DAVALLIA TECHNOLOGY

SmartRoster™

Intelligent scheduling | Full automation | Total control

USER MANUAL
VERSION 4.1

Davallia Technology

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What can **SmartRoster** do for me?

Chapter Contents

SmartRoster is full of powerful features to help you create with confidence the best possible schedule for your small or large organization. **SmartRoster** handles the scheduling tasks that you once had to do manually.

Welcome to SmartRoster

Scheduling is a difficult, complex, and ever-changing task. You spend many hours assigning individuals to roles and dates, and just when you think you have it right, you spot someone who is scheduled to play keyboard and work the overhead projector on the same day. This is just one of any number of situations that might force you to go through the whole process again. And the more people, roles, and meetings you have, the more complex it gets. Fortunately, SmartRoster makes your scheduling process both easy and efficient. Rather than wading through personal information like routine absences, role requirements, household and group requirements, personal associations, and trying to create a schedule that works for everyone, you can now just let SmartRoster do the work for you.

SmartRoster Limits

Registered users

For registered users there are no limits on the number of schedules, events, roles, or people you can enter, apart from your hardware limits (such as the amount of memory in your computer), or license limit (for number of people you can store in the program).

Un-registered users

SmartRoster will cease to operate 30 days after first installation and must be registered if you wish to continue using it.

Feature	*Unregistered*	*Registered*
Maximum number of People	Unlimited[1]	Dependent on your licence conditions
Number of Households	Unlimited	Unlimited
Number of Groups	Unlimited	Unlimited
Number of Events	Unlimited	Unlimited
Number of Roles	Unlimited	Unlimited
Duration of license	30 days	Unlimited

What Can SmartRoster Do?

SmartRoster has many powerful features to help you manage your people, repeating events, and schedules. SmartRoster handles the scheduling tasks that you once had to do manually. SmartRoster:

- Stores important data on your organization, personnel, schedules, roles and events,
- Handles personnel with specific associations by allowing you to set up detailed constraints that are followed when the Automatic Scheduler fills your schedule.

[1] *Unlimited* in this page means limited by the computer's hardware memory capacity only

- Lets you set up a person's timeline to specify dates when the person is not available, and to do the same for whole households at a time, as well as groups of people;
- If you choose, you can manually fill schedules, by selecting the individuals from the People or Role panels;
- Lets you easily modify your schedule to accommodate last-minute changes;
- Allows for special one-off events (such as a midweek Missionary meeting) with their own specific personnel requirements;
- Enforces specific individual usage targets (such as once a month, or every 2nd week);
- Automatically evens out usage of people on schedules, while still satisfying individual associations (for individuals where specific targets are not set);
- Allows specification of various constraints, such as: known absences, patterns of absence (e.g., to suit fly-in fly-out workers), matching people to roles, role-role compatibility, households or friends that prefer to be, or not to be, scheduled on the same day;
- Automatically fills your schedule with a single click, matching role requirements to personnel availability and skills, and factoring in personal associations;
- Allows for multiple events (e.g. Services) per day;
- Prints master schedule (selected roles on one page) or individualized schedules (showing only the recipient's roles), for individuals, or households, with names pre-highlighted;
- Generates a booklet-style address book;
- Generates read-only and print-ready electronic version of any report, ready to be emailed to recipients, who use the supplied SmartRoster Viewer (which comes with this program, free to distribute) or Acrobat Reader;
- Automatic email reminders;
- Import/Export existing personnel data in comma/tab delimited format from your existing personnel database (eg Church Management System);
- Easy-to-use drag and drop style MS Windows™ Interface;
- Very modest hardware requirements – runs fine on any PC running Windows 98 or higher (see System Requirements, page 25).

SmartRoster Basics

Whether you're comfortable with computers, or a complete beginner, this is where you should start. This manual will tell you everything you need to know to start using SmartRoster. Before you start, make sure that you understand some of these basic terms and concepts.

- Windows Terms
- SmartRoster Terms
- SmartRoster Panels
- Exiting SmartRoster

Windows Terms

Clicking

When we refer to clicking, we mean that you place the mouse pointer over that section of the screen (by moving the mouse) and press the left mouse button once.

Double clicking

When we refer to double clicking, we mean that you place the mouse pointer over an item on the screen and quickly press the left mouse button twice.

Right clicking

When we refer to right clicking on something, we mean that you place the mouse pointer over an item on the screen and press the right mouse button once.

Drag & Drop

To Drag & Drop, move your mouse over the object, click the left mouse button and hold it down while moving the mouse elsewhere. Then, once you have positioned the mouse where you wish to put the object, release the left mouse button.

For example, to add a person, drag & drop the person from the People panel (at the left) to the Role Members area by doing the following:

1. If the People panel is not visible to the left of the main window, open it by selecting View People from the View menu on the menu bar.
2. Make sure at least one role exists and that the Role panel is visible (in the same way as you made sure the People panel was visible).
3. Select a person from the list of available people on the People panel. Keep holding down the left mouse button and move your mouse cursor to the white Role Members list area in the upper right of the screen.
4. Release the left mouse button. A person is now added to the Role Members list.

Checkboxes (or Tickboxes)

When we refer to selecting or ticking an option, we mean that you should click on the checkbox, so that a tick mark appears in the checkbox like this: When we refer to de-selecting or clearing an option or checkbox, we mean that you should click on the checkbox, so that the checkbox is cleared, and appears like this:

Option button

When we refer to clicking on this option or selecting this option, we mean that you should click on the Option button, if necessary, so that it appears like this

Drop-down list

When we refer to selecting from a drop-down list, we mean that you should click on the down arrow to the right of the box, which displays the drop-down list and then you should click on one of the choices to select that choice.

Menu bar

The Menu bar is the top section of the SmartRoster screen that lists the program function groups - File, View, Events, People, Role, Schedule, Report and Help.

See *Using SmartRoster's menus* on page 116 for further details.

In this manual, terms like "…select the **File > New** menu…." mean that we are asking you to click on the first word (in this case **File**) on the menu bar followed by the second word (in this case **New**) in the drop down menu.

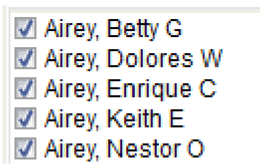
Tool bar

The Toolbar is the area just below the Menu bar. It contains several pictures, each of which activates a different area of the program when clicked. All these items correspond to menu choices that are available on the main menu bar.

See The SmartRoster Toolbar on page 119 for details.

Check List box

The Check List Box is a list box that contains a tick box on the left of each item in the list. You can click the tick box next to an item to make the item active (if ticked) or inactive (if unticked). The meaning of active/inactive will depend on the context, but is usually self-evident.



In some cases right-clicking on a Check List Box will activate further choices.

SmartRoster Terms

Automatic Scheduler

The Automatic Scheduler is the program that actually fills the schedule once you have defined all the constraints and entered the information it requires. It is accessed by clicking **Auto Fill** on the Tool bar, or selecting menu **Schedules > AutoFill.**

> Using the Automatic Scheduler does not prevent you from manually allocating parts or all of certain schedules yourself. It is likely you will need to do that at least for some roles. Keep in mind, however, the more manual allocations to the schedule you make, the less benefit you will obtain from using the Automatic Scheduler, and the more likely it is that you will introduce errors that the Automatic Scheduler is designed to prevent. The Automatic Scheduler uses proprietary technology to obtain the best possible schedule given the set of associations, usage targets, etc. It is very unlikely you will be able to manually match its output by manually allocating all positions, without taking a very long time!

Event

SmartRoster uses the word Event to mean a series of meetings (which could be a single meeting, a set of discrete dates, or a pattern – eg weekly – of meetings), where each meeting in the series requires the same roles and the same number of individuals on each role. If a specific meeting requires different roles, or a different number of people in any role, then you need to define a separate Event for that meeting. In summary, an event is a unique pattern of Times and Roles with a unique set of role requirements.

Role

A Role is an activity required by an event (e.g. keyboard player, overhead projectionist). Individuals can be assigned to one or more roles. When assigned to a role, the individual can be nominated a desired usage (such as once a week, twice a month, or 7 times a year). If not so nominated, the Automatic Scheduler will attempt to schedule role members as evenly as possible.

Person

"Person" refers to any individual who is to be scheduled. What applies to a person also usually applies to households and groups. You can apply constraints directly to households and groups, which then affect each person in the household or group.

Constraint

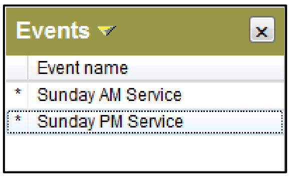
The Automatic Scheduler forms the schedule based on the constraints that you will enter, specifying necessary and desirable relationships

- between persons (or households or groups) (called Association preference)
- between roles (called Role compatibility)
- between roles and persons[, households or groups]
- between events and roles
- between events and persons[, households or groups]

Schedule

For each role a schedule will be generated (manually or automatically) which indicates **who** (person, household or group) will fill **what** role, and **when**. The schedule will be generated for each event date/time for which the corresponding role is required.

SmartRoster Panels



All panels have some aspects in common.
They all have a **title bar** like that shown at right:

The down arrow indicates a menu is available by clicking either on the arrow or the above text. Clicking on the X will close that panel. To reactivate a closed panel, you will need to select the appropriate option from the View menu, or chose the appropriate tool bar icon.

You can re-size the panels by clicking between panels. Move the mouse pointer over the region between panels. When the mouse pointer looks like hold the left mouse button down and move it to resize the panels on either side.

The SmartRoster screen has four different Panels –

- *People* (this panel shows *Individuals, Households, Groups and Comments*),
- *Events,*
- *Roles,* and
- *Schedules.*

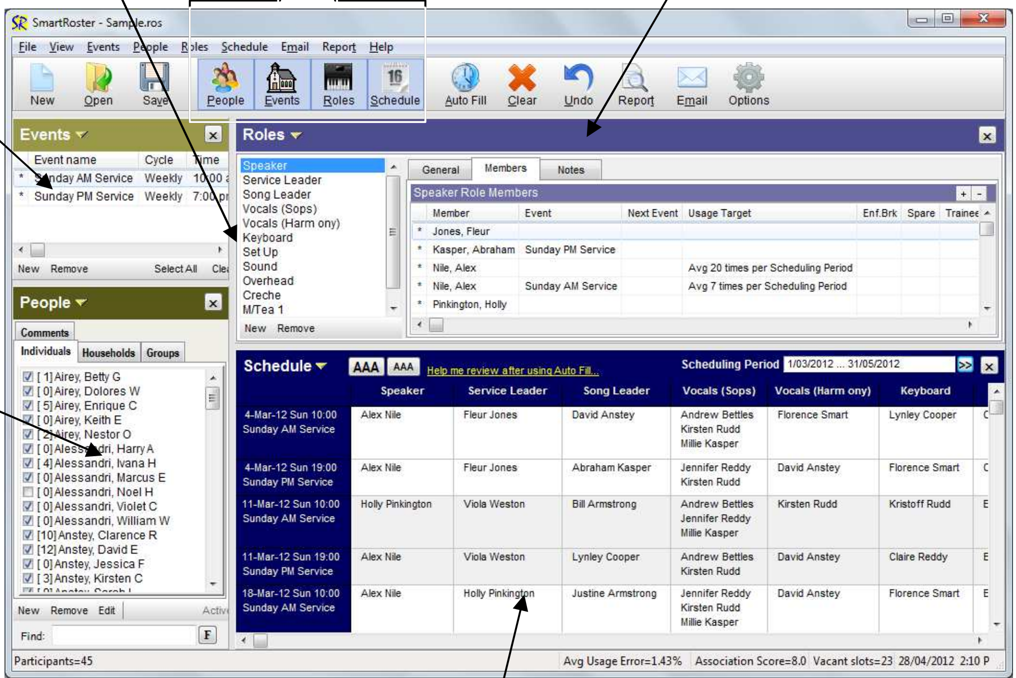
Each of the panels allows you to manage the objects you see inside that panel.

