will fax you a new Unlock Code that will not have an expiration date.

Note that the Unlock Code is tied into the Company Name entered on this screen.

Form View NUM

### Unlock ZMS:

1. To register the software go the Setup screen from the Main Menu.
2. Click on the Register with ZLC Software button.
3. Follow the instructions on the registration sheet.  
Be sure to enter the registration name exactly as it is shown on the registration sheet.  
Also enter the unlock code exactly as it is shown on the registration sheet.
5. Be sure the Unlimited Number of Ministers box is:
  - a. Checked if you have purchased the unlimited capacity version.
  - b. Unchecked if you have purchased the 100 minister version.
6. Once you have filled in all the appropriate information click on the large Register the System button. If you get a message saying the package is not registered, go back over steps one through four to ensure the information is entered **exactly** as shown on the unlock code sheet. If the result of clicking the Register the System button is that you are returned to the Main Menu, then you are properly registered.
6. Once you have unlocked ZMS proceed to Setup.

# 1 Installation and Registration

## Multi-User Installation

All of ZLC's programs should be set up the same way for multi-user situations. They work the same way on Windows-for-Workgroups (3.11) networks, Windows 95, 98, NT, 2000, or 2003 networks, or on Novell networks. There are no special requirements for the file server, because all that happens there is that a single shared data file resides there (No ZLC programs should be running on the server).

For multi-user operation in a network situation, you must install the appropriate ZLC program file onto each user's station in the normal way, then link each station's program to the single shared data file on the file server. This arrangement allows each user to maintain his/her own selections and other temporary tables -- necessary for proper multi-user operations. The station requirements are the same as if it were being used to run the program stand-alone (single-user). These station requirements are the same as for running Microsoft ACCESS, since the ZLC programs all run using ACCESS.

Here are the actual steps needed to accomplish the multi-user installation. First, install the ZLC program onto each desired station from the CD-ROM or diskette set. Then copy from one of the stations to the shared hard disk (network file server) the data file to be shared (usually MSDATAxx.MDB). On each station start up the ZLC program, go into the SETUP screen, and use the "Change Company" button to tell the program where to find this shared data file (the path specification must always include a Drive Letter) and click on REATTACH (see Appendix B). After you get the "Successfully Reattached" message, you should exit the program. The next time you start it, you will be working in multi-user mode on that station. You can verify this by making a change on one station (and saving it) then going to another station to see the change reflected.

Finally, you may need to re-register the ZLC program, if the shared data file has not previously been registered. The registration information is stored in the data file, so each time you reattach to a new unregistered data file you must use the REGISTRATION-BY-FAX information sheet on that data file. If you reattach to a data file which was previously registered, then it will have that information already and will run appropriately.

## Multi-Company and Multi Site Operation

ZLC programs let you set up any number of separate data files, and switch between them using the "Change Company" button in SETUP. You are asked for the name of the .MDB file and its location (as a folder-path, including the drive letter), then the program will shift over to that specified data file. You can set up as many of these data files as you wish, as long as they are all at the same site geographically (for the same church). Using a ZLC program for multiple sites requires the appropriate multi-site license from ZLC Software Corporation.

## 2 Setup

### Setup

ZMS has been designed so that very little setup is needed in order to initially operate the system. The Setup screens are where you set up the Church's basic information such as name and address, where you set up the location of data files, and where you register the software.

Setup is also where you enter the descriptions for Ministry Types, Service Days and Times, Ministry Sets, Service Titles, Locations and Categories of People. These descriptions are used on “Lookup Lists” in the various functions throughout ZMS – both for ease of operation and for consistency.

### Basic information

The basic SETUP information is name and address. Please note that the name of the church **must** be filled in **exactly** as it is shown on the registration sheet, or the registration unlock code will not work.

The SETUP Screen

The screenshot shows the 'SETUP' screen with the following fields and options:

- Church Name:** DEMONSTRATION CHURCH
- Church Address:** 123 Avenue
- Church City:** San Francisco, CA, 99999
- Church E-mail:** (empty)
- Church Telephone:** (123) 456-7890, **FAX:** (123) 456-9999
- Default Service Title:** SERVICE
- Default City ST Zip:** (empty)
- Lookup List Maintenance:**
  - Ministry Types
  - Ministry Sets
  - Service Days and Times
  - Service Titles
  - Locations
  - Categories of People
  - Double-Click on any List to View / Change it...
- Options:**
  - Disable Auto-Checking?
  - Only One Assign?
  - Maximize the Screens?
  - Use Date-Calendar Lookups?
- System Settings (Right Column):**
  - Change Data Path
  - Register with ZLC Software
  - Clear NA Dates
  - Put Signups Into Roster
  - View Last Assigning Log
  - Log-1 Minister (dropdown)
  - Set ALL Mail? ON
  - Set ALL Mail? OFF
  - Set ALL Weeks ON
  - Set ALL Preferences to 5
  - Set ALL MaxPerWeek to 1
  - Set ALL MaxPerMonth to 99
  - Set ALL MaxPerQtr to 999
  - Set Blanks to ByNeed
  - Set Blank Max's to defaults

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### Other information on the Setup screen

#### Field title

#### What it does

Change Data Path

Tracks the location of the Church's data file. The data file contains all of the information you enter into the system, including both the ministers' and their schedules/history.

## 2 Setup

Field title \_\_\_\_\_ What it does

Normally Change Data Path is used only when the system is installed, or if you need to move the data file to a different PC.

### How to Connect to a New Data Set

1. Click on the Change Data Path button.



2. Enter MS97DAT7 in the Filename field - do not enter the .MDB extension (it will be attached to the file name automatically).

**Note: The MS97DAT7 file name may change when an upgrade is installed, requiring a conversion from the old data into the new datafile.**

3. Enter the data path on the second line in the format:  $\delta$ :\directory, where  $\delta$  is the hard disk drive where the data files reside, and directory is the name of the directory where the data files are stored.

**Note: ZMS comes connected to the Sample Data file. That filename is MS97X7. When ready to set up your own data connect to empty MS97DAT7 data file; do not use the Sample Data file for your live data.**

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4. Click on the Re-Attach button to complete the change over to the new data path. The cancel button when clicked reverts to the old data path.

**Note: that single data file you are attached to holds ALL of your information (ministers, preferences, history and setup), so that is the one file you need to “backup”. That is, you MUST keep copies (more than one) of that data file, in case anything happens to your computer or to the file in use. To do so you need only drag that file onto a floppy disk or onto a writeable CD – we recommend doing so at least once each scheduling period.**

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<u>Field title</u>	<u>What it does</u>
Only One Assign?	<p>Click on the box to allow the same minister to be assigned to more than one position in a service on the same day at the same time. For example, the greeter and the lector can be the same person at the Sunday 9 AM service.</p> <p>The assignment is a manual override that is entered after the ministry assignments have been generated automatically in the normal fashion. (Automatic assignment will never put one person in two positions at the same service.)</p>
Register with ZLC Software	See Chapter 1 Installation.
Clear NA Dates	This is a housekeeping function for the “not available” option in the Minister Availability Screen of each minister. When checked this function will clear out old “not available” dates on a system wide basis. The dates purged depend on the cutoff date entered here by the operator.
Any RED button	These are all support functions that should only be run when instructed to do so by a ZLC support person. They all have the potential of wiping out large parts of your existing data, so you should not run any of them without guidance.
Lookup List Maintenance	These lists contain the descriptions for Ministry Types, Service Days and Times, Ministry Sets, Service Titles, Locations and Categories of People.

The descriptions entered here are used on "Lookup Lists" in the various functions within ZMS. The Lookup List boxes save you typing, and also insure that valid data is set for each function to

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tie the operations together correctly.

There is no limit to the number of records that may be entered on each of these Lookup Lists.

List titles may not be changed, but the list content can be changed at any time, as needed. To delete a record from a list, it generally has to not be in-use – that is, if you have schedule history or people signed up to it, then you can change the spelling but not delete it.

### Add, change or delete Lookup List information (all lists)

#### Order of Lookup List Set Up

The following protocols must be followed when setting up the Lookup Lists.

1. Ministry Types must be set up before Ministry Sets.
2. Ministry Sets must be set up before Service Days and Times.
3. Services Days and Times may be set up only after the first two lists have been set up.

1. Place the cursor / arrow in the list you want to work on and double click on the mouse.
2. To **add** to the list click on the blank line at the bottom of the list and enter the appropriate information Click or tab to the next field and enter the appropriate information. When you exit that line, it will be saved automatically.  
  
**Note:** If you leave a "key" field blank or enter a duplicate value, you will get an error upon the Save. Use the Esc key to undo the error and the proceed.
3. To **change** the list click on the Title field you wish to change and type over the old information. Click or tab to the next field and change that information if it changed when the Title field data changed.
4. To **delete** from list click on the column to the far left of the line which contains the item to be deleted. Press the delete key, when the OK message appears press the Enter key.
5. **Multiple deletes.** You can delete a group from a list if the items are consecutively listed, that

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is, one follows the other.

Click on the “record selector” box at the far left end of the first item to be deleted.

Click on the last item to be deleted while simultaneously depressing the Shift key. All of the items will be highlighted.

Press the Delete key, and click on OK.