***Click** and **drag** anywhere on the borders to re-size the panels*

Use these tool bar buttons to alternately hide or show any of these panels

The **Roles** panel – *is where you define the roles. Roles correspond to specific skill sets to which individuals are allocated. You can simply drag names from the People panel into the Role Members list of those who are able and available to fulfil that role. For each role a separate column will be generated in the Schedules panel (as long as Include on Schedule is ticked). See page 40 for details*

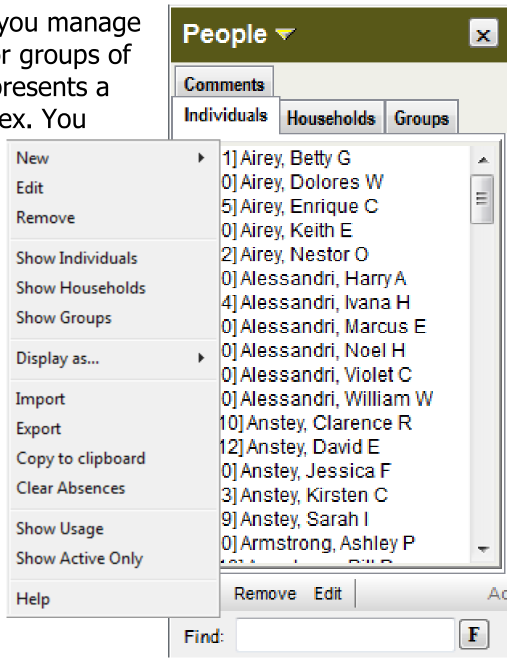
The ***Events*** Panel – *is where you define the sorts of events your Church or club needs schedules for, including the dates on which these events occur, and also the roles these events require to be scheduled. See page 42 for details*



The ***People*** panel – *is the main area for managing persons, households, and groups and always displays along the left hand edge. It will show Individuals, Households, or Groups depending on which option is selected from the **People** menu. This panel allows you to add people, households, or groups (more on that later), edit existing ones, or to remove them. See page 28 for details.*

The ***Schedules*** panel – *Here you construct the final schedule for each role specified in the Roles panel. You can do this completely manually by dragging names from the role participants list or directly from the People panel; you can get SmartRoster to do it for you completely automatically (obeying all constraints you have defined) or (and this is most likely) you can set up part of the schedules manually and get SmartRoster to finish it off for you. See chapter 5, page 46, for details*

The People Panel



The People panel is the area in which you manage your lists of people, households, and or groups of individuals or households. This panel presents a tabbed list similar to a telephone teledex. You select tabs by merely clicking on the tab you wish to display.

You can change the tabs to display three letters at a time (e.g. ABC), to display households, or to have no tabs at all. To do this either click on the drop arrow under People, or right-click on top of the actual list. You will see the following menu. Select **Display as...** to change the way the tabs display.

The People panel can display **Individuals**, **Households**, **Groups**, or **Comments**. Just select the appropriate button.

As you can see, items are listed in alphabetical order. To edit an item double-click on that item. To add a new item, select **New** from the menu. To remove an item, first select the item, then right-click and select **Remove** from the menu.

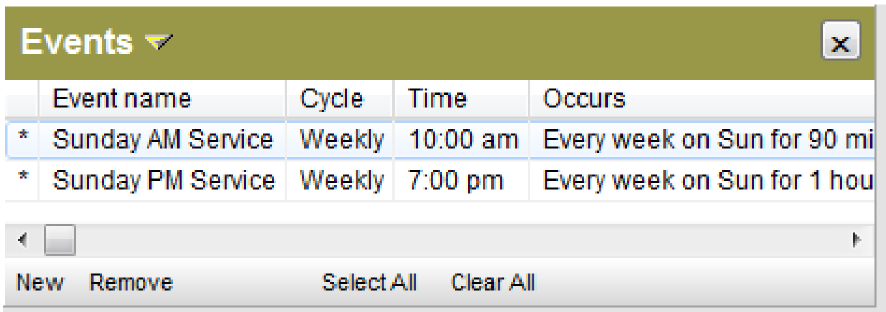
The check box to the immediate left of individual names can be used to activate or deactivate those persons, households or groups globally. When a person is inactive, that person will never be automatically assigned to any schedule, even if they belong to a role that is being scheduled. While inactive, that person (or household or group) will be ignored by the Auto Scheduler. If it is a household or group, then the Auto Scheduler will ignore every person belonging to that household or group.

The **Find**: box allows you to narrow down the list by entering the a few characters of the first or last name. The panel will display only those names that conain the search string in this box.

Advanced Filter button:  Click this button to create an advanced filter. This allows you to restrict the people visible in the People panel. The query allows you to select or nominate values or partial values for any of the attributes such as name, address, telephone, email, notes, events, roles, groups. See also page 90 on how to create and use advanced filters.

See chapter 3 for details on managing people.

The Events Panel



What is an Event?
See page 12

This panel lists all currently defined events. Events are a short cut for a pattern of date-times and a list of valid roles. The Event name will appear on printed schedules, as well as in the Schedules panel (below). Once again, you can activate or deactivate an event by ticking the check box. An inactive event will NOT appear in the Schedules panel, and the Automatic Scheduler will not attempt to schedule any role to that event.

To edit an event definition, double-click on the event name. To add a new event, click on "Events" and select **New** from the menu. To delete an event, select **Remove** from the menu. You can select multiple events to remove by holding down the shift or control keys while selecting events.

See chapter 4 for details on setting up Events

.

The Roles Panel

What is a Role?
See page 12

This panel is where you will set up each role for which you wish to create a schedule. It is organised as a tabbed display, one tab for each role. Within each role tab, you can further select information about the role by clicking one of the subordinate tabs "General", "Members", or "Notes". To assign people to a role (these are called Role Members), you can drag & drop each person individually from the *People p*anel (the *People* panel must be visible) or use the context menu (right-click over the Members list) an select New. Only those Role members will show who are available for the events that are active (ticked) in the Events panel unless "Show all members" is selected from the context menu.

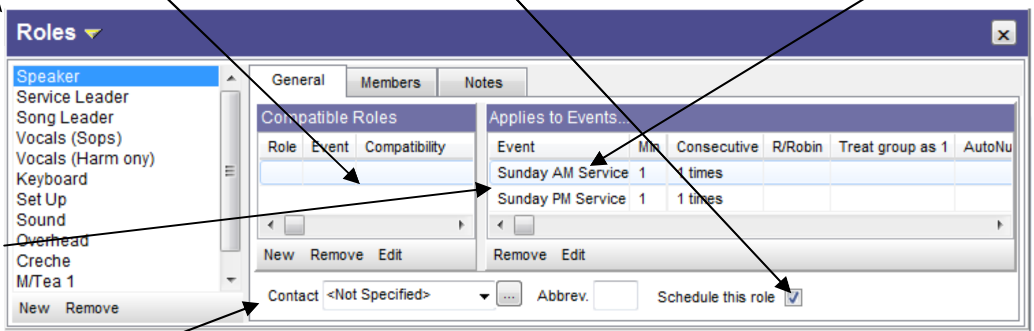
See chapter 4 for details on setting up Roles.

The Roles menu can be accessed by clicking here

By default, if a person is scheduled during an event (service) to a given role, they cannot be scheduled onto another role (they are incompatible). By adding roles into the Compatible Roles list, you can allow for people to be scheduled to multiple roles for the same event.

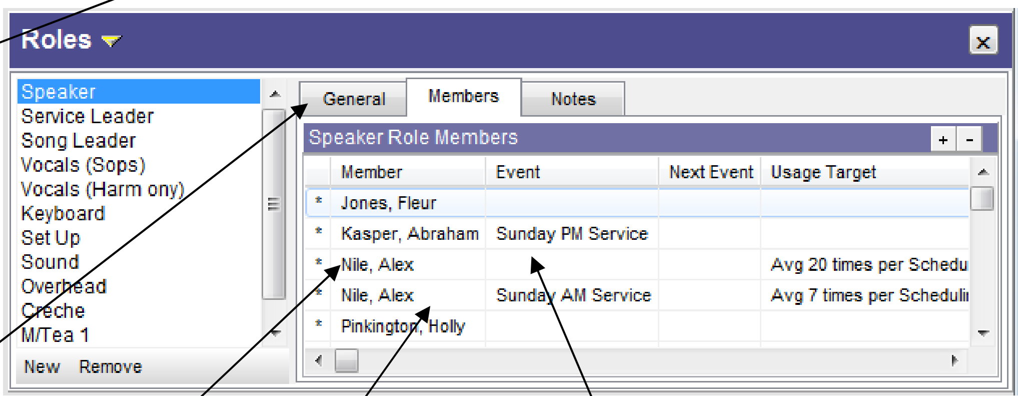
Deselecting **Schedule this role** *allows you to temporarily prevent a specific role from being included in the Schedules panel (and therefore being scheduled by the Automatic Scheduler)*

Double click on any event to edit any of these properties



By default, a new role is required by ALL EVENTS (i.e. will be required on all dates that all events require). By dragging events from the Events panel into the list box, **Applies to Events,** *you can restrict the events to which this role applies*

If there is a specific person with overall oversight of a specific role, drag their name into the Contact edit box. Their name will appear in the schedule for that role



Select the tab "General", "Members", or "Notes" to select which aspects of a role you wish to view and/or change

When you assign a person to the role, they appear in the Role Members list. You can also activate or deactivate them by ticking the check box in this window

Right click anywhere over the Role Members list to select either List view or Detail view (shown above) and whether or not to show the usage information (columns Target, Used, Hours)

A person may be required, or desire, to perform in their role with a certain maximum frequency. Double click on a person here to set their Usage Target*. This then sets the target for the Automatic Scheduler when attempting to fill the schedule for this role.*

Select "Display As" from the "Roles" menu to display roles as **Tabs** or in a **list box** (as shown above)

The Schedules Panel

Finally, we meet the intended outcome of all our hard work, the Schedules panel. Here we interact with the schedules themselves. We do so to:

- View the results of the Automatic Scheduler
- Manually add or remove people on the schedule – You can manually add a person by:
  > dragging them from the Role Member list box onto the Schedules grid (in default grid format)
  > dragging them around within the grid itself (from cell to cell) (in default grid format)
  > dragging them from the People panel directly onto the grid (in default grid format)
  > right-click in any cell and select from the pop-up menu
- Check for errors, omissions, or other inconsistencies
- Lock or freeze rows, columns, or specific cells to prevent the Automatic Scheduler from changing your manual input. To lock a column, click the top left corner of the top cell of that column. To lock a row, click the top left corner of the left-most cell of the row. To lock an individual into a location, click just to the left of the person's name.

See chapter 5 for details on creating and using Schedules.

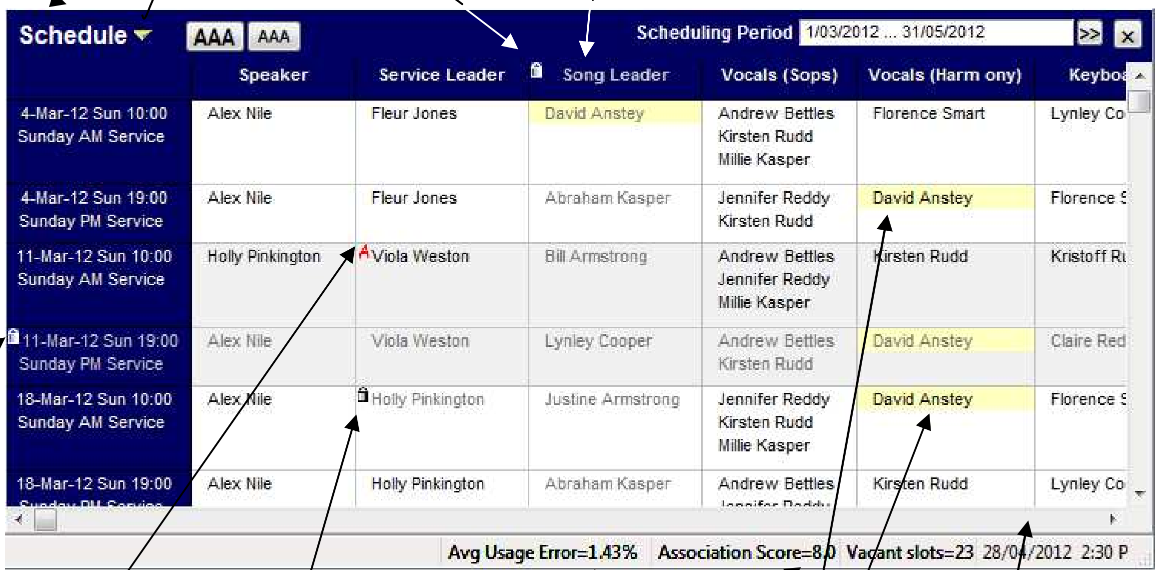
Clicking here can access the Schedules menu

*This lock symbol indicates that this **whole column** is locked and will not be overridden by the Automatic Scheduler*

Each role appears as a column in the Schedules grid

Set the current period for which you want to build a schedule by clicking on the down arrow.