### 6. Instructions for setting up **Ministry Types**.



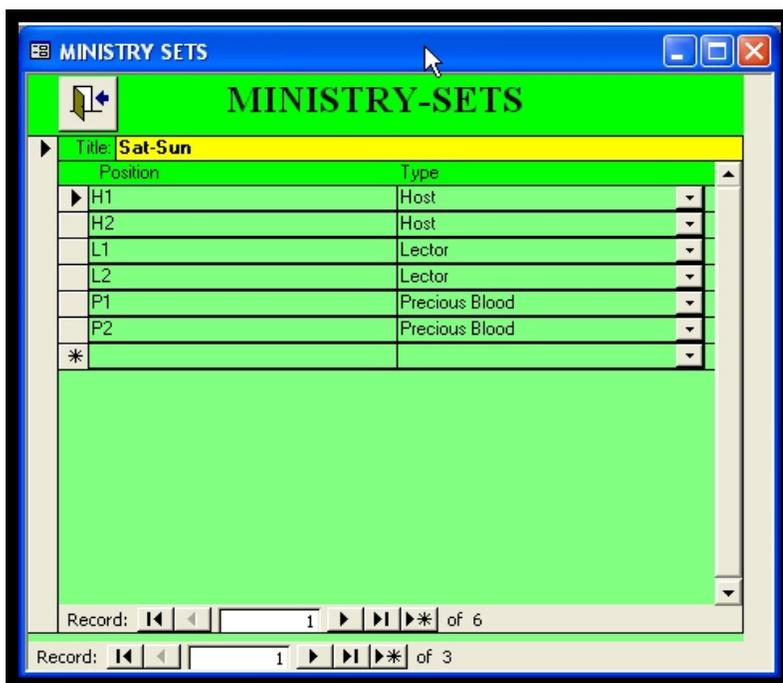
Title (must be unique)	Description of Duties / Function
Altar Server Code (for Rosters): A	
Bristol Manor Code (for Rosters): B	
Greeter Code (for Rosters): G	
Host Code (for Rosters): H	
Lector Code (for Rosters): L	
Precious Blood Code (for Rosters): P	
Usher	

This is a very simple list. You only need to fill in one box per record (the Title) – the other boxes are optional. You need to set up one row for each ministry **Type** you want to track – this can be just the usual ministries, or you can also include such things a counters, bread-bakers, linen people, and off-site service ministries.

The Code boxes are for you to use if you want to include a short code for each minister’s sign-ups on a one-line roster (to keep it a condensed report). There is a special function on the SETUP screen that will put these codes into the NOTES-2 field for each minister, if desired. Note that you must re-run this special function any time you have made changes to the ministers’ sign-ups.

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### 7. Instructions for setting up **Ministry Sets**.



Unlike the other Lookup Lists, the Ministry Sets involve a list within a list. Each yellow title bar above the green list of ministries represents one line of the "list" of yellow titles – but you only see one at a time: a “pages of a book” view.

You move between the yellow titles using the CTRL plus Page Up / CTRL plus Page Down keys (while the cursor is anywhere in the yellow box). Or, you can use the buttons at the **far** lower left corner.

You can thus set up as many different Ministry Sets as you may need for your various weekly and special services.

You enter as many green rows for each ministry type as you need for a service. If you need eleven eucharistic ministers, you can set up eleven green rows for that ministry – and each of those rows has to have a different and unique position code. If you do not use position codes already, you can simply make some up; the system needs them to differentiate between each of the positions.

If all of your services need the same setup, then you will only need one ministry set. If each service requires a different number of ministries, then you will want to set up a different ministry set for each of those services.

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### 8. Special Instructions for Service Days / Times (special services).

Title (must be unique)	Day	Time	Ministry Set	Sign-up Ministers
1. SAT 5	Saturday	5:00 PM	Sat-Sun	Ministers
<input type="checkbox"/> Use This Title?	Which Weeks? 1: <input checked="" type="checkbox"/> 2: <input checked="" type="checkbox"/> 3: <input checked="" type="checkbox"/> 4: <input checked="" type="checkbox"/> 5: <input checked="" type="checkbox"/>	Code:	<input checked="" type="checkbox"/> Active?	Add / Remove Ministers
2. SUII 8	Sunday	8:00 AM	Sunday 8	Ministers
<input type="checkbox"/> Use This Title?	Which Weeks? 1: <input checked="" type="checkbox"/> 2: <input checked="" type="checkbox"/> 3: <input checked="" type="checkbox"/> 4: <input checked="" type="checkbox"/> 5: <input checked="" type="checkbox"/>	Code:	<input checked="" type="checkbox"/> Active?	Add / Remove Ministers
3. SUII 10	Sunday	10:00 AM	Sat-Sun	Ministers
<input type="checkbox"/> Use This Title?	Which Weeks? 1: <input checked="" type="checkbox"/> 2: <input checked="" type="checkbox"/> 3: <input checked="" type="checkbox"/> 4: <input checked="" type="checkbox"/> 5: <input checked="" type="checkbox"/>	Code:	<input checked="" type="checkbox"/> Active?	Add / Remove Ministers
4. SUII 12	Sunday	12:00 PM	Sat-Sun	Ministers
<input type="checkbox"/> Use This Title?	Which Weeks? 1: <input checked="" type="checkbox"/> 2: <input checked="" type="checkbox"/> 3: <input checked="" type="checkbox"/> 4: <input checked="" type="checkbox"/> 5: <input checked="" type="checkbox"/>	Code:	<input checked="" type="checkbox"/> Active?	Add / Remove Ministers
XMAS VIGIL	Tuesday	5:30 PM	Sat-Sun	12/24/2002
<input type="checkbox"/> Use This Title?	Which Weeks? 1: <input checked="" type="checkbox"/> 2: <input checked="" type="checkbox"/> 3: <input checked="" type="checkbox"/> 4: <input checked="" type="checkbox"/> 5: <input checked="" type="checkbox"/>	Code:	<input checked="" type="checkbox"/> Active?	Add / Remove Ministers
*				
<input type="checkbox"/> Use This Title?	Which Weeks? 1: <input checked="" type="checkbox"/> 2: <input checked="" type="checkbox"/> 3: <input checked="" type="checkbox"/> 4: <input checked="" type="checkbox"/> 5: <input checked="" type="checkbox"/>	Code:	<input type="checkbox"/> Active?	Add / Remove Ministers

This is where you set up all of your service times, both weekly and special dates/times. ZMS is oriented towards assigning people on a regular, recurring schedule – i.e. where the services are the same every week. To handle your regular weekly services schedule you need only enter any Not-Available date ranges, then enter the range of dates to be scheduled and run the *Create* process. It is more complicated to handle additional irregular services, such as for holidays, feast days, weddings, etc. We will describe here some ways to build these services into your schedule.

First, you must decide whether you wish the program to schedule the people for the special services as part of the normal rotation? Or, as some churches have requested, do you want the special services to not affect the normal scheduling rotation? Each of these requires a different approach. We will designate the former as **Inside** the rotation, and the latter as **Outside**.

Second, it is useful for you to understand a few things about how the ZMS Create process works:

ZMS maintains its main rotation by going through the services to be scheduled in date-order, and looking at each Minister's history up to that point to determine their Last-Date-Served. In other words, if you ask it to go back into the middle of an existing schedule and assign people to a service there, it will assign those people correctly taking into account their history up to that point in time. The problem is that for an inserted service, the people it finds coming due for that

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inserted service are often the same people it previously scheduled for the next subsequent service. Thus, to have a non-weekly service peopled as part of the standard, usual rotation, that non-weekly service **must** have its ministers assigned **in sequence** as the *Create* process goes through the dates / times assigning names.

Also, you can have the *Create* process automatically create **all** of the services for its range of dates, or you can create some services beforehand – in the *Change* function – and have *Create* build the rest around what you have created. The Assign Names works the same way: it only fills in blank name-slots. Any you have pre-assigned it will leave in place and work around.

The key to controlling the automatic creation of services for your schedule is always the ACTIVE? X's in the *Setup–Service Days/Times* Lookup List. The X's tell *Create* which services to set up (plus to use the Ministry Set which you have specified for each). In addition, if (in Setup) that X'd *Day/Time* has a blank *Date* column, then it will be created on a weekly basis for the range of dates you are running. If there **is** a *Date* then that service will only be set up on that specific date. Note that the X's in Setup do not determine which services will have ministers' names assigned; that will be done for **all** of the services found in the range-of-dates: the X's only determine which services will be newly created by the CREATE process.

The X's in *Create* allow you to set up your services-schedule, with their Ministry-Sets, but without assigning any names. That allows you to then manually pre-assign some names, then run the *Create* process again – for the same range of dates – to have the remaining blank names assigned automatically. Note that the use of *Create* with just one X runs very quickly; and that it is the Assign Names part that can take a significant amount of time (depending on the number of services, the number of positions, and the number of keep-together groups involved).

Also note that the X's in *Setup–Service Days/Times* Lookup List control which services are included in the *Print* function. Check the *Days / Times Include?-List* on the *Print* selection screen: it will match your Setup.

### Inside – Special Services Inside the Rotation

You can set up your Special Services in *Setup--Days/Times* with a desired *Date*. Then when you use *Create* with a Range-of-Dates encompassing its *Date*, that Special Service will be automatically created along with the regular weekly services. Note that you must also have that desired service set to ACTIVE, have all of its WHICH-WEEKS checked, and have the appropriate Ministers signed up for it in their Availabilities screens (The ADD / REMOVE button here lets you easily sign up ALL ministers to a special mass, if that is how you want to do it. This is described in detail below).

There are other ways to do special services, usually requiring a few more steps. One way is to first have *Create* build an empty schedule of all of the services, including any desired special services (which creates extra instances of the non-weekly services). You must do this with only the top X (Set Up Ministry Positions) checked in *Create*, so no names are assigned at that point. Then in *Change* you can Delete the extra services it created, and go into Setup and turn off the

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X's on the non-weekly services. Finally, you return to *Create* to run the *Assign Names* process.