Events are defined as a pattern or list of dates. This row corresponds to one event from that list. This cell tells you what date and time it is and the Event that it belongs to



*This lock symbol indicates that this **whole row** is locked and will not be overridden by the Automatic Scheduler. Notice that all the words the row appear in grey.*

The red *A* indicates that this person has an attendance flag attached. You can define and attach your own attendance flags and then create a report bases on who has what flags

This lock symbol indicates that Abraham is locked into this location and will not be overridden by the Automatic Scheduler. The name appears in grey, indicating it is locked

These numbers are a measure of how good the current schedules are (how well they meet Options and usage targets)

As you move the mouse pointer over names in the Schedules panel, the name currently under the pointer is highlighted in yellow everywhere it appears on the schedule.

The scroll bars allow you to view parts of the Schedules panel that are not currently in view

Alternate “Schedules panel” format

The alternate grid format has individuals as rows and the event dates as columns. It shows **roles** (using role abbreviation if supplied) as values in the grid cells.

This format is especially useful where a majority of individuals are scheduled many times within the schedule period. It it not as useful where you have a large number of people who are scheduled infrequently.

To select this format, choose menu **Schedules** > **Grid format** and select “**Dates by Names**” from the menu. Choose “Dates” to go back to the default format.

“Schedules panel” Date and Name format

You can specify the format of the **names** or **dates** that appear on either axis by choosing the **Schedules > Name format** or **Schedules > Date format** menu respectively.

By selecting Date format you can specify how SmartRoster displays the Event/Date/Time label. This string can contain:

<EVENT>	A literal token that is replaced by the event name
<COMMENT>	A literal token that is replaced by the event comment, if it exists for this event occurrence
|	A single "pipe" character which indicate a new line at this place in the event specifier
Format string	Strings of characters that substitute for date and time values. See: Date-time format strings on page 120.

Running Smartroster

You can run SmartRoster by selecting it from the start menu.

SmartRoster also offers a number of command line options for customising the default behaviour.

Command Line Options

To use command line options, you can edit the properties of the shortcut used to start SmartRoster by right-clicking on the shortcut in explorer and selection "Properties".

The Target should look something like this:

"C:\Program files\Davallia technology\Smartroster\smartros.exe" /FLAG1 /FLAG2 …

/FLAG options, also called switches (because they turn options on or off), can include the following..

Command line switch	Meaning
/READONLY	Any file opened in this session of SmartRoster cannot be changed. **Save** and **Save As** are disabled
/OPEN "{FILENAME}"	Starts SmartRoster and automatically opens the file named {FILENAME}. {FILENAME} (without the cirly brackets) is a fully qualified filename, like "c:\documents and settings\john\documents\ myfile.ros" This is effectively the same as if the user had opened the file via the **file > open** menu
/LOCK	Prevents the user from using the **New**, **Open**, **SaveAs**, **Open from web**, or **Save to Web** menus. They can only view and save the file passed in via an "/OPEN {filename}" switch. They can make changes to this file unless the /READONLY switch is also specified.
/IMPORT "{FILENAME}"	This automatically imports the file specified on the command line – either into the file opened via the /OPEN switch or into a new empty file. The file imported should be a recognised .CSV or .ros format

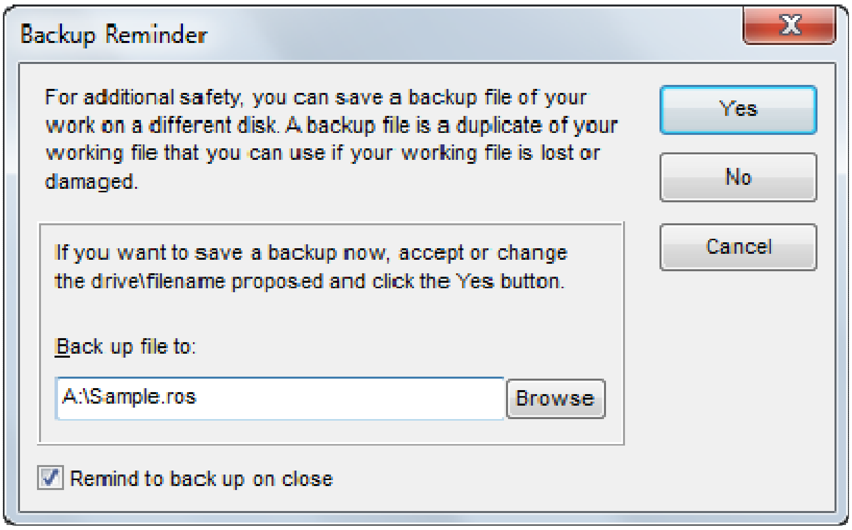
Exiting SmartRoster

You can exit SmartRoster in one of two ways:

- o Select the **File > Exit** menu,
- o Click on the **Close** button on the top right of the **SmartRoster** screen (the X).

Backup Reminder

When you close SmartRoster, you may be asked if you want to backup your SmartRoster file. As with all programs dealing with volatile data (ie data that change often), it is <u>highly recommended</u> that you regularly backup your SmartRoster file.



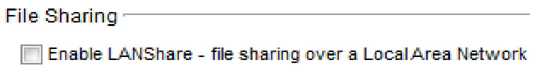
When you see this dialog, accept or change the filename showing in the "**Back up file to:"** box and click the **Yes** button.

Click the **No** button if you do not want to back up your file at that time.

If you do not want to be reminded, remove the tick from the **Remind to back up on close** check box. You can always re-start backup reminders by selecting the **File > Options** menu.

File Sharing

File sharing on a LAN



To enable file sharing, tick the "Enable file sharing protocol" check box which is located under the **File | Options** menu and the **Open & Save** tab.

Once file sharing is active, SmartRoster controls who may have "read-write" access to a SmartRoster file.

The first person to open the file will automatically be granted "read-write" access to the file. While the file is still open by that user, any subsequent user attempting to open the file will be granted "read-only" access and will not be able to over-write that file (although they will be able to "Save As" any changes they make to another file). They will know this is the case because the words "**READONLY**" will be appended to the filename in the SmartRoster title-bar .

When the original user closes the file, the next least recent user to open the file will be informed that they can have "read-write" access to the file if they re-load it (to pick up any changes made by the original user). If they accept then they will then have full "read-write" access. If they decline, then "read-write" access will be offered to the next least recent user to open the file, until someone accepts "read-write" access or no one is left.

SmartRoster WebShare

File sharing over the internet!

To enable file sharing over the Internet you need to , tick the "☑ Enable WebShare for file sharing over the internet" check box which is located under the **File | Options** menu and the **WebShare** tab. This will only be available if you have purchased at least two licenses. Annual support must be current to the Amazon S3 service (you can use your own FTP server without having current support).

When you activate WebShare you need to set up the various options. These are:

- **Read only on this workstation**
  If this is ticked then the workstation may be used to open shared SmartRoster files from the web but cannot save them back to the web.
- **Local Folder**
  This is a location on your local PC that SmartRoster can use to facilitate uploading and downloading of shared files.
- **Contact Name, Contact phone, Contact email**
  It is important that if you are to participate in sharing SmartRoster files that other users can contact you. You will not be able to save to the web or open web files for update until these details are provided
- ☐ **Use my own WebShare server**
  If ticked then this option allows you to define and use any web server you like, instead of our own Webshare server. You will need to obtain from your web server provider the details for connecting to it using FTP.   These items are required:
  - Web address: this is your FTP server name
  - User ID: your FTP user ID
  - Password: your FTP user Password
  - Port: this defaults to 21 but you can specify any port to use
  - Initial path: this is the actual folder on your FTP server into which WebShare will save SmartRoster files

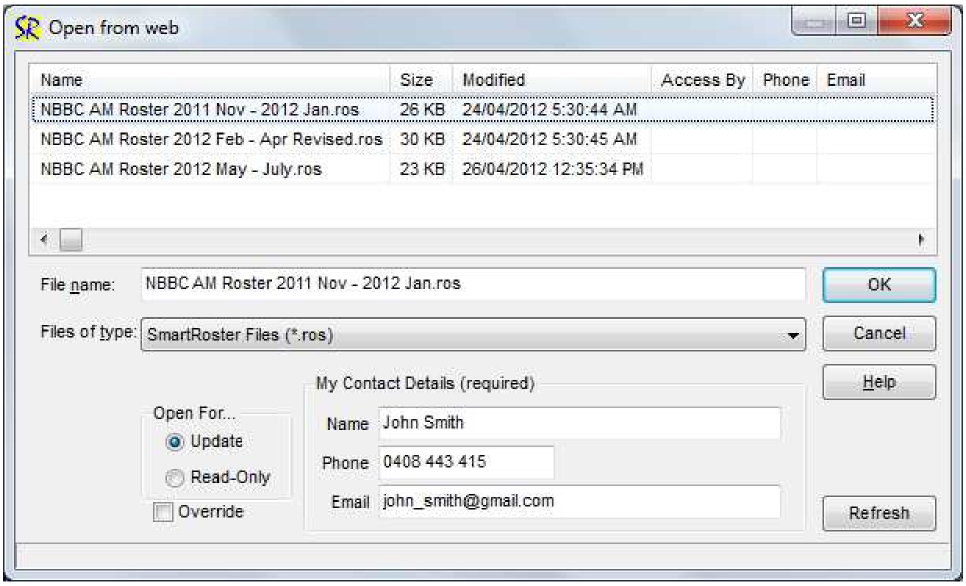
Once file sharing is active you will be able to open and save SmartRoster documents from either our high performance web servers or *from your own web server* – such as from your internet service provider.

WebShare functions

WebShare functions are accessed via the File menu.

File > Open from web…

This will open a WebShare connection and list all current SmartRoster files that have been placed into WebShare (for your organisation).



If a file is opened by someone else the details will be shown. You can open any file by clicking on it, and selecting **Update** or **Read-only** then clicking OK. This will download a copy to you local WebShare folder and open it up in SmartRoster. If you selected "Update" then SmartRoster will also flag that the file is opened by you for updating and no-one else will be able to open it for update until you release the file (by closing it or quiting SmartRoster). Once you have the file open for Update then every time your save using **File > Save** the file will be automatically re-uploaded to the WebShare server.

If you selected "Read-only", or the file was already opened by someone else for update, then the words "**READONLY**" will be appended to the filename in the SmartRoster title-bar. You will also know you are looking at a WebShare file because [WebShare] will appear in the titlebar just before the filename.

File > Save to web…

This will open a WebShare connection and list all current SmartRoster files that have been placed into WebShare (for your organisation). You can then select one of those files or enter in a new filename in the File name box to save the file to. Of course you cannot save to a file already open for update by another user. After saving the file you will automatically have update access until you close the file or close SmartRoster.

Note: "My Contact Details" are required to open or save a SmartRoster file to WebShare, except for opening in Read-only mode. Only those who have SmartRoster installed with the your registration details will have access to your SmartRoster WebShare folder, unless you use your own WebShare server and give your server logon details to someone else.

File > Reopen from Web…

This option allows you to easily re-acquire Update access to a SmartRoster file that you previously had open for Update (in a previous session). If you close and re-open SmartRoster after having a WebShare file open, SmartRoster will automatically re-open the document (if "Open Recent" is ticked under the Open and save options) in Read-only mode. If you then select **Reopen from Web** SmartRoster will attempt to open a WebShare connection and open the file for you in Update mode. If someone else has already opened it for update then you will be notified who this is and have the option to contact them if your need is more urgent.

WebShare Messages

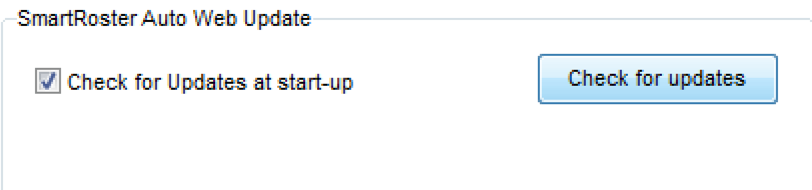
Any time you perform an action that invokes WebShare you will know this is happening because a small information dialog opens in the lower right of you screen. It looks like this:

You will be able to tell what is going on at any time if you look at these messages.

If your Annual support subscription expires, you will not be able to access our WebServers until support is renewed. However your data will be preserved.

Automatic Updates

SmartRoster provides a very simple facility to automatically poll for and download updates. Select menu File > Options.



Tick the check box "Check for SmartRoster Updates at start-up". Now everytime you run SmartRoster, if you are connected to the internet, SmartRoster will check to see if an update is available and give you the option to download it.

Even if you do not have automatic updates activated, you can manually check at any time for updates by clicking on the button "Check for updates".

If an update is available you will be informed of this and given the opportunity to download and install it – all automatically!

CHAPTER 2
Setting up

How do I get started?

Chapter Contents

Before you can start using SmartRoster's powerful scheduling features, you need to install SmartRoster, and set up your SmartRoster file, your role details, your people records, and your events. This chapter will walk you through all the major steps.

System Requirements

To use SmartRoster, you will need the following equipment and software:

- An IBM or compatible computer with a Pentium 100 MHz processor or better.
- MS Windows 98, 2000, NT 4 Service Pack 5 or higher, or Windows XP.
- Minimum of 64 MB of memory (RAM). We recommend 128 MB for optimum speed, especially if you have more than 200 personnel records.
- A hard disk with at least 15 MB of free disk space.
- 1Mb Video Card and monitor capable of 800x600 and 256 colours. However a 2Mb Video Card and monitor capable of **High Colour (16 bit) resolution is highly recommended.**
- A printer supported by your operating system, preferably a page orientated printer such as an ink jet, bubble jet or laser printer.
- Optional CD-ROM drive.
- Optional Microsoft Internet Explorer and an Internet connection are required for Internet updates, and for accessing Internet information sites such as SmartRoster's website www.smartroster.net .

Installing SmartRoster

How do I install SmartRoster?

Installation of SmartRoster is easy. In most cases, all you have to do is insert the SmartRoster installation CD in your CD-ROM drive and follow the onscreen instructions.

1. Before you start the installation process, you should shut down all running programs. You may want to shut down your virus protection program, because some virus protection programs can interfere with installation.
2. Place the SmartRoster CD into your computer's CD-ROM drive and close the tray.

   In most cases the installation should start automatically. If it doesn't then:
   1. Double-click on the **My Computer** icon on the Windows desktop.
   2. Double-click on **CD ROM drive** icon (this may be D: or E: drive).
   3. Double-click on the file that is called "Setup" or "Setup.exe".

3. Windows will start the installation, and display the *Davallia Technology Software License Agreement*. Click **Yes** to accept this and continue.
4. When the *Choose Destination Location* window is displayed, make sure that the drive and path are correct and that there is enough space on the hard drive to install SmartRoster. By default, SmartRoster creates a folder named C:\Program Files\Davallia\SmartRoster and installs the program to that folder.

   In most cases, you don't need to change the directory. To change the destination drive or path click **Browse**, and change the destination folder on the Choose Destination Location window. When the path is correct click **Next**.
5. The *Select Program Folder* window will be displayed next. Use this window to put the program where you will be able to find it! You can open an existing folder or create a brand new folder if you wish.
6. SmartRoster will now display the *Start Copying Files* window, which displays the progress of the installation process. To start the installation process you need to click **Next**.
7. When installation is complete, the **Installation Completed** window is displayed. Click **Finish** to continue. SmartRoster is now installed to your computer.
8. To start using SmartRoster click on the icon you have installed.

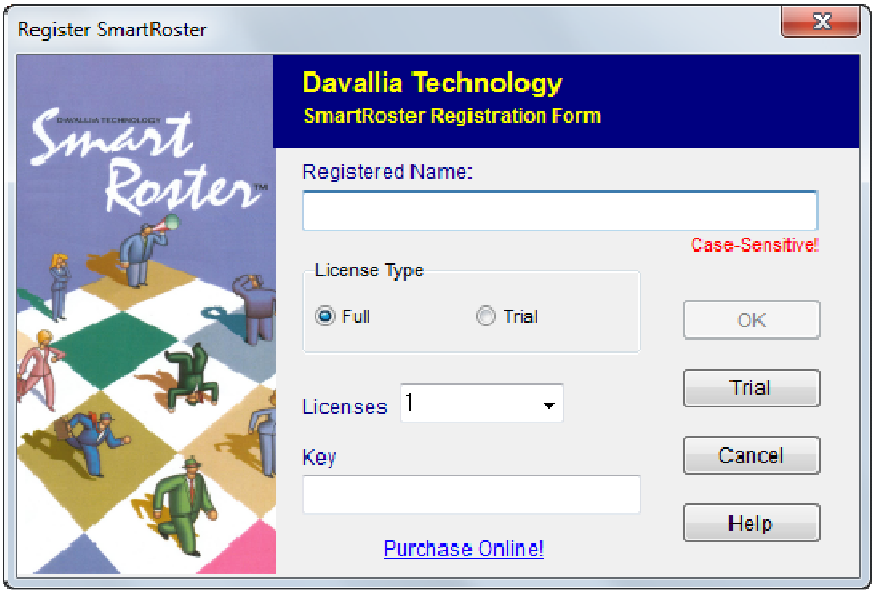
Registering SmartRoster

SmartRoster must be registered within 30 days of installation. If you are using the program on a trial basis, it will cease to operate after 30 days, until a registration key has been entered.

A registration key is obtained when you purchase SmartRoster. Each time you reinstall SmartRoster, you need to re-enter your registration key, so it is a good idea to keep the key somewhere safe.

To register SmartRoster

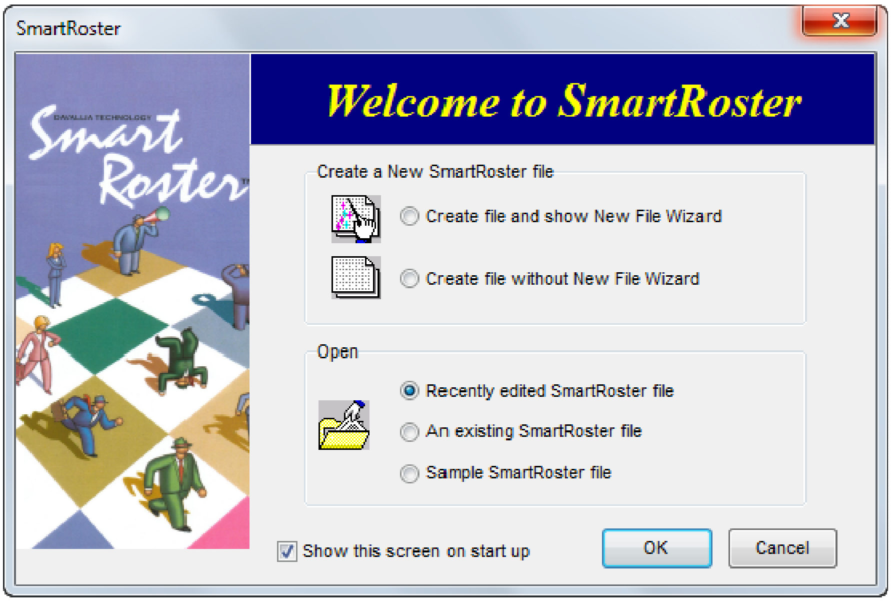
1. Obtain your registration key. This can be done in one of two ways:
   - On purchase of the packaged SmartRoster product you should find the registration key on the envelope containing the CD ROM. If not then send us your details including proof of purchase and it will be mailed or emailed to you; or
   - On purchase of a copy of SmartRoster by download from the Internet, a registration key is automatically generated when your payment is approved, and will be sent to you by email; or
   - If you decide during or after your trial of SmartRoster that you wish to continue using this product, you need to send payment in full to the address provided with the product (check out the web site for details). A registration key will then be generated and sent to you by return mail or email, as you prefer.
2. Access the registration window. Either:
   - Use the registration window that is automatically displayed whenever you open an unregistered copy of SmartRoster; or
   - Click **Register**! on the menu bar (only visible if you have not registered previously).



3. Enter the **Registered Name:** as it appears in your registration info.
4. Select either Full or Trial and then enter either the number of licenses you have purchased or the number of trial days, as appropriate.
5. Enter your key in the **Key** field and click **Register**.

Getting Started with SmartRoster

The first time you start SmartRoster



Each time you open SmartRoster, the *Welcome to SmartRoster* window will appear, giving you the option to create a new SmartRoster file (with or without the **New File Wizard**), or open an existing file. This screen only appears when you open SmartRoster. However you can always create a new file or select an existing file from within SmartRoster by using the file menu.

Opening an existing SmartRoster file

Opening the sample file

If you are using SmartRoster for the first time, you may want to open the sample file, which you can use to get a better feel for the program before you start to create your own file. To open the sample file:

1. From the Welcome dialog, or from the **File > Open** menu, choose **Sample SmartRoster File.**
2. Click OK.

This will open the file Sample.ros, which is installed in your program directory.

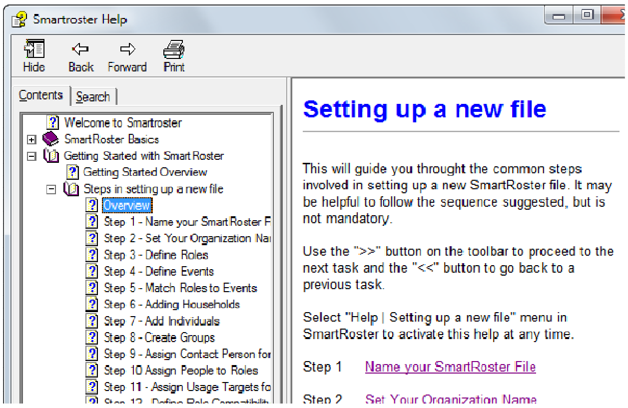
Use the sample file to explore SmartRoster. You can do anything you want in the sample file - enter data, run reports, and try all the features. When you're ready to set up your own SmartRoster file, simply choose the **File > New** menu.

Opening an existing file

If you've already created a SmartRoster file and you want to keep working on it, just select "**Recently edited SmartRoster file**" and click OK.

If you want to open a different file, select "**An existing SmartRoster file**" and click OK. Then select a file from the **Open** dialog box.

Setting Up A New SmartRoster File



If you haven't yet set up your SmartRoster file, select "**Create New File and show New File Wizard".** This will open up the SmartRoster help file at **Setting up a new file.** This takes you step-by-step through the process of creating a new SmartRoster file.

The **New File Wizard** shows you how to enter details such as:

- Organization name;
- People, Households, or Groups;
- Events and Roles.

In addition, you can import the details about your people from another source.

Setting up a new file.

Step 1 Name your SmartRoster File

Save your file before you continue any further.

1. Select the **File > Save as** menu
2. Type in the file name to save it as.
3. Click on the **Save** button.

It is recommended that you save your work at regular intervals. SmartRoster can do this for you.

<u>To activate automatic file saves:</u>

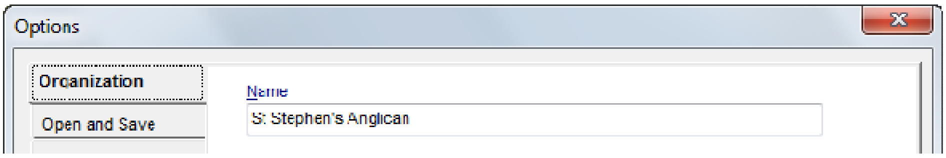
1. Select the **File > Options** menu and click on the **Open & Save** tab.

2. Tick the **Auto-Save** check box.
3. In the **Every ___ Minutes** box, type in the number of minutes to save your work and Click OK.

Step 2 Set Your Organization Name

Set the name of your organization. This name will appear in the header of most reports generated by SmartRoster.

1. To set your organization's name select the **File** > **Options** menu.



2. Fill in your organization name in the box called **Name**
3. Click on the OK button

Step 3 Define Roles

1. Select the **Role > New** menu
2. Type in the name of the new Role and press the <Enter> or <Tab> keys
3. Click on the **General** tab
4. Double click on "<All Events> and enter the number usually required for this role (the default). You can also enter the number of times to block-schedule a person in this role (eg 2 weeks in a row). Don't worry about the other options just yet. If unsure, you can change it later anyway. Click OK to continue

Repeat steps 1 to 4 for many roles as you need to create.