Alternatively, you can use *Create* to build only the regular weekly services (without assigning Names) then use *Change* to add any additional desired special services, one at a time. Then return to *Create* to do the *Assign Names* process.

Plus, there is a new function that lets you set up two identical days and times services, and mark just one of them as “Primary” – generally this Primary one would be a Special service with a single date specified, and you want it to take place **instead** of the usual weekly service. With this setup, when you run *Create* it will only create the Primary service and will skip the other one automatically.

### **Outside – Special Services Outside the Rotation**

For this, you should first just run the *Create* process for your regular weekly services, including have it *Assign Names*, before you set up the Special Services. Then you go into *Change*, and add into it the desired special dates / times. You can then go into *Ministers* for each of the added service(s) and manually assign any desired names (All services will be sorted into date and time order the next time you go into *Change*).

Or, you can simply set up the “Outside” service(s) and have them automatically created when you run *Create* – but you must not sign any ministers up to these services in the *People–Availability* screens. This will insure that no one will get assigned during *Create*, and you can go into *Change* later and manually set the assignments.

Note that when adding Services manually in *Change*, it will automatically take your selected Day and locate the first valid date after the date in the yellow date box. You can change the date in the yellow box before selecting the *Service Day/Time* for a new service.

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### Signing Up Ministers within Service Days/Times

Name	Add Service To Minister?	Include?	Max Per Month:	Notes:
Armonaitis, Linda		<input type="checkbox"/>	0	Notes: L*P*H*G*B*
Bagley, Dot		<input type="checkbox"/>	0	Notes: H*P*
Bransfield, Ken		<input type="checkbox"/>	0	Notes: H*P*
Bransfield, Mary		<input type="checkbox"/>	0	Notes: H*P*
Burke, Lorraine		<input type="checkbox"/>	0	Notes: L*B*
Cerro, Eleanor		<input type="checkbox"/>	0	Notes: H*P*
Connally, Kevin		<input type="checkbox"/>	0	Notes: L*
Convey, Pauline		<input type="checkbox"/>	0	Notes: H*P*
Corbo, Mike		<input type="checkbox"/>	0	Notes: L*

The newer versions of ZLC Ministry Scheduler have a new, powerful function in *Setup–Service Days/Times* for signing up Ministers to any particular service. It is much easier to use overall than using each Minister’s individual Details screen. To use it you select the service and click on its *Add/Remove* button; a special list of Ministers appears, with each showing an *Include?* and a *Max Per Month* number. At the top there are three buttons for setting the values, plus a larger button that implements the currently showing values.

The top setting-button goes out and looks up which ministers are already signed up, along with their Maximums. Then you can adjust those values and use the fourth button to send the changes to the Ministers’ details. For services just added (i.e. with no signups) you do not need to use the top button. Just set the values you want and then send them to the Ministers’ details. **Be sure to use the fourth button to save your changes into the *People* area, or else all your changes will be lost and not saved.**

## 3 Add or Change Ministers and Availabilities (PEOPLE)

### People

The People section of Ministry Scheduler is the area where information on the individual ministers is maintained. This is the function which initially sets up the person for a ministry assignment, and where any changes to that information are made. The information kept in People includes name, address, ministries performed, and so on. The three main functions of the People section are to (1) set up ministers; (2) establish families and groups which want to serve together or apart; and (3) print any "People Reports" (rosters, mailing labels, individuals' schedules, and others that are person-by-person reports).

### Getting around on the screens

There are a few basic mouse clicks and keystrokes you should know in order to move around easily on any screen in ZMS. Mastery of these keystrokes will help significantly in the operations of the program. For an expanded explanation see Appendix A.

1. **Exiting screens.** In the upper left hand corner of each screen (excepts reports) is an icon of an open door. Click on this icon to exit. Some screens will have the word Return on them; in that case click on the word to exit.
2. **Search.** Use this field when you want to work on the data for a specific person. Enter the first few letters, or more, of the person's name until the name you want appears. When the whole name appears press the Enter key. The program will then go to the first data field for that person.

Alternatively, with the cursor on the Search field screen, press F4 to see a list of ministers. Scroll down to the name you want and click on the name. The program will then go to the first data field for that person.

3. **Record buttons and arrows.** These items are located on the bottom left side of the screen. The first number shown indicates the record number the cursor is resting on. For example, in the List of Ministers screen the record number starts on the name field. The second number is the total number of records. Again using the List of Ministers screen as an example, it would be the total number of name fields in the system.

4. **Scrolling.**

**PgUp and PgDn.** To move quickly through a list use the PgUp and PgDn keys. Use of these keys located on the computer's keyboard moves the cursor through the information on the list one screen at a time.

**Ctrl + Home.** Simultaneously depressing these keys moves the cursor to the first data record for information shown on the screen.

### 3 Add or Change Ministers and Availabilities (PEOPLE)

**Ctrl + End.** Simultaneously depressing these keys moves the cursor to the last data record of the current list.

5. **Arrows.** Use of the directional arrows (up, down, left, right) located on the computer's keyboard moves the cursor from field to field, one field at a time.
6. **Tab.** Moves the cursor forward from field to field, one field at a time.
7. **Ctrl + Tab.** Moves the cursor back one field.
8. **Data fill.** Many fields have look-up lists which have been defined in Setup. Also, there are many search functions in Ministry Scheduler. Data fill is a method for entering this information using a shortcut. Simply enter the first letter(s) of the item and Ministry Scheduler will fill in the remainder as it identifies the letter(s). When the name or item you want appears press the Enter or tab key.

#### Add a Minister

1. From the Main Menu click on the **People** button.

Name	Notes	Notes2	Mark?	Mail?	Salutation	Tele-H	W	Email	Go to Details
Armonaitis, Linda		L*P*H*G*B*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	The Armonaitis Family	(123) 456-7890	(123) 456-7890	catholicsw@zlcsoftware.com	Go to Details
Bagley, Dot		H*P*	<input type="checkbox"/>	<input type="checkbox"/>		(123) 456-7890	(123) 456-7890	catholicsw@zlcsoftware.com	Go to Details
Bransfield, Ken		H*P*	<input type="checkbox"/>	<input type="checkbox"/>		(123) 456-7890	(123) 456-7890	catholicsw@zlcsoftware.com	Go to Details
Bransfield, Mary		H*P*	<input type="checkbox"/>	<input type="checkbox"/>		(123) 456-7890	(123) 456-7890	catholicsw@zlcsoftware.com	Go to Details
Burke, Lorraine		L*B*	<input type="checkbox"/>	<input type="checkbox"/>		(123) 456-7890	(123) 456-7890	catholicsw@zlcsoftware.com	Go to Details

2. From the **List of Ministers** screen click on the **Add** button.

### 3 Add or Change Ministers and Availabilities (PEOPLE)

3. Enter name, notes (if any), telephone numbers, extension.
4. Click on the **Go to Details** button. This takes you to the **Minister Availability** screen.

**Minister Availability**

Name: **Armonaitis, Linda** Last Served: Sat 12/24/2005

Notes1: Notes2: L\*P\*H\*G\*B\*

Home: (123) 456-7890 Birth Day: 0

Work: (123) 456-7890 Ext: " Mth: 0

E-Mail: catholicsw@zlcsoftware.com

Address: 123 Broadway San Francisco CA 99999

Gender: F Category: ENGLISH Age: 3

Which Weeks? 1:  2:  3:  4:  5:

Even Weeks-of-Year Only?  Odd Weeks Only?

Maximum # per: Week: 1 Mth: 99 Qtr: 999

Ministry	Status	Prefer.	Max-Mth	Qtr	Training Date
Bristol Manor	A	5	99	99	
Greeter	A	4	99	99	
Host	A	3	99	99	
Lector	A	1	99	99	
Precious Blood	A	2	99	99	
*	A	5	99	99	

Record: 1 of 5

**Services:** by Need  Rotate  Clear

Service Title	Max/Month	Qtr.	Day of Week	Time
1. SAT 5	1	99	Saturday	5:00 PM
2. SUN 8	1	99	Sunday	8:00 AM
3. SUN 10	1	99	Sunday	10:00 AM
4. SUN 12	1	99	Sunday	12:00 PM
XMAS VIGIL	99	99	Friday	5:30 PM
*	99	99		

Record: 1 of 5

**Dates Not Available:** Set Default

Date	Day	Date	Day
1/3/2000	Mon	1/9/2000	Sun
10/17/2001	Wed	10/23/2001	Tue
*			

Record: 1 of 58

- a. Enter information appropriate for the individual using the following guidelines.

If notes and telephone numbers were entered when the person was added in Step 3, they will automatically appear on the Ministry Availability screen. Conversely, if entered from the Minister Availability screen they will automatically be included on the List of Ministers screen.

- b. Enter address, city, state (two letters only), and zip code.

Note that if adding several ministers, you should stay on the Minister Availability screen and use the asterisk button at the lower left to create a new blank screen for a new minister. Or you can use the COPY button at the upper right to create a duplicate of the minister you are on; this is useful for family members living at the same address – you then need only change the name and the signup details. Note also that if you set the default city, state, zip in SETUP then adding using this screen will automatically fill in those fields, plus the Which-Weeks and Maximums.