Step 4 Define Events

Events are the meetings that your church or club schedules which may occur regularly (say, each Sunday or Annually) or may be a one-off occasion.

1. Select the Events | New menu.
2. Type in a name for it (e.g., Family AM Service).
3. If it is a repeating event (like a weekly Sunday Service), select the repeating pattern from the tabs presented (eg Daily, Weekly, Monthly). If it is a specific date/time select the "Adhoc" tab and define the actual date/times and add them to the Include list.
4. Click Add to add each pattern or adhoc date into the list of dates for this event. Repeat step 3/4 for each additional pattern or date/time.
5. Click OK when you've finished defining the event.

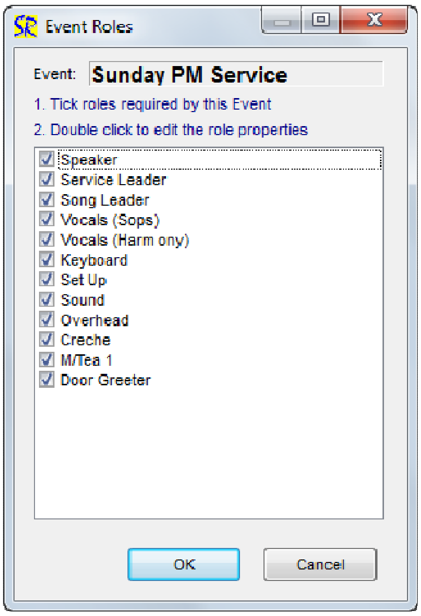
Repeat steps 1 to 5 for additional events.

Step 5 Match Roles to Events

Now that you've defined your Events (services, etc) as well as your Roles, you need to tell the program which Roles are required by which Events.

There are two ways to do this (it doesn't matter which you choose).

To define all ROLES for a specific EVENT:



1. Open the Events panel (it is probably already open) and double-click on an event.
2. Click on the **Roles** button.
3. Tick the box next to all roles required by this event.
4. You can also select for each role how many people are needed to serve in that role for that specific event. Also you can indicate whether, for a specific role, to always schedule the same person on consecutive occurrences of the event (eg, two weeks in a row). Just click on a role and then enter the details to the right.
5. Click OK twice.

To define all EVENTS for a specific ROLE:

1. Open both Events and Roles panels (using the Toolbar buttons).
2. Select a Role tab for which you want to define valid events. Select the "General" tab for that role.
3. Click on an event, and while holding down the mouse button drag it into the **Applies to Events** box in the Roles panel.
4. Once again, you can set the number required to serve, and number times to schedule consecutively (see note 4 above).
5. Repeat steps 2-4 for all events that apply..

It’s now time to enter your People records.

If you already have people records in an existing database, you can import these directly into SmartRoster. For more details on how to do this see page 50 of this manual.

You may like to hide all panels and show the *People* panel. To do this, make sure that only the **People** button is depressed on the Toolbar.

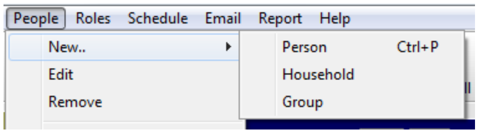
This same panel can show:

- **Individuals** (select **Show Individuals** from the **People** menu)
- **Households** (select **Show Households** from the **People** menu)
- **Groups** (select **Show Groups** from the **People** menu)

We normally start by entering Household records, as these are needed when you enter individual’s records next (but you can ignore households entirely if you wish and proceed to Add Individuals)

Step 6 Adding Households

1. Select the **People** > **New** > **Household** menu
2. Type in the household name.



3. Select the Household Association from the **Household Association** drop-down box.
   (This allows you to define whether members of the household prefer to be, or NOT to be, scheduled for the same event). If an individual in the household has a different preference, you can select that when you enter the individual’s details later.
4. Enter the household address, email, and phone numbers.
5. If household members can only be scheduled onto certain events, add those events to the **Events** list by selecting **Events** tab.
6. If you already know when this household is to be absent you can add the absences by selecting the **Absences** tab.
7. When you're done, click **Save.** Repeat 2 to 7 for more households or **Close** to quit.

Step 7 — Add Individuals

1. Select the **People** > **New** > **Person** menu
2. Type in the person's Last name, Preferred name, Initials, and DOB.
3. Select a household record for this person from the pull down list under **Household.** This attaches the household information to this person's record, and marks this person as belonging to the selected household.
4. Enter the individual's address, email, and phone numbers ONLY if different to the Household.
5. Update the **Events** list only if different to the household record.
6. Update the person's absences if known and different to the household record.
7. When you're done, click **Save.** Repeat 2 to 7 to add more individuals or click **Close** to quit.

Step 8 — Create Groups

Group definitions allow you to apply constraints, such as absences, to groups of people simultaneously. Groups are optional, and you can add them later if you want.

1. Select the **People** > **New** > **Group** menu.
2. Type in the name of the group.
3. Select the Group Association (whether group members prefer to be, or not to be, scheduled on at the same time).
4. Enter the group's contact details.
5. As per Households and Individuals, update the Events for this group.
6. Now add the actual members. To do this, select the **Members** tab. Click **Add.** Select the members you wish to add and click OK.
7. When you're done, click **Save.** Repeat 2 to 7 to create other groups or click Close to quit.

Step 9 — Assign Contact Person for Role

The Role Contact person is usually a team leader or coordinator responsible for that role. This person is listed on Schedule reports at the head of their respective schedule. You do not have to assign a Role Contact.

To assign Role Contact:

1. Open the People and Roles panels (You may need to change to **Individual View**)
2. Select a Role tab for which you want to assign a contact person.
3. Drag and drop the contact person's name from the People panel to the **Contact** field in the Roles panel.

Step 10 Assign People to Roles

Now that you've defined your Individuals as well as your Roles, you need to assign Individuals to Roles. These are called Role Members.

There are two ways to do this (it doesn't matter which you choose).

Using the Role Members context menu:

4. In the Roles panel select the role tab to which you want to add members. Click on the "Members" tab for that role.
5. Right-click over the Role Members list and select "New Member" from the menu.
6. Select all the names you wish to make a role member (use <Shift> and <Ctrl> while clicking on a name keys to select multiple names)
7. Click OK

Using drag-and-drop:

8. In the Roles panel select the role tab to which you want to add members. Click on the "Members" tab for that role.
9. Show the People panel
10. Drag names from the open people panel into the Role Members list

Step 11 Assign Usage Targets for Role Members

A usage target defines how often in a given period a person will be scheduled to a given role. A person can have a different usage target for each role to which they belong.

The Automatic Scheduler attempts to fill each schedule so as to meet any individual usage targets provided. Where usage targets are not provided it tries to even out the usage as much as possible between all members who do not have such targets.

To assign a usage target:

1. In the Roles panel double-click on a person whose usage target you wish to set.
2. Tick the **Usage Target** check box.
3. Enter the details as appropriate for this usage target.
4. Optionally select the Event to which this applies (by default, All Events)
5. Click OK.

Step 12 Define Role Compatibility

By default, when a person is scheduled to perform in a certain role during an event, the Automatic Scheduler will not schedule them onto any other role during that same event. This means that, by default, all roles are incompatible.

This may not always be the case, and you can indicate two roles are compatible (i.e. the same person can fill both roles at the same time).

To indicate two roles are compatible:

1. In the Roles panel click the tab of one of the roles to be made compatible (the "General" tab should also be selected). You will see a **Compatible Roles** box. Click on the **Add** button. A list of Roles will be presented. Select the role to be made compatible with this one. That role will be added to the list of compatible roles.
2. Now **right-click** on the Role you just added (in the list), and select compatibility strength.

   Note: where compatibility strength is selected, the Automatic Scheduler will actively try to put the same person in both roles, where a person is on the list for both roles.

Step 13 Absences

You can enter absences for an Individual, a Household, or a Group. Entering an absence for a household will apply to each person in the household, and similarly for groups. Try to assign absences to a group or household if appropriate, before assigning to individuals.

To enter absences:

1. Open the People panel and double-click on the person (or household or group) and then select the **Absences** tab.
2. To define a new absence, click on the **Add** button.
3. To edit an existing absence, double click on the absence.
4. To delete an absence click on it once and click on the **Delete** button.
5. Click **Save** to update the absences (click Cancel to cancel any changes)

Step 14 Personal Associations

For many reasons, some people prefer to be scheduled on the same events as other people, and some prefer not to be. For instance, a couple with small children may prefer not to be scheduled at the same time for childcare reasons.

To add personal associations:

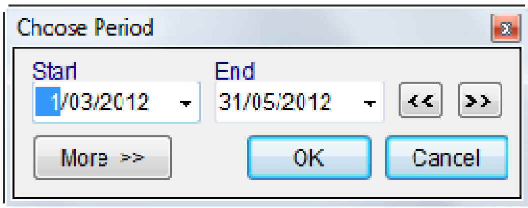
1. In the People panel, double-click on the name of the person whose association you wish to add.
2. Select the **Associations** tab.
3. Click "Add" to create a new association
4. Fill in the fields as requested in the Edit Association dialog
5. Click the **Add** button.

That's all there is to it. You can add as many other associations as you wish in the same way for this person, or click **Save** to finish.

Step 15 Set the Schedule Period

Now you need to set the period over which you are creating the schedules.

1. Open the **Schedules** panel if it is not currently visible.
2. Click on the down arrow next to **Scheduling Period:**
3. Click on the down arrow next to **Start** or **End** to set the start and end dates for the scheduling period.



The arrow buttons **>>** and **<<** can be used to advance the date range based on the current date range to the next (or previous) period equivalent in duration. Click "More >>" to access the look-back days functionality (p.62).

Step 16 Assign Manual Schedule Entries

At this point you need to add any manual entries into the schedules. You would do this where you want to fix a person to a schedule position, thus preventing the Automatic Scheduler from assigning this position.

To do this:

1. Have the Roles and Schedules panels open.
2. Select the Role you want to use. Select a member from the **Role Members** window, and drag the name into the desired position on the schedules (normally into the same Role column).
3. Lock the person into that position by clicking once immediately to the left of the person's name in the cell. A small lock symbol will appear.

You can allocate as many positions as you wish - even the entire schedule if you want!

Caution: When allocating positions manually it is possible to override all constraints except for absences.

You can also take names directly from the People panel and drop them into positions on the schedules, even if they are not members of the respective role (a guest speaker, for instance).

You can also right-click in any cell and choose from a list of people to enter into the cell.

Step 17 Fixed Schedule Entries

Typically, you will manually add entries to most, or even all, positions of some roles (such as the Speaker or Preacher role, which would rarely be automatically allocated) and you may even allocate all roles for SOME events (like a special memorial service or holiday). SmartRoster allows you to lock in a whole Role (column) or Event (row) at a time. Locking a row, column, cell, or person in a cell will prevent the Automatic Scheduler from allocating or changing that row/column/cell/person.

To lock a column (Role):

Click once immediately to the left of the top-most cell of the column. This will be the cell that has the Role name in it. A small lock symbol will appear.

To lock a row (Event occurrence):

Click once immediately to the left of the left-most cell of the row. This will be the cell that has the Event date/time and name in it. A small lock symbol will appear.

To lock a cell:

Right-click in the cell. Select **Lock Cell** from the popup menu. The text of the cell (if any) will appear greyed out.

To lock a person in a Cell:

Click just to the left of any name in any cell. A small lock symbol will appear next to the name, indicating it is locked.

To unlock a single cell, row, or column:

Click once on any lock symbol remove the lock, or right-click on the cell, row or column.

Step 18 Pre-build Check List

You are almost ready to build your first Schedule!

Before you do, check that you have all necessary information:

- ❑ Have you added all absences?
- ❑ Have you added personal associations?
- ❑ Have you added Household Associations?

  If all household members want to be scheduled on the same day, open the household record and set the Household Association box.
- ❑ If all household members want to be scheduled at the same service on any given weekend, open the household record, select the Usage Target tab and set the Enforced Break to 2 days, and click "Applies between members as well as to each member"
- ❑ Have you set usage targets for Role Members (where this is known)?
- ❑ Have you manually added and locked in schedule entries where desired?

Remember: you can lock a whole row or column at a time.

Step 19 Building your first schedule!

You are now ready to use the Automatic Scheduler.

The Automatic Scheduler will fill all time slots not already assigned (and locked in). It will attempt to match as many constraints as possible while also meeting usage targets.