### 3 Add or Change Ministers and Availabilities (PEOPLE)

c. Enter sex, category, age group, and birthday by selecting the appropriate designation from the look-up list. To select from the list use the F4 key, highlight the item with the mouse, and click; or, enter the first few letters, then press the Enter key when the name your looking for comes up. Any or all of these fields may be left blank.

d. **Maximum # of assignments.** These fields are required fields and must be filled in. You should normally start out with everyone set to 1, 99, and 99. Then only for special cases where you want to limit the assignments, you can change the 99's to 1 or 2 or 3 as desired.

**Week:** enter the maximum numbers of times this person may serve each week.

**Month:** enter the maximum number of times this person may serve in any month.

**Quarter:** enter the maximum number of times this person may serve per quarter.

e. **Dates Not Available**

This section is used to exclude dates the individual is not available to serve.

You can enter any date range on each line, whether the same date or three months. Or, you can shortcut manual entry and use the plus / minus key to automatically enter one week – first set the default date and the buttons will work from that date. Any, or all, of these rows may be left blank, but if used **both** date fields must be filled in. If you use Tab after you fill in the first date, the second date will be filled in with that same date, then if you need a different second date you simply type over that default.

f. **Ministries.** This section is used to set up the types of ministries a person may serve. This area requires at least one entry – each minister must be signed up for at least one ministry.

Using the mouse, click on the first line of the Ministry column. Enter the first few letters of the type of ministry desired. Or use the F4 key to show the list and select the appropriate designation.

Tab or click over to the Status column. Enter one of the following: A for active, I for inactive, T for in-training, or 0 for other. Or, use the F4 key to select the code.

**Max-Month/Qtr.** If this minister has more than one ministry you may change these columns (from 99) to limit the number of assignments of one ministry assignment versus the other(s). For example, if you only want this minister to be an occasional lector, but mostly to do other ministries then set Max-Month for lector to 1 (one) and leave the rest of the ministries at 99 per month. The Max-Per-Quarter is useful if you have people who are generally rotating at less than one assignment per month.

#### Date Range Guidelines

In the Ministry Schedule whenever a function asks for a range of dates, the to and from dates **must** be entered. When both dates are not entered the scheduling and reporting functions will not work correctly.

### 3 Add or Change Ministers and Availabilities (PEOPLE)

If training dates are applicable, tab or click over to the **Training Date** column and enter the date.

Continue entering rows until this minister is signed up to all of the desired Ministries.

If any of the look-up lists are blank, or are incorrect, check the Look-up List Maintenance in Setup and correct if necessary.

Also specify the type of secondary rotation desired: select either **by Preference** or **by Rotate-1** or **by-Rotate-2** at the top of this Ministries section.

**By Preference** means that each assignment for this minister will be based on the numbers you set in the Preference column. You can enter from 1 to 9 for each ministry (every row starts at 5) – a 1 is most preferred and a 9 is least preferred.

**By Rotate-1** means you want this minister to be rotated through all of the ministries signed up for, on a balanced basis. This is the new, improved balanced-rotation option, and we generally recommend using it instead of the by-Rotate-2 option. It will also work to rotate through all of the position codes of the relevant services for these ministries.

**By Rotate-2** also means you want this minister to be rotated through all of the ministries signed up for on a balanced basis, but it does so by waiting until the next-in-order ministry has an opening available. This can result in more blanks in your schedule, if you don't have lots of extra people for all of the ministries involved. It also has a difficult time accomplishing the rotation if this minister is also in a Keep-Together group. We generally recommend that you avoid this option (and use by-Rotate-1 instead) unless you have tested it and know it works with the number of ministers you have available.

Both by-Rotate options are only relevant if this minister is signed up for multiple ministries; for a single sign-up you should always use the by-Preference option (for better speed when running *Create*).

- g. **Services.** This area requires at least one entry. This section is used to set up the service times the person is available to serve.

Using the mouse click on the first line of the **Service Title** column. Enter the first few letters of the type of service. Or use the F4 key to show the list and select the appropriate designation.

**Day of Week and Time.** These items are automatically filled in.

**MaxPerMth/Qtr.** If this minister has multiple services you can use this to control their relative frequency of assignment. See Max's in Section F above.

**Note:** There is another function in *Setup* for assigning ministers to a service (see Chapter 2,

### 3 Add or Change Ministers and Availabilities (PEOPLE)

Service Days and Times) – you can use either or both methods interchangeably.

If the individual is to be signed up for more services, continue adding rows – or use the *ALL* button to sign up for all times in *Setup*.

Also specify the type of secondary rotation desired: select either **by Need** or **by Rotate** at the top of this Services section.

**By Need** means that each assignment for this minister will be based on where the system most needs people to best fill-in the schedule – that is, the system will tend to put people into the least popular service-times they are signed up for. You can easily set the MaxPerMth / Qtr for any service time that you want the minister to get less of.

**By Rotate** means you want this minister to be rotated through all of the service-times signed up for on a balanced basis, but it does so by waiting until the next-in-order service has an opening available. This can result in more blanks in your schedule, if you don't have lots of extra people for all of the services involved. The system also has a difficult time accomplishing this even rotation if this minister is also in a Keep-Together group. We generally recommend that you avoid this option along with a Keep-Together group -- unless you have tested it and know it works with the number of ministers you have available.

The by-Rotate option is only relevant if this minister is signed up for multiple times; for a single sign-up you should always use the by-Need option (for better speed when running *Create*).

If any of the look-up lists are blank, or are incorrect, check the Look-up List Maintenance for the items in Setup and correct if necessary.

#### Delete a minister

1. From the Main Menu click on the **People** Screen to go to the List of Ministers.
2. From the List of Ministers, go to the **Search** field and locate the minister.
3. Click on the **Delete** button by the minister's name.

#### Inactivate a minister

1. From the Main Menu click on the **People** Screen to go to the List of Ministers.
2. Go to the **Details** screen.
3. Go to the **Search** field and locate the minister.

### **3 Add or Change Ministers and Availabilities (PEOPLE)**

At the Ministries section change the **status** from A to I. If the minister is signed up for more than one ministry, you will need to set all to I to completely inactivate that minister.

(Another way to inactivate a minister is to turn any of the maximum number of assignments amounts to zero.)

#### **The Keep Together / Keep Apart function**

This function allows families or groups to serve together, or separately. Before a group can be set up the ministers belonging to the group must be set up through the Add function described above.

ZMS supports two types of Keep-Together groups, plus Keep-Apart groupings. An “Enforced” Keep-Together group will only schedule the members if ALL of them can be scheduled at the same service. A “Partial” Keep-Together group, on the other hand, will schedule all it can together, even if one or more cannot be scheduled at that service.

When you set up a Keep-Together group, you must specify if it is to rotate “All-Due” or “Any-Available” – this has to do with how frequently you want the group to get scheduled. Whenever there is a mix of ministries involved, the group could potentially rotate with the faster-rotating ministry types, or with the slower. The “All-Due” option will wait until all members have come due (based on Last-Date-Served) and only then will assign the group. The “Any-Available” option will not wait, but rather will try to schedule the group whenever a member comes due. We generally recommend that you use the “All-Due” option, unless a group needs to get scheduled more frequently. Larger groups (four or more members) will especially take over a schedule if you leave them on “Any-Available”.

#### **Set up a Keep Together / Keep Apart group**

Go the List of Minister Groups screen by: from the Main Menu select *People*; when the screen changes to List of Ministers click on a Keep-Together button of the desired type. There are three buttons so that you can put the same minister on as many as three different Keep-Together groups; this is useful in certain special situations.

The KT screens are list-within-a-list screens: you only see one group at a time, and for that current group you see all of the members listed. To go back and forth between the different groups on that “list”, you can use the buttons at the far lower left. To make a completely new group, use the button down there that has an asterisk on it – that should take you to a new, blank group screen. You must enter a unique ID (Title) for the new group (usually just the family name), and then use the ADD MEMBER box half way down the right side to add each member desired.

### 3 Add or Change Ministers and Availabilities (PEOPLE)



#### Delete a Keep Together / Keep Apart group

1. From the Main Menu click on the **People** Screen to go to the List of Ministers.
2. From the List of Ministers, click on the **Keep Together** button that contains the group to be deleted.
3. Go to the **Search** field and locate the Group. Make sure you are looking at the group to be deleted.
4. Click on the **Delete** button below the Group ID. This will delete the grouping – but not any of the individual members.