1. Click **Auto Fill** on the toolbar or select the **Schedules > Auto Fill** menu.
2. Decide whether the Automatic Scheduler should bias towards meeting usage targets, associations, filling vacancies and in which order.
3. Now tell the Scheduler when to stop trying to improve the schedule.

Auto Fill Term	Meaning…
Iterations exceed	Stop after generating this many schedules
Time Exceeds	Stop the Automatic Scheduler after this many seconds
No improvement after	Stop the Automatic Scheduler if it has not improved the schedule after this many attempts

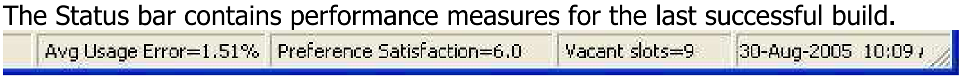
(Ignore the other options for now)

Once you have set these Auto fill options, click **Start** to begin building the schedule.

Step 20 Review your Schedules

A number of tools are provided to help you review the quality of your schedule.

1. Show Usage for persons and role members (right-click in the People panel and select **Show Usage**, or select **Show Usage** on the Roles menu) The number immediately to the left of each of the names in the People panel or Role Members panel tells you how many times that person has been allocated in the current schedule.
2. As you move the mouse pointer over the schedules grid, it will highlight the name of the person currently under the mouse pointer everywhere that person is allocated.
3. New *Smart*Explain technology explains, with a message in the status bar, why you cannot drop people into the schedule.
4. The Status bar contains performance measures for the last successful build.



Avg Usage Error is the average difference between the usage targets for each individual role member, and that actually achieved by the scheduler (0.0% is the target). **Association Preference Satisfaction** is a measure of degree to which associations have been satisfied (Larger is better). Vacant slots indicates the number of slots SmartRoster could not fill.

5. Select **Schedules** from the **Report** menu to create Household or Individual Schedule reports. You can then flip through these reports for each household, and review the suitability of the current allocations.

Congratulations!

You have finished building your first schedule. What you might now like to do is:

- Appraise the result and re-run the Automatic Scheduler. For example, you might find that only a part of the schedules is satisfactory. You could try locking it down before re-building.
- Once you are happy with the result, check out the various kinds of reporting options you have (select **Schedule** from the **Report** menu).

Finally, remember to consult the rest of this user manual, which has important information on many aspects barely touched on or not even mentioned here.

CHAPTER 3
Managing People

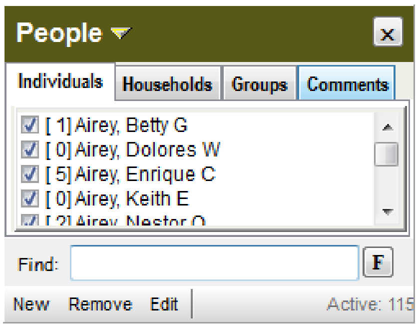
Managing your People Resources

Chapter Contents

People are the most important asset to any organization. You will want to create a schedule that is sensitive to the needs of your volunteers. This includes *when* they are available, *what* roles they are able to fill, *How often* they are available, and with *whom* they prefer to work. A better schedule will make best use of your valuable volunteer workforce.

Introduction

You manage people via the People panel. (See page 14). The People panel can be viewed by clicking on the **People** button on the toolbar, or selecting the **View > View People** menu.



People can be viewed as:

- Individuals
- Households, or
- Groups

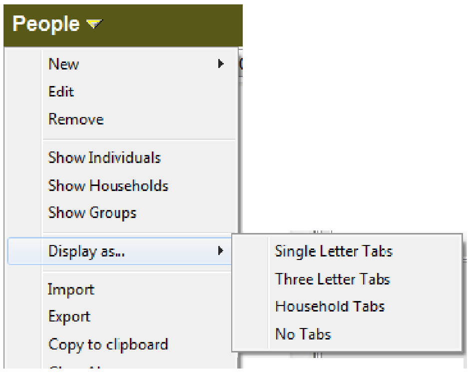
by selecting the appropriate tab on the People panel. Anything that applies to an individual can also apply to a household or group. Any preference that is defined for a household or group applies to each individual in that household or group.

Households are groups of individuals that live in the same household, and usually have the same last name. An individual can belong only to one household, but to many groups.

Groups are arbitrary groupings of individuals (or even groups of households) and can be used to apply constraints (such as absences, associations preferences, or applicable events) to a number of individuals at a time.

SmartRoster treats individuals, households, and groups in virtually the same way. the process of adding or editing individuals is very similar to that for households or groups. Because of this, in this manual, the word **Person** can mean **Individual, Household, or Group** unless otherwise indicated. "Individual" always refers to a single person but never to a household or group.

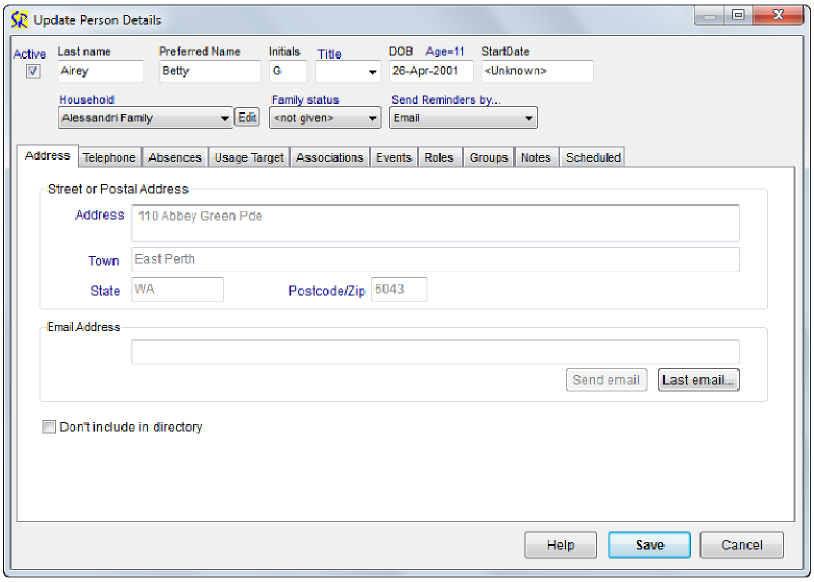
The People Menu



Most of the management functions you will need to perform on individuals, households or groups can be accessed from the dropdown **People** menu.

New	create a new **Person**
Edit	edit the **Person** that is currently selected
Remove	delete the **Person** that is currently selected
Show Individuals	change the People panel to display only individuals
Show Households	change the People panel to display only households
Show Groups	change the People panel to display only groups
Display as…	change the tabs that appear on the people panel to single letter, three letter, household, or no tabs
Import	Import people from a tab-delimited format file
Export	Export people in tab-delimited file format
Hide(Show) Usage	Hides (or shows) the number of times each person is used in the current Schedules, as a number in square brackets [*x*].

Adding a New Person



Select the **People > New > Person** menu. The top section includes basic name and household details. The following tabbed control contains both contact details and schedule preference information.

The **Household** field can be selected from the drop down list. If you are adding a person and have not created the person's household record you can click on the **Edit** button and fill in the details of the new household, then come back to this window and select the household record you just created from the drop down list.

A person's household address and phone details will appear as greyed text in the appropriate fields of the individual record, reminding you of information already available for the household. Only over-type it if the individual's details are different to that of their household details.

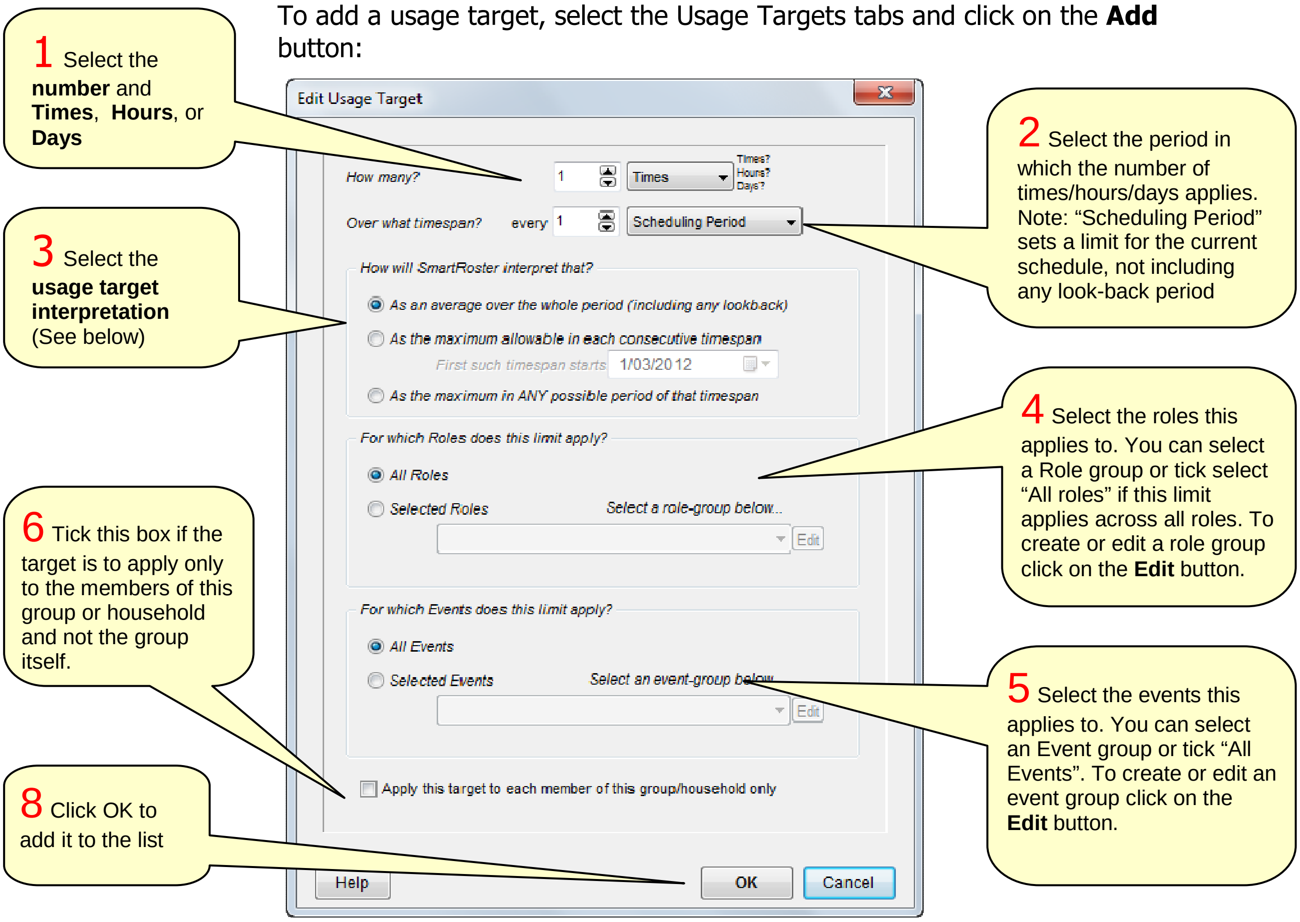
Field	Description
Active	Tick this box to make this person record active. Only active records will be automatically placed into a schedule by the Automatic Scheduler.
Last name (Required)	Usual Surname this person uses. This does not have to be the same as the household selected in the Household drop down box (below).
Preferred name (Required)	An individual's preferred first name.
Initials	An individual's middle initial. Use this if two people have the same first and preferred names.
DOB	Date of Birth. This can be entered in any format. Year is not required. Used by the Birthday report function, and also reports date of birth in the address book.
Household	Select an existing Household record. You can create a new household record on the fly by clicking the lookup button. A person can only belong to one household.
Family status	Select either Father, Mother, Son, Daughter, Grandmother, Grandfather, Adult male, Adult female.
Start Date	Enter the date a person starts. SmartRoster will know not to schedule them before this date, and will adjust automatic usage targets accordingly
TABS	SmartRoster uses different tabs to store the different kinds of information. Just select the tab to access the information stored in that tabbed page.
Address	Street and email address information. Email is used for automatic reminders. Tick "Don't include in directory" to exclude this person or household from the address list report.
Telephone	Work and home phone numbers, including fixed line, fax, and mobile.
Absences	Update a persons absences in this tab.
Usage Target	If you want to set a usage target that will apply to this person across all or multiple roles, do so here. Also you can enter an Enforced Break for this person, and set a pre-assignments.
Associations	Set "prefer to be with" or "prefer not to be with" associations for this person.
Events	Set the events for which this person may be scheduled, and the event priorities for this person.
Roles	Shows the roles for which this person can be scheduled.
Members	This tab is visible if this is a **household** or **group** record. Add or delete members of the household or group.