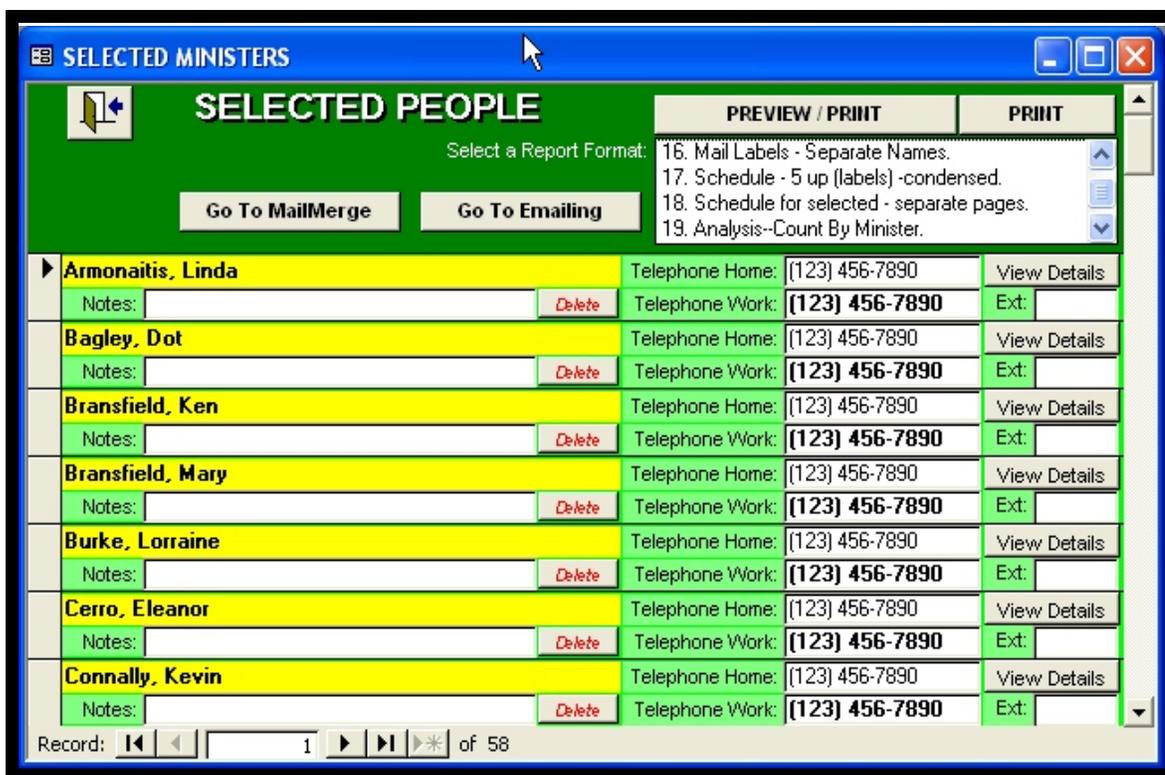


### 3 Add or Change Ministers and Availabilities (PEOPLE)

5. To include all ministers click on the Include All People button.
6. To include all categories click on the All Categories button.
7. To print only Ministers that are on the schedule click on the box next to the Scheduled People Only? line.

When this box is checked a Dates to Include box will appear. Select the date from the list that you wish to include on the report, or enter a range of dates.

8. If you want to include just Ministers available for a certain Service, use the Service Days box. To select or deselect a service click on the word Include on the line of the service(s) you want to print. To clear the selection click on the Clear button, and re-select the Services.
9. If you want to include all Ministries on the report click on the All button in the Ministries to Include box. To print only active Ministers click on the Active button. To clear the selection click on the Clear button and re-select the Services.
10. You can further define the Ministries to include on the report by clicking on the boxes labeled Active, Inactive, Trainee, and / or Other next to the description of the Ministry.
11. Click on the Next button.



### **3 Add or Change Ministers and Availabilities (PEOPLE)**

12. Select the type of report from the Preview / Print list at the top of the Selected People screen.

#### **Mailing Labels**

To print mailing labels select item 1 from the report menu. Ministry Scheduler prints mailing labels using Avery labels #5160, or #5162, 3 across, 30 to a page.

13. To view the report to screen click on the Preview / Print button. Press the Esc key to return to the Selected People from the report viewer.
14. To print the report click on the Print button. If you cancel printing the system will close the program, and you will need to start it up again.

## 4 Create / Change your Ministry Schedule (CHANGE)

### How to Create A Schedule for a Range of Dates

1. From the **Main Menu** select **Create**, then proceed as follows:

**CREATE SERIES**

### Create Schedule by Range-of-Dates

**Range of Dates** Saturday

10/1/2005 12/30/2005

Qtr Mo Day Friday Day Mo Qtr

**Run the Create Process**

**Set Up Services & Ministries?** If you want to set up each service and its Ministry Set. (blank schedule)

**Assign Names?** If you want the Names column filled in based on Last Date Served

**Enforce KT-KA Groups?** If you want the name assignments to enforce the groupings.

**Count Special Services vs. Maximums?** **Location:** Church

This process works through the specified dates, and for each service it goes person by person, starting with the one with the oldest Date-Last-Served. It tries to assign each person to a position by their preference or by by where you need them most (By-Need) -- as you have specified in each Minister's Availability screen. It may not be able to assign a person due to an NA date, a Which-Week off, a Maximum reached, or due to the KTKA groupings. Push your F1 key for more details about the four check-boxes above.

The functions on the left below will completely DELETE all of your services and names from your schedule for the Range-of-Dates specified above. This allows you to re-create them, if needed. Note that any manual changes you have made since the schedule was originally created will not be reflected, and that the new schedule will reflect the current Minister Availabilities details.

Delete ALL Services in this Date Range	Delete the NAMES assigned to ALL of these Services.
Delete the Active (X'd) Services only.	Delete Names assigned to Active Services in this Date Range.

1. Range of Dates: Enter the beginning date and the ending date range.

For example, to generate a schedule for the month of June, for a set of weekly services at 9AM, 12 PM and 5 PM every Sunday. The range of dates entered would be 6/1/xx and 6/30/xx. The program will calculate the Sundays in June, and set them up three services every Sunday, one at 9 AM, one at 12 PM, and one at 5 PM. See Setup for a more detailed explanation of how to set up each service day and time.

- a. Set Up Ministry Positions? Check this box to generate the services and ministry sets as specified in Setup.
- b. Assign Names Check this box only if there are no ministers who have requested specific dates / times. (To allow for requested services see the Entering Requested Times box.)
- c. Adjust for KT / KA Groups? Check this box if you have families or groups who wish to

## 4 Create / Change your Ministry Schedule (CHANGE)

serve together, or apart.

**Note:** You can do the first two as many times as needed, since they only fill in the unassigned blanks and work around any existing schedule.

- e. Click on the Run the Create Process button to begin the schedule-creation process.

### 2. Deleting services

The buttons labeled "Delete ALL Services In This Date Range." and "Delete only the NAMES assigned to all of these Services." are used to delete a wide range of services for a range of dates (as specified in the Range of Dates fields).

- a. The "Delete ALL Services In This Date Range." removes the services for a specific range of dates. This function may also be used as a housekeeping function to remove the previous year's entries and other entries no longer needed.
- b. "Delete only the NAMES assigned to all of these Services." Use this button to make corrections by removing all names from previously completed services for a specific range of dates. You may then re-assign the names. You will also have to re-enter any special request items, or manual entries when this function is used.

## 4 Create / Change your Ministry Schedule (CHANGE)

### Making Changes to Your Schedules

**ADD / CHANGE MINISTERS**

**EXISTING SCHEDULE** Sunday, January 01, 2006  
8:00 AM View More Details

Names Lookup:  ALL?  All for Service?  Exclude NA and MAX'd?  Epiphany

Date	Day	Time	Ministry Type	Position	Name
12/18/2005	Sunday	12:00 PM			
4th Sunday of Advent CH					
12/24/2005	Saturday	5:00 PM			
Vigil - 4th Sunday of Advent CH					
12/25/2005	Sunday	8:00 AM			
SERVICE CH					
12/25/2005	Sunday	10:00 AM			
SERVICE CH					
12/25/2005	Sunday	12:00 PM			
SERVICE CH					
12/31/2005	Saturday	5:00 PM			
SERVICE CH					
1/1/2006	Sunday	8:00 AM	Host	H1	Mabie, Joette
Epiphany CH					
1/1/2006	Sunday	10:00 AM	Lector	L1	Fattrosso, Nancy
Epiphany CH					
1/1/2006	Sunday	12:00 PM	Lector	L2	Burke, Lorraine
Epiphany CH					
			Precious Blood	P1	Gude, Luis
			Precious Blood	P2	Gude, Maureen
			*		

Record: 902 of 5

**Change** is the section of Ministry Scheduler where you can view (or change) the created schedule: every date and time ever created by ZMS can be found here, unless you have deleted it. The system is designed to keep history as far back as you want to do so. Any changes you make here will be on the schedule the next time you use the PRINT function; what you see here IS the actual schedule.

The easiest way to use this screen is to first locate the desired date and time on the list on the left half of the screen – there is a slider you can use, or you can use TAB and SHIFT-TAB to move up and down the list. Once you have clicked on the desired date /time, the right side will show you that service's ministry set and the ministers' names who are currently assigned.

You can change any aspect of the schedule here. You can delete an entire service. You can delete or change any Ministry Type on the right. And you can change who is assigned to each position.

While you can type anything you wish into any of the Name boxes, it is best if you select the Names from the pop-up Name Lookup List – that way the system knows who it is and will report their history accurately on the history reports and the analysis reports.

## 4 Create / Change your Ministry Schedule (CHANGE)

### Using the Names-Lookup List

You use the three check-boxes at the top of the **Changes** screen to indicate what you want to see on the Names Lookup. The first check-box will show ALL of your Minister's names. The second will show only those signed up for this Service. The third will show you only those who are signed up and available (i.e. have not reached a maximum, have a not-available date, or inactive due to the Which-Weeks settings).

### More Details About a single service

From the Change screen you can use the Show More Details button to go into screens that show more detail for each Service in the schedule history – such as the Title, Location, and Comments boxes. You can get to screens that will show you each Minister's counts vs. maximums and other availability information, if desired. You can also use some features on those screens to track no-shows and substitutions in detail.

The screenshot shows a software window titled "SCHEDULE SERVICES" with a sub-header "ADD/CHANGE SCHEDULED SERVICES". The window contains a table with the following columns: "Select Service:", "Time / Date", "Title", "Next-Date:", "Location", "Setup / Notes", and "Completed?:". The table lists several services, including "Vigil - 4th Sunday of Adv" and "Epiphany". Each row includes a "Delete" button and a "Ministers" button. The status "Completed?:" is shown as a checkbox for each service.

Select Service:	Time / Date	Title	Next-Date:	Location	Setup / Notes	Completed?:
1. SAT 5	5:00 PM 12/24/2005	Vigil - 4th Sunday of Adv		CH		<input type="checkbox"/> Ministers
2. SUN 8	8:00 AM 12/25/2005	SERVICE		CH		<input type="checkbox"/> Ministers
3. SUN 10	10:00 AM 12/25/2005	SERVICE		CH		<input type="checkbox"/> Ministers
4. SUN 12	12:00 PM 12/25/2005	SERVICE		CH		<input type="checkbox"/> Ministers
1. SAT 5	5:00 PM 12/31/2005	SERVICE		CH		<input type="checkbox"/> Ministers
2. SUN 8	8:00 AM 1/1/2006	Epiphany		CH		<input type="checkbox"/> Ministers
3. SUN 10	10:00 AM 1/1/2006	Epiphany		CH		<input type="checkbox"/> Ministers
4. SUN 12	12:00 PM 1/1/2006	Epiphany		CH		<input type="checkbox"/> Ministers

Record: 904 of 904

## 4 Create / Change your Ministry Schedule (CHANGE)

Completed?:  1/1/2006 Sunday 12:00 PM Epiphany CH

Select Ministries Set:  **View Available Ministers** **Clear Names**

Ministry Type	Position	Name	No-Show?	Substitute Name
Host	H1	Ferrara, Helen	F 3	
Host	H2	Holt, Ann Marie	F 3	
Lector	L1	LePage, Arlene	F 3	
Lector	L2	Hubbard, Patricia	F 3	
Precious Blood	P1	Fidler, Eileen	F 3	
Precious Blood	P2	Stringas, Barbara	F 3	
*				

On the ADD/CHANGE SCHEDULED SERVICES screen, locate the date and time you want to focus on, and click on the Ministers button. Answer Yes if you want the system to look up from history the counts-to-date and availability information (relative to this particular date). That will take you into the ASSIGN MINISTERS screen. On this screen you can also make changes to your schedule details (as on the first Change screen), plus you can track no-shows and substitutions. Plus, you can use the View Available Ministers button to see precisely each signed-up Minister's availability status (assuming you chose YES to look up in history on the way into this screen).

ministers list - available : Form

Select Sort:  Name  Date  Sex  Age  Category

Search:  Sunday 1/1/2006 12:00 PM

Name	Notes	Mn-D/T Max	Date Last Served	Week	Month	Ctr	M-D/T	Q-D/T	KTKA Groups
Armonaitis, Linda		<input type="checkbox"/> Max'd <input type="checkbox"/> NA <input checked="" type="checkbox"/> VVV	12/24/2005	Max: 1	99	999	1	99	
Counts: 0 0 0 0 0									
History: Gend: F Age: 3 Category: ENGLISH									
Bransfield, Ken		<input type="checkbox"/> Max'd <input type="checkbox"/> NA <input checked="" type="checkbox"/> VVV	1/1/1989	Max: 1	99	999	99	99	Bransfield KTED
Counts: 0 0 0 0 0									
History: Gend: F Age: 3 Category:									
Connally, Kevin		<input type="checkbox"/> Max'd <input type="checkbox"/> NA <input checked="" type="checkbox"/> VVV	12/18/2005	Max: 1	99	999	99	99	
Counts: 0 0 0 0 0									
History: Gend: M Age: 3 Category:									
Convey, Pauline		<input type="checkbox"/> Max'd <input type="checkbox"/> NA <input checked="" type="checkbox"/> VVV	12/25/2005	Max: 1	99	999	99	99	
Counts: 0 0 0 0 0									
History: Gend: F Age: 3 Category:									
Corbo, Mike		<input checked="" type="checkbox"/> Max'd <input type="checkbox"/> NA <input checked="" type="checkbox"/> VVV	12/25/2005	Max: 1	99	999	99	99	
Counts: 0 0 0 0 0									
History: Gend: M Age: 3 Category:									
Cronin, Jerry		<input type="checkbox"/> Max'd <input type="checkbox"/> NA <input checked="" type="checkbox"/> VVV	12/25/2005	Max: 1	99	999	99	99	
Counts: 0 0 0 0 0									
History: Gend: F Age: 3 Category:									

Record: 3 of 54

## 5 View or Report the Services Schedule (PRINT)

### Reporting

Ministry Scheduler prints a number of reports from both the Services and People screens. This section covers the reports printed from the Services function. The initial step in printing reports is to specify who and what to include in the report. Reports may be viewed on-screen before printing.

### Select ministries and services to include in reports

#### Description

#### What it does

Report Subtitle

Allows you to describe the report in your own words.

Uncompleted Events Only?

When this box is checked only reports which are not fully staffed will be printed (if you are using the Completed? Flags).

Dates to Include

Enter the date range you can include on the report. For example, to include only services and ministers assigned to services during the month of June enter 6/1/xx and 6/30/xx.

#### Mailing Labels and Other Reports

Reports relating directly to minister's information, and mailing labels may be printed from the People function. See Chapter 3.

The screenshot shows a software window titled "SELECT EVENTS" with a sub-header "Select Services to Include". The window contains several sections for configuring a report:

- Report Subtitle:** January 2005
- Dates to Include:** A section with date pickers for start (1/1/100) and end (12/31/2099) dates, and radio button options: ALL DATES (selected), TODAY ONLY, THIS WEEK, NEXT WEEK, THIS MONTH, NEXT MONTH, THIS YEAR, and TODAY AND FUTURE.
- Service Days / Times to Include:** A table with columns for service number, day, time, and an "Include" checkbox.
 

ALL	Service Days / Times to Include:			CLEAR
1.	SAT 5	Saturday	5:00 PM	<input checked="" type="checkbox"/> Include
2.	SUN 8	Sunday	8:00 AM	<input checked="" type="checkbox"/> Include
3.	SUN 10	Sunday	10:00 AM	<input checked="" type="checkbox"/> Include
4.	SUN 12	Sunday	12:00 PM	<input checked="" type="checkbox"/> Include
	XMAS VIGIL	Tuesday	5:30 PM	<input checked="" type="checkbox"/> Include
- Ministries to Include:** A table with columns for Description, a "Check" checkbox, and "Each to Include".
 

ALL	Ministries to Include:		CLEAR
Description	Check	Each to Include	
Altar Server	<input checked="" type="checkbox"/>	Include	
Bristol Manor	<input checked="" type="checkbox"/>	Include	
Greeter	<input checked="" type="checkbox"/>	Include	
Host	<input checked="" type="checkbox"/>	Include	
Lector	<input checked="" type="checkbox"/>	Include	
Precious Blood	<input checked="" type="checkbox"/>	Include	
Usher	<input checked="" type="checkbox"/>	Include	
- For Just 1 Room:** A dropdown menu with "ALL ROOMS" selected.
- Uncompleted Events Only?:** An unchecked checkbox.
- Report Footer:** A field containing a long string of "x" characters followed by a "Z".

## 5 View or Report the Services Schedule (PRINT)

### Description

### What it does

**Date Short Cuts.** These selections under the Dates to Include fields will automatically change the dates to the period specified. The options are: All Dates (can produce a really long report!), Today Only, This Week, Next Week, This Month, Next Month, This Year, Today and Future. (Ignore if you are typing in the dates.)

For Just 1 Room

If multiple locations are used for services this will print out the schedule for the specified location.

All Rooms

If multiple locations are used for services this will print out the schedule for all locations. **Be sure to click this button if you are not using Locations.**

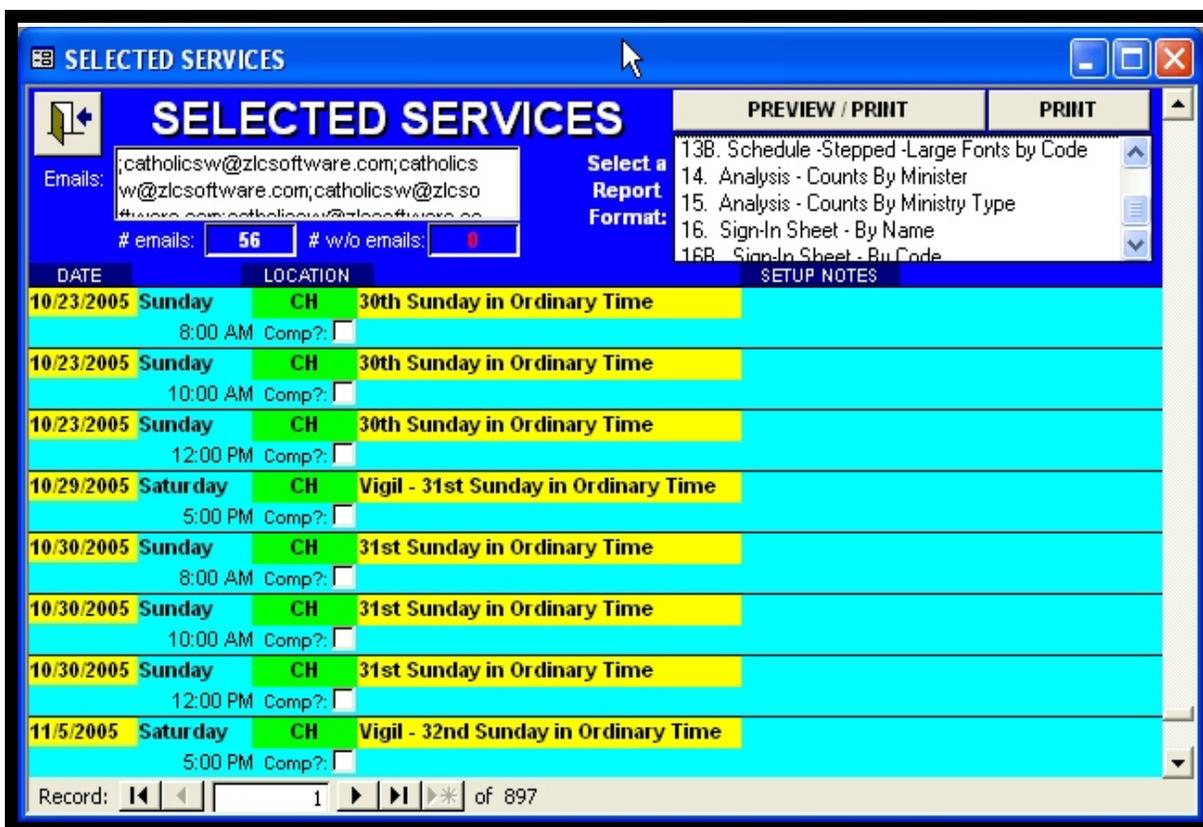
Report Footer

Allows you to put a footer on every report page.