Notes	Allows you to enter any arbitrary notes about this individual or household/group record
Scheduled	This tab shows all scheduled timeslots for the person being edited, similar to the email reminder format

Usage Target

Adding a usage target provides a limit which is used by the automatic scheduler when scheduling this person.

To add a usage target, select the Usage Targets tabs and click on the **Add** button:



To change an existing usage target click on the target in the list. Then click the **Edit** button. Change the settings as required and finally click the **OK** button.

To delete an existing usage target click on the target in the list. Then click the **Delete** button.

Note: if you use a role-group or event-group then the limit will only apply within the roles or events specified for the role or event group. They will not limit how many times they are scheduled in other roles or events.

Usage Target Interpretation

"Average over whole schedule" applies the limit as an average across the whole schedule period including any look-back (this was the default behaviour prior to SmartRoster v2.5). This is the least restrictive interpretation. In this case the actual usage will approach or equal the usage target set here. Note a person could be scheduled many times in a row and have large gaps, while the average is still within the limit set. If that's OK then this option may be suitable.

"Max for **each** … period" applies the limit strictly to each contiguous period (each 6 week period in this example). If this is selected then you will need to provide the starting date of the first such period (the beginning of the first 6 week period, in the above example). This is a more restrictive interpretation.

"Max in **any** … period" limits the number or times scheduled in *any* period of the given length, *regardless of when the period begins*. Starting date is therefore *not* required. In this case the actual usage averaged over the whole schedule will be less than the usage target set here. Hence this is the most restrictive interpretation.

Usage targets for Households or groups

When adding a usage target for a household or group you will also see a tick box **Applies to Members only.**

This tick box allows you to easily apply a usage target to each member of the household or group (as if you went in to each member individually and created the same usage target for them) rather than the household or group itself.

If you tick this box then you will see the usage target in the list with ****Members Only**** appended. This usage target will then limit the number of times each member individually can be scheduled, but NOT limit the household or group specifically.

If you have not ticked this box then the usage target will apply to this group or household as a whole. That is, this usage target will limit the sum total timeslots in which its members are scheduled. It will NOT put a specific limit on any single member alone.

Enforced Break

Setting **Enforced Break** for a person, household, or group instructs AutoFill to guarantee a break of the specified hours between successive timeslots for that entity. If specified for a group or household then the enforced break will apply to each member of the group or household. For instance, to prevent a person being scheduled at more than one event during a weekend, enter an Enforced Break of 48 hours.

If **applies between members, as well as to each member** is ticked, then if *anyone* in the group (assuming this is a group) or household is scheduled then no one else in the group will be scheduled within the enforced break period of this person. They may still be scheduled to the SAME event (same time period regardless of role). This is useful for insuring, for example, family members do not serve on different services on the same weekend, if they serve at all.

> Note: The usage target "2 times every 4-weeks" tells AutoFill to try to schedule the role member so that, over the whole period (including the Look-back period if set) the person will be scheduled in that role AN AVERAGE OF 2 times per 4-week interval. ie, if the period is three months, then it will try to schedule the person about 6.5 times over the whole period (2x13/4). Although SmartRoster will try to even-out this usage, these times could be all in the first two months, and they could (in the worst case) be consecutively. So, "2 times every 4-weeks" does **not** mean "every other week". IF you want to skip every other week (for instance) then you should also use the enforced break for that role member, and set it to (say) 13 days. This will guarantee the break as desired.

See also, Global Enforced Break page 123, Role Member Enforced Break page 59.

Pre-assignments

Pre-assignments are a way of manually scheduling a person in a specific pattern that you set, rather then letting the automatic scheduler schedule them. You can do this for a role member in a single role, or for a person across a group of roles, or across all roles.

Role-member pre-assignment

You may pre-assign a role member to the schedule by ticking the **Use pre-assigned schedule** box in the role member dialog. Click "Edit" to define the fixed pattern for scheduling this person in this role, in the same way you set up an event pattern. Once pre-assigned, you will see this person shown in green in the relevant timeslots in the schedules grid.

Tick "Pre-assigned and manual scheduling only" to tell SmartRoster to NOT assign any other timeslots to this person in this role. To remove the pre-assignment untick the "Use pre-assigned schedule" box.

Person preassignment

You may assign a person to a specific schedule across a number of roles for that person. Open the person's record by double-clicking on the person in the people panel or in the schedules grid. Click on the "Usage Target" tab. In the bottom right of this tab you will see a checkbox labeled "use pre-assigned schedule" (If this box is greyed out then that person has not been allocated to any roles yet). Tick this box. Click the large "Edit" button to define the fixed pattern for scheduling this person, in the same way you set up an event pattern. Then select either <All Roles> or a role group from the "in roles" drop down box. SmartRoster will schedule this person in the pattern you specified, selecting the role to put them in from the roles you specified, trying to achieve the closest match to the person's usage targets.

You can define role groups by clicking on the Edit box next to the role groups "in roles" drop down box.

Tick "Preassigned and manual scheduling only" to tell SmartRoster to NOT assign any other timeslots to this person in this group of roles (or all roles). To remove the preassignment untick the "Use preassigned schedule" box.

Note: SmartRoster will also try to fulfil role and keep-together associations when allocating this person in the preassignment pattern specified. It will not break mandatory role compatibility or association preferences unless you have de-selected **Enforce associations when manually scheduling** under Options: Other settings. Preassignments are considered to be a shortcut form of manual scheduling.

Association preferences

Associations

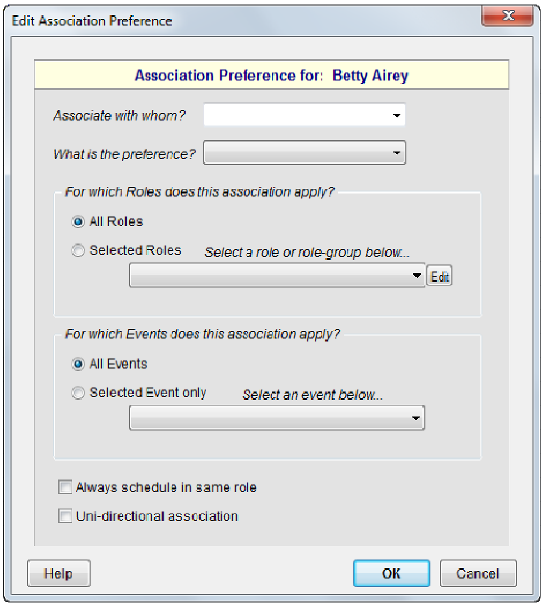
- Always keep apart
- Strongly prefer apart
- Mildly prefer apart
- No preference
- Mildly prefer together
- Strongly prefer together
- Always keep together

The Associations tab is where you define association preferences for this person.

Possible associations are shown in the box to the left.

SmartRoster will always obey an **Always keep apart** and **Always keep together** association although you can override this by manual changes to the schedule. The stronger the association, the more likely it is to be satisfied.

To add an association



1. Click on the Add button. You will see this dialog:
2. Select the person next to "associate with whom?"
3. Select an association from the "What is the Preference"
4. Optionally you may qualify the association by indicating it only applies to certain Events or Roles/Role-Groups. To do this select the Event and/or the Role or Role-Group from the relevant boxes.
5. "Always in same role" means the association will only apply if both people are in the same role. Note, if the preference is "always together" then they both should be members of the same roles.
6. "Unidirectional association" means the association will only applies to the person names in the title: **Association Preference for:** It will **not** apply to the person selected in the **Associate with whom** drop down box.
7. Click the **OK** button to add the association and **Cancel** to cancel the addition.

To change an association

1. Click on an association in the Personal Associations list (the main list) and click the Edit button.
2. Make any changes as you wish to the association
3. Click the **OK** button to change the association and **Cancel** to cancel the change.

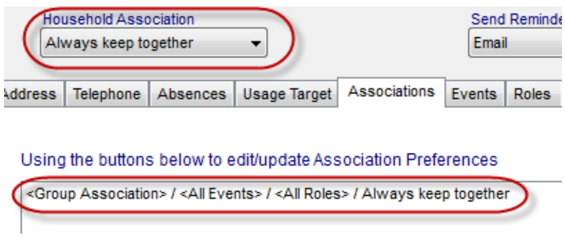
To delete an association

1. Click on an association in the Personal Associations list (the main list).
2. Click the **Delete** button to remove the association.

Notes:

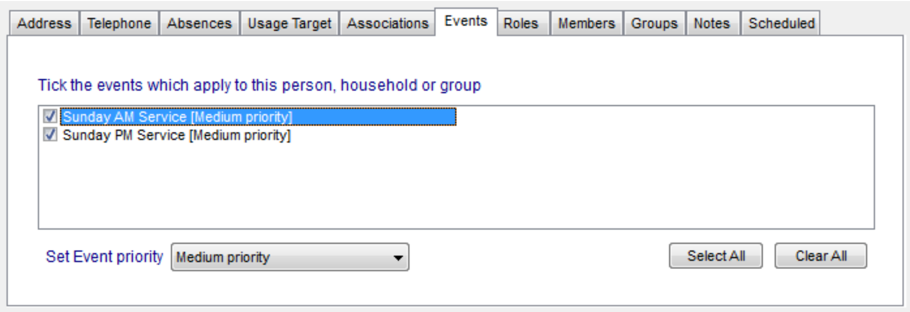
1. You can associate a person to themselves, also specifying a role/group and/or event. This effectively means that if the person is scheduled in one role, they prefer to also be scheduled in another role (as either in the role/role-group specified, or any other roles). This will NOT bypass role compatibility.

2. You can specify that a group or Household Association preference only apply within a role/role-group or event. After creating the association by selecting from the Household Association drop-down box, click on the Associations tab and you will see an association marked <Group Association>.



Click on this and then edit the association in the normal way.

Allocating Events to a Person - the Events tab



(See chapter 4, page 61, for a description of Events.)

Tick all events that apply to this person. By ticking an event, you make this person available to serve in any of their roles on any occurrence of that event.

Event Priority (EP)

Set the persons priority for an event by clicking on the event then selecting a priority in the "Set Event Priority" list box.

EP was designed to allow you to alter the likelihood a person is selected for the different events in which they serve. If they serve only on one event, then setting EP has no effect on the automatic scheduler. EP will not effect the frequency that a person is selected compared to other people. Use the usage target to change the relative usage frequency between different people.

Assigning Absences

Hint!

Always add household or group absences where you can before adding individual absences. This is a convenient shortcut that avoids having to duplicate the same absence records for each member of a household (or group)

Absences are dates or a pattern of dates when a person (or household or group) may not be scheduled.

To add absences, select the **Absences** Tab in the **Update Person Details** window, or click on the "Role Absences" button in the Role Member update dialog.

The **Absences** tab lists all current absences for that individual (or household). These can be explicit dates, date periods, or patterns of dates. Below this list are the options to Add a new absence, Edit an existing absence, or Delete an existing absence .

For most people you will normally indicate single absence dates, or date-ranges. You can also define patterns of absence. You can also define as many dates or patterns for the same person as necessary.

To add a new absence record

Select the "Absences" tab. Then click on the **Add** button.

Fill in the **Edit Absence** dialog and click OK.

To Edit an absence record

Select an absence in the Absences tab and click the **Edit** button.

Change the settings in the **Edit Absence** dialog and click OK.

To Delete an absence record

Select an absence in the Absences tab and click the **Delete** button.

Include and Exclude Absences

In the Edit Absence dialog, the top of the screen permits you to "Include" or "Exclude" an absence definition.

If "Include" is selected then the dates or pattern are included in the list of absence dates. If "Exclude" is selected, then the date or pattern is excluded from the list of "included" dates (the person will NOT be absent on that date or pattern).

For instance, if a person is absent on the 1st Sunday every month except for the 1st Sunday of the year, then create two absence records. The first will be "Include" 1st Sunday of every month, the second pattern will have "Exclude the 1st Sunday of every 12 months starting Jan-1-06".

Assigning People To Roles – the Roles tab

Once you have created a person record, you can assign that person to roles. Doing so informs SmartRoster which roles each individual can perform, so that when the Automatic Scheduler runs it knows who to assign to each role.