## 5 View or Report the Services Schedule (PRINT)

- Service Days / Times** Check the box next to the service(s) to include on the report.  
Click on All to automatically select all services.  
Click on Clear to deselect all services previously selected.
- Ministries to Include** Check the box next to the ministry type(s) to include on the report.  
Click on All to automatically select all ministry types.  
Click on Clear to deselect all ministry types previously selected.
- Printer icon** This is not for printing any schedules. If desired, you can print this selection screen by clicking on this printer icon. Use the Esc key to return to the Select Services To Include screen.
- Next** Once you have specified your selections, click on Next. See below for the detailed continuation of this function.

### The *Next* Function



After selecting the *Next* function a new screen appears which shows the services selected, and includes the following functions (**make sure this list is not blank!**):

## 5 View or Report the Services Schedule (PRINT)

<u>Screen function</u>	<u>What it's for</u>
Reports	<p>A list of reports is shown below the Preview / Print button. Select the report you want to print.</p> <p><b>Note:</b> Mailing labels are printed from the <i>People</i> function. See Chapter 3.</p>
Preview / Print	<p>Shows the report on the screen. Click anywhere on the report to zoom in or out.</p> <p>To print the report from Preview use the File pull-down menu in the upper left hand corner of the screen, select Print and proceed. Or use the shortcut: Ctrl plus P.</p> <p>To adjust paper size, number of copies, and so on select from the top menu bar File, Page Setup.</p> <p>To exit use Esc, or from the top menu bar select File, then select Close.</p>
Print	<p>Prints the report to paper.</p>
Email Addresses	<p>This box has the emails of every minister on the selected services. You can cut and paste these into any email software message (the CC box or Blind CC box) to send that message to all those ministers. You can also send any previewed schedule report to WORD and then attach that WORD file to the same message. See the <i>People</i> section (Chapter 3) for more ways to use email and how to create a roster attachment for this message.</p>

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Even if you prefer using the mouse, there are certain keystrokes you should know for the most effective use of your ZLC Ministry Scheduler. For example, you may find it far easier, when you arrive at a pull-down lookup box, to just press F4 than to click on the tiny pull-down arrow. Also, if you are working on the same data column in a list-view, you should know that CTRL-DOWN/UP moves to the next/prior employee without moving the cursor away from that data field.

### Two major window-types

There are two different ways your data may be displayed, depending on the current context.

1. **List-windows** show multiple records at once, and you can use a vertical scroll-bar on the right side to move through them. Each record usually has a small "record-selector" button at its left end (used for selecting sets of multiple records and for dealing with whole records: for cutting and pasting operations, for example).
2. **Record-windows** show a single record at a time -- as if each is a page in a book and you can only see one page at a time. There is no vertical scroll-bar, and usually no "record-selector" at the left.

The same information records can be shown in either type of window. And any particular window may not show all of the record's data, i.e., a summary list may just have dates and titles, whereas a full-screen view may show all of the detail.

While the appearance is very different, you will be dealing with these views in similar ways. When you change any data, it does not matter which view you are in: if you change the starting time in a list window, that same event will have the new starting time henceforth in every other view and report.

When moving among multiple records, there is a "Ditto" function available: in any cell you can enter Ctrl-" or Ctrl-' to duplicate the contents of the same cell in the previous record.

Both types of windows use the "record-navigation" buttons at the lower left of the window to step through the records, or to go directly to the first or last record of the set. Both also allow you to move through the records using Ctrl-PageUp / Ctrl-PageDown keys.

## Moving around on a screen or a list

Note that the Scheduler screens contain Labels and Data, and that not all data can be changed. If the field background is white, that usually indicates data that can be changed. The Read-only data is presented for information, but usually must be changed on another, more basic screen (where it can be updated to all the various levels appropriately).

1. To move between the active data fields on a screen/form use:

DOWN or TAB or ENTER to move forward to the next field;

UP arrow or SHIFT-TAB to move back one field.

TAB and SHIFT-TAB are the recommended way to move from field to field.

Note that if you use the mouse and click on a field you usually end up in the middle of a field in Edit-Mode. For replacing the field contents, it is more efficient to click on the prior field then switch to the keyboard and TAB into the desired field. Then you can either type new information in immediately, or use F2 for Edit Mode.

2. To move to the next/prior employee (or next/prior History record) use PGUP/PGDN or CTRL-PGUP/DN. Or, you can use the "*record-navigation*" buttons at the lower-left of every window: these will take you to the first, previous, next, and last record respectively. Also, you can push F5 then type in a record number to go directly to that record.
3. You can also locate a particular record by using the *Find* function. You should first enter the field you want to search on, then push CTRL-F (or use the Edit-Find menu) and fill in the pop-up window as appropriate. (Use ESC key to remove the window. Use CTRL-F then ALT-F to do a Find-Next -- or use F3.)

## Editing within a field

1. When you first enter a field, the contents are highlighted. At that point you can use Edit - Cut / Copy Paste, or if you type new data the old disappears (to make it reappear, push Esc before exiting that field). Shift-Insert / Shift-Delete are the same as cut and paste.
2. To edit that pre-existing data (instead of over-writing it) push F2 to enter Edit-Mode. (Use F2 again to EXIT Edit-Mode and stay in the same field).

### 3. In Edit-Mode:

LEFT arrow moves left one character;  
RIGHT arrow moves right one character;  
Ctrl-LEFT arrow moves left one word;  
Ctrl-RIGHT arrow moves right one word;  
HOME moves you to the far left end;  
END moves you to the far right end;  
ENTER leaves the field and moves you on to the next field.  
ESCAPE returns the contents to the starting point (you lose all the changes you have made).

Special considerations for editing inside a MEMO (multi-line) Box:

Ctrl-ENTER starts a new line (ENTER exits the field!);  
Ctrl-HOME arrow moves to the upper left corner;  
Ctrl-END arrow moves to the lower right corner;  
ESCAPE returns the contents to the starting point (you lose all the changes you have made).

### **Entering / editing dates**

You enter dates by typing MMDDYYYY or m/d/yyyy - the rest is entered for you automatically.

### **Pull-down lookup lists**

Whenever you get to a field with a pull-down arrow at the right end, it may be easier to open the lookup list by using either your F4 or ALT-DOWN keys than to reach for the mouse. And whether the list is open (showing) or closed, when you start typing **each letter** ZMS will search for and present the first matching item from the list. As soon as you have the desired match, use TAB or Enter to move to the next field (or Ctrl-PageUp/Down to move to the next record - same field). Some situations allow you to enter information that is not on the Lookup List, others enforce a match. If you must make an entry that is not on an enforced list, you must contact the system administrator to alter the Lookup Table.

### **Adding and deleting records**

In ZMS the ADD is automatic. If you make any entries at all, when you leave the record it is automatically saved. If you use the Save button on such a new record but then decide you do not want it (while you are still in that record), you can use the Delete button to remove it. You will get a message that it has been deleted, and end up with a new empty screen.

To delete a previously added event you locate that event in the LOCATE / CHANGE function and then use its Delete button. All of its attendant records detail will automatically be deleted as well.

We include with ZMS two different data files: MS97DAT7.MDB and MS97X7.MDB. The former is empty of services and individuals, and the latter has many entries illustrating all the ways the Scheduler handles various types of events.

We recommend you spend time with the sample data viewing all of the various services. It will be much clearer how to set up your own data after you are more familiar with the various features that are available.

### **Switching between the sample data file and your own data**

The Scheduler program can only be connected to one of these data files at a time. When you are ready to set up and use the system with your own events, you will need to attach the Scheduler program to the MS97DAT7 file. Then if you later wish to view the examples again, you will attach to the MS97X7 file.

You accomplish the switch in SETUP. To attach to MS97DAT7 use the CHANGE DATA PATH button, and fill in the screen as follows:

File Name:MS97DAT7  
File Path:C:\ZMS

then click on REATTACH and wait for the system message that it has completed the process.

Then to switch back to the example data, you just substitute MS97X7 as the file name above. You can switch between those two data files as many times and whenever as you wish.

If you attempt to leave a record or a screen that contains invalid "key" data - the information used to link various parts of the system - then you might receive one of the following two error messages.

### **Index or primary key can't contain a null value.**

This message indicates that an important piece of information has been left blank.

### **Duplicate value in index, primary key, or relationship. Changes were unsuccessful.**

This message indicates that a field - or combination of fields - already exists and that the new record is attempting to create a duplicate that is not allowed.

In either case, if it is not apparent how to correct the problem, you can always use the ESC (Escape key) to undo the changes you have just made. This puts the system back into an acceptable state. ZMS simply always insists on "good" data before saving any record - and this assures you that you will always have an accurate and properly structured set of information.

This addition to the Ministry Scheduler User's Guide covers just the new features found in the Deluxe Edition of version 502.

## 1. New reports:

### a. People Reports:

#### **Report 12. Roster - 1 Line- Condensed**

This is a new one-line-per-minister roster that squeezes more lines onto each page; otherwise it is the same as the earlier 2. Roster-1 Line report.

#### **Report 13. Roster - 1 Line- Notes2**

This report is like 12, except that it prints the new Notes2 field for each Minister. If you use the special function for filling in the Notes 2 with that Minister's availabilities, then this is the report to go along with that function.

#### **Report 14. Roster - 1 Line- 3 Across**

This is an even more condensed report, since it prints three Ministers on each line.

#### **Report 15. Schedule - 3 Up (labels)**

This is a special report that prints Ministers' individual schedules onto small labels. This allows you to send handy copies of the individual's schedule along with the overall schedule you send out. The Minister can then affix that small schedule to a calendar, or other handy place. The format is for a sheet of twelve labels (3 across x 4 vertically), and each label can hold up to five assignments. You must make sure you do not print a range-of-dates that results in more than five assignments, because the report does not wrap onto the next label. If you just print out each month separately onto the labels, and you will always come out ok. Also note that you must specify SCHEDULED PEOPLE ONLY to get the best results.

#### **Report 16. Mail Labels - Separate Names**

This format was added to go along with the Mailmerge functions which separate the Name fields into separate name-parts, along with adding a new Title field. Once you have utilized that function in Mailmerge, you can then use these mail labels for a more proper formatting of the names on the labels.

Note that **all** of the People reports now have a Footer field added to them.

### b. Service Schedule Reports (PRINT Function):

Report 10. Schedule - 7 Across (8.5" x 14")

Report 11. Schedule - 8 Across (8.5" x 14")

Report 12. Schedule - 9 Across (8.5" x 14")

These three new reports just expand the capacity for situations that call for that many services to print on each row. The very first time you use each, you should select PREVIEW then from the Preview screen go into Print Setup and change the Page Size to Legal. Then do File-Save to save the change and the system should remember the page size henceforth.

## 2. Unlimited Not-Available Dates per Minister:

In PEOPLE-DETAILS on the Minister Availability screen at the lower right you can now enter as many Not-Available Date ranges as you need to. There is always a blank row at the bottom of the existing list. You can either use the plus and minus buttons to set the dates week by week, or you can simply enter any date-ranges desired. You can delete any row by clicking on the left end of the row(s) to be deleted then pushing Delete on the keyboard

When you run the CREATE process for a range of dates, it goes through the services in date / time order. For each, it attempts to assign each minister that has come due (rotationally). Among other things, it checks that minister's N-A Dates against the date of the service being filled, and skips on to the next minister whenever it runs into an overlapping N-A Date Range.

There is a special utility in SETUP for purging old N-A Date Ranges that only relate to dates scheduled in the past, and are thus no longer needed. Rather than deleting from each Minister's Details screen, this utility asks for a cutoff date, then deletes for all Ministers any N-A Date Ranges older than that cutoff date.

## 3. Notes2:

A second Notes box has been added for each Minister, so you can keep private notes in Notes1 and keep more public notes in Notes2. And there is another use for Notes2: in SETUP there is a special utility that will fill Notes2 with each Minister's Ministries, or Days / Times, or both of those. Then you can use the special roster report that uses Notes2 to print a summary list of Ministers with their signups, in a very condensed format. This is useful for churches that send such rosters to all of their ministers so they can arrange for their own substitutions when needed.

To use this special function, you must first go into the MINISTRY TYPES list and enter a one or two letter code for each Ministry Type into the special Notes2 Code box you find there. Then you can click on the button at the lower left of the SETUP screen that fills in Notes2.

There are some warnings involved in using this function. First, the Notes2 field can only hold a certain number of characters. If you have very many service days / times, and any ministers are signed up for many of them, then the titles of those services must be kept short enough to fit into the Notes2 field. Secondly, if you leave any of the Code boxes for the Ministry Types blank, you will encounter error messages while running the utility.

### **4. Mail-Merge**

This new function is useful for merging selected Ministers' information with other programs (such as WORD or EXCEL) and also for printing mailing labels with the Ministers' Names in First Name, Last Name order.

You get to this function from the SELECTED PEOPLE screen (after PEOPLE-SELECT-NEXT). First, you get to the screen for maintaining separate name fields. You can use the built-in function that separates your Names, and/or directly edit the separate name boxes if needed.

From that screen you can go to the Select Fields screen, where you indicate what Minister information to merge. Then you use the Build The Source Table button. Many programs, including WORD, can utilize that table directly, so this may be all you need to do. To tell a program where to find the source table, you will tell its name: MERGE and the file it is in: MS40B.MDB, and the location of that file: C:\ZMS. If you need to build actual, separate mailmerge files, there are buttons there to do that automatically. There is a separate button for each type of mailmerge file: text, comma-separated-values, or WORD mailmerge.

### **5. Equal Rotations**

The program now offers three ways to control Multiple Ministries assignments: By-Need, By-Preference, or By-Equal-Rotation. The last is new, and it is also offered for Ministers signed up for multiple Days / Times. If you specify Equal Rotation for a Minister with Multiple Ministries, then the program will ensure that the Minister rotates through all of the Active ministries in order, before repeating any of them.

The Equal-Rotation for Days / Times will similarly ensure the Minister serves at each service in order. The system will only assign that Minister when it finds an opening in the next-due Day / Time in the rotation, rather than for the next Day / Time that may need that Minister.

In some cases this is the best way to specify the Multiple Ministries, but there is a downside because the system can more easily come up short of people for a particular service. If you find the system is leaving positions unfilled when you should have sufficient Ministers, look at the By-Rotation and at the Maximums, to see if they are blocking too many assignments.

WARNING: The Rotation option has some other risks, if you are not careful in its use. For example, if you have set up an inactive (not utilized) Ministry Type, and have Ministers signed up for it, then you must **NOT** set any of those Ministers to Equal-Rotation. If you do, the system will dutifully wait forever for the inactive Ministry Type to get its turn... For the Days / Times, there is an Active? / Inactive flag, so we have been able to program this Rotation function to ignore any Inactive services a Minister is signed up for. We also have it ignore all Special Services – i.e. any with a Date filled in on the SETUP-DAYS/TIMES list – otherwise, the Ministers could also get stuck waiting for Christmas, etc.

### 6. Maximums vs. Special Services

In CREATE there is now a new choice for whether you want any Special Services being assigned to count against the Ministers' various maximums. If you do not X this box, then the process does count all assignments to Special Services when it is checking to see if a Minister has reached any maximums.

For example, if you have a Minister who is set to a maximum of one service per month, and he/she is assigned to a Special Service early in a month, then that Minister will not be assigned to any other services during that month. If you do X that box, then that same Minister could be assigned later the same month, if he/she came due again.

Note that this setting does not affect the determination of the LAST-DATE-SERVED; whether the last assignment is to a Special Service, or not, it still counts as the last date served.

New Features and Functions added in Version 404 (April 2004):

## **1. MAXIMUM(S) PER QUARTER.**

We have added a new MAX-PER-QTR box for every Ministry and every Mass-Time of each Minister. This, in conjunction with the existing MAX-PER-MONTH, gives you complete control over how many times each Minister gets assigned to each of the Ministries and Mass-Times you've signed them up for.

## **2. NEW ROTATION OPTION and IMPROVED ASSIGNING LOGIC.**

In addition to the previous options we've offered, there is a new BY-ROTATE option that combines the best of the old BY-ROTATE and BY-PREFERENCE. By tracking the last Position-Code as well as the Last Date/Time and Last Ministry, we now give you better rotations between one Minister's Ministries and Mass-times, and even their Ministry Positions, as well as still keeping a good overall rotation between your Ministers.

## **3. MULTIPLE KEEP-TOGETHER GROUPS FOR EACH MINISTER.**

You can now specify for each Minister up to three separate Keep-Together / Apart Groups. This gives you the ability to keep them together non-enforced with some people, completely enforced with other people, and apart from others.

## **4. FIVE TYPES OF KEEP-TOGETHER GROUPS.**

We have added two new less-enforced types of Keep-Together Groups, in which if some members are not available the rest of the Group still get scheduled.

## **5. SIGN-IN AND SUBSTITUTION TRACKING.**

You can print a SIGN-IN sheet, and also indicate within the system the NO-SHOWS and who was substituted.

## **6. PRIMARY / SECONDARY MASSES.**

When you have both a special holyday mass and a regular weekly mass at the same day/time, you can specify that the special mass automatically take precedence on the date that it happens.

## **7. CHOICE OF SORTS ON SCHEDULE REPORTS.**

Each of the Schedule formats can now be printed either by Last Name or by the Position Code (within each Ministry)

## **8. INDIVIDUAL CREATE-LOGS.**

You can view a summary or detailed log of how any one Minister's assignments were decided: what affected or prevented availability at any particular date / time; how preferences were applied, etc. Great for when questions arise.

## **9. POP-UP HELP; POP-UP CALENDARS.**

Context-sensitive comprehensive HELP for every screen and function; calendars pop-up option for easy date-setting.

## **10. AND LOTS OF OTHER IMPROVEMENTS.**

Stop CREATE anytime; rosters sub-grouped by Ministry; enhanced data-structures; salutation field; even/odd weeks...