To add a person to a role, right-click in the **Role Members** list box on the main SmartRoster window and select "New Member". You can also add people to roles by directly dragging them from the People panel into the Role Members list box.

While editing a persons record, in the **Roles** tab in, double-click on a role to edit the way that person interacts with that role.

You can remove a person from a role by clicking once on them in the **Role Members** list box in the Roles panel and hitting the delete key. Note that you can make a role member *temporarily* unavailable to serve a specific role by un-ticking them in the **Role Members** list box.

Recording Personal Notes - the Notes tab

The Notes tab allows you to enter notes for the selected person, household or group. This allows you to record specific requests or other notes that cannot be stored in any other area of SmartRoster. This is for the benefit of the schedule administrator, and shows in the Personnel Inventory report.

Adding a Household

Adding a household is very similar to adding a person (individual).

Select the **People > New > Household** menu.

The dialog you see is very similar to that for individuals. However, Preferred name, Initials, and DOB are not present.

You can indicate applicable events for this household (which would apply to all members of this household) by adding events into the **Events** tab.

Household Association Preference

Also, instead of the **Household** field, there is a **Household Association** field. This is similar to personal association preference, but applies to each member of the household, and is the same as if each member of the household had a personal Association for each other member of the household equal to the Household Association entered here.

You can specify that a Household Association preference only apply within a role/role-group or event. After creating the association by selecting from the Household Association drop-down box, click on the Associations tab and you will see an association marked <Group Association>. Click on this and then edit the association in the normal way.

You can also enter personal associations between this household and other individuals (or households or groups) by adding them in the associations tab as you do for individuals.

Creating a Group

The Group entity is a very powerful feature of SmartRoster that allows you to treat arbitrary groups of individuals as a unit.

You can assign absences to a group, assign applicable events, and assign an association for all group members (preferring to be together or not to be together). For example, you could define **Worship Group A** as a team that is scheduled only on the Morning service, and must be together.

To create a group, select the **People > New > Group** menu. The Update Group Details dialog will display. This is very similar to that for households. You can, for instance, add a contact address for the group.

Instead of the **Household Association** field, there is a **Group Association** field, which applies to each member of the group, and is the same as if each member of the group had a *personal association preference* for each other member of the group equal to the *Group Association* entered here.

You can specify that a Group Association only apply within a role/role-group or event. After creating the association by selecting from the Group Association drop-down box, click on the Associations tab and you will see an association marked <Group Association>. Click on this and then edit the association in the normal way.

To add a group member

1. Select the **Members** tab (on the far right).
2. Click on the **Add** button. This will bring up a list of all people. Select the names to add by clicking on them. Hold down the <shift> key while selecting to select a range, or the <control> key to add specific individuals.
3. Click **OK** to add the selection to the list of members.
4. Click **Save** to confirm the changes.

Now that you have a Group, you can assign absences, applicable events, or associations to the group in the same way as you would for individuals.

When does group availability apply to members?

By default if a *group* or *household* is marked as absent, then each person in the group will be treated as absent. You can change this by un-ticking the "Group availability applies to members" checkbox in the Members tab of the Person Update dialog when editing a group or household.

Importing People Records

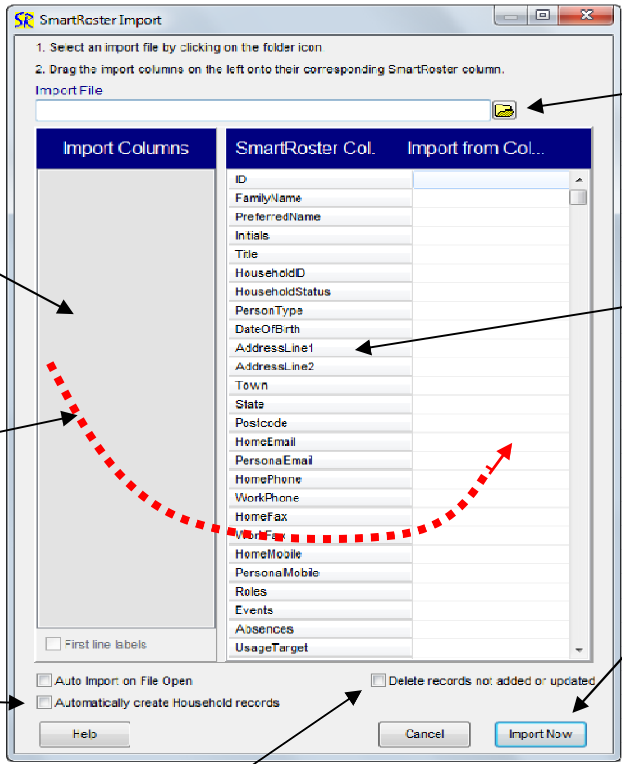
Select the **People > Import** menu. This allows you to import your people records from some other database, or to keep SmartRoster synchronized with another source of people data (say, if you maintain a database of people in some other form – possibly a Church Management System application).

Select the **People > Import** menu. The following dialog will display:

1. Select the file to import. Click on this button to search the file system

2. SmartRoster looks inside the import file to determine the fields (or columns) that are available for importing

3. You just drag a field name from the import columns and drop it on top of a SmartRoster column name to indicate where the import column data is to go. SmartRoster will already match columns in the import file that match the SmartRoster columns



These are the SmartRoster columns into which you are going to import your data

4. Automatically create household records when importing individuals based on common last names and addresses

6. Click "Import Now" to start the import, once you have matched all relevant fields

*5. Tick **Delete records not added or updated** to specify whether to delete existing records that were not added or updated after a delimited text file Import.*

SmartRoster Import Column Descriptions	
ID	Numeric ID for this person or household record
HouseholdName	Last name or surname for individual, or household name for household
PreferredName	Person's preferred first name (leave blank if a household)
Initials	Person's middle initial (leave blank if a household)
HouseholdID	The numeric ID of the household record this person belongs to. Only valid for records where PersonType=0 (see below)
PersonType	This defines the record type (numeric). 0 (zero) = Person record, 1 (one) = Household record, 2 (two) = Group record.
DateOfBirth	Person's date of birth
AddressLine1 AddressLine2	Eg the street number and name, or the post office box number
Town, State, Postcode	Town, State and Postcode (or ZIP code)
Email	Person's email address, or household email address
HomePhone HomeFax	If a Person, then the persons home phone numbers, if a Household, then this is the household's home numbers
WorkPhone WorkFax	If a Person, then the persons normal work phone numbers. Not valid for Households
PersonalMobile	Person's mobile phone number.
HomeMobile	A shared (household) mobile.

Roles	A list of roles for this person, eg "pianist|door greeter|song leader" separated by the pipe character "|". Optionally you can enter the Event that the role applies to in square brackets, eg "Pianist[AM Service]|Reader[PM Service]|…
Events	A list of events for this person (assumes the events are already set up Events are separated in the form: EventA;PriorityNum;EventB;PriorityNum where PriorityNum is 1(=v.low) to 3(=medium) to 5(=v.high)

Import File Types

There are two distinct types of file you can import.

SmartRoster file format (*.ros)

This is a normal SmartRoster (.ROS) format file. If you select one of these, the above column definitions do not apply. All you need to do is click **Import Now** to start the import process.

Importing a SmartRoster file.

1. Select a file to import by clicking on the folder icon next to the Import File text box.
2. In the Import dialog, select **SmartRoster files** in the **Files of type** box. Then select a SmartRoster file and click **Open**.
3. Click **Import Now**.

Delimited Format File (*.txt, *.cdf, …)

Sometimes called "comma-separated format" or "tab separated format" files, these are plain text files where each line of text corresponds to a record of data. Each record (line of text) is further divided into fields, where a delimiter character separates the field values from each other. A delimiter is either a Tab character or a comma. Field values may be numbers (without quote marks around them), arbitrary text strings that do not contain the delimiter character, or text strings enclosed within double-quote marks that may contain the delimiter character.

The **first line** of a DFF may optionally contain column headers, either within double quote marks or not, separated by the delimiter character. These column headers name their respective columns, corresponding to the values that will occur in subsequent lines at the same field position.

Subsequent lines contain data values, one line per person or household record. Each line is a separate record. The data values are separated by a delimiter character and correspond to their respective column name.

This is a very common industry-standard transfer file format, and many standard Church Management Software packages, as well as directory or spreadsheet programs, can export data in this format

Importing a delimited text file.

1. Select a file to import by clicking on the folder icon.

   In the **Import** dialog, select **Text (Tab/comma delimited)** in the "**Files of type**" box. Then select a file and click **Open**.

2. Once you have selected a file to import, the left hand list will display the column names of the import file. If any of these matches the SmartRoster target columns, it will automatically be placed in the matching row to the right of the SmartRoster column name. Any SmartRoster target columns that are not matched in the import file will remain empty.

3. Manually indicate which import columns will go into which SmartRoster columns by dragging the import column name from the left hand list onto the SmartRoster column name you want it to import into.

> Note: If the list of import column names on the left hand only show *Column1, Column2, Column3*, etc then this means the first line in the import file does not contain column (or field) names. You can still import from this file if you know what each column refers to, but you can make it easier by editing the import file and adding a first row which contains column names (like "FirstName"<tab>"LastName"<tab>"DOB"<tab> "Address1"<tab>…<tab>…etc) and re-trying the import. However, make sure you use the same field delimiter character as is used in the rest of the import file. For instance, if the other lines use a comma to separate fields, then use a comma in the first (header) line too. If a tab character is used in the rest of the lines then use a tab character delimiter in the header line, and so on.

4. Does your import file include Household records? If not, then tick "Automatically create household records" checkbox. This will create a new household record for each unique combination of last name and address that it finds, and automatically link individuals with the same last name and address to the household record.

5. Click the **Import Now** button to perform the import.

Note that you can import into an existing SmartRoster file (or over a previous import of the same file) safely. SmartRoster will update the records that match the names in the import file and only add new records that do not already exist in the SmartRoster file.

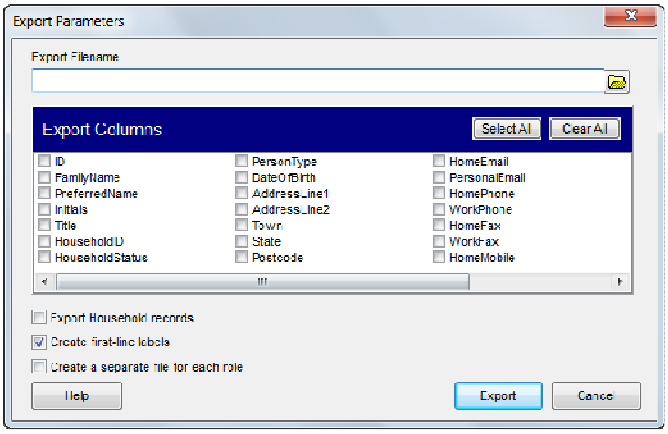
Importing Roles

If you import the Roles column, SmartRoster will create a role with each role name in the list (if they don't exist) and add the person whose role list it is as a member of each role.

Importing Events

If you import the Events column, SmartRoster will create an event with each role name in the list (if they don't exist) and add the person whose event list it is as able to serving each event.

Exporting People Records



You can export your people records in tab-delimited format for importing into some other package (into Microsoft Excel for instance).

Select the **People > Export** menu. The following dialog box will display:

Select a file by clicking on the folder icon.

Tick all fields you wish to export. Tick "Export Household records" to include these in the export.

Tick "Create first-line labels" to include the fields labels as the first row of the export file.

Tick "Create a separate file for each role" to create a separate import file for each role which includes the role members of those roles.

Auto Import

You may wish to regularly update your SmartRoster file from some external source. This may be a master SmartRoster file that someone else updates (and that may, for instance, be kept on a network drive), or it may be a routine daily/weekly extract from your organization's human resources database package (such as your Church Management Software application).

In this case, you may want SmartRoster to automatically update your people information in a SmartRoster file from this source.

To automatically import into your SmartRoster file every time you load it

1. Select the **File > Options** menu.
2. Click on the **Import** tab.
3. Tick the **Auto-Import** check box. – You will notice that the **Edit Import Spec.** button becomes activated.
4. Click on the **Edit Import Spec.** button. You will now see the **Import** window just as you did to manually do an import. Fill out this form just as you do to do an import.
5. Click OK.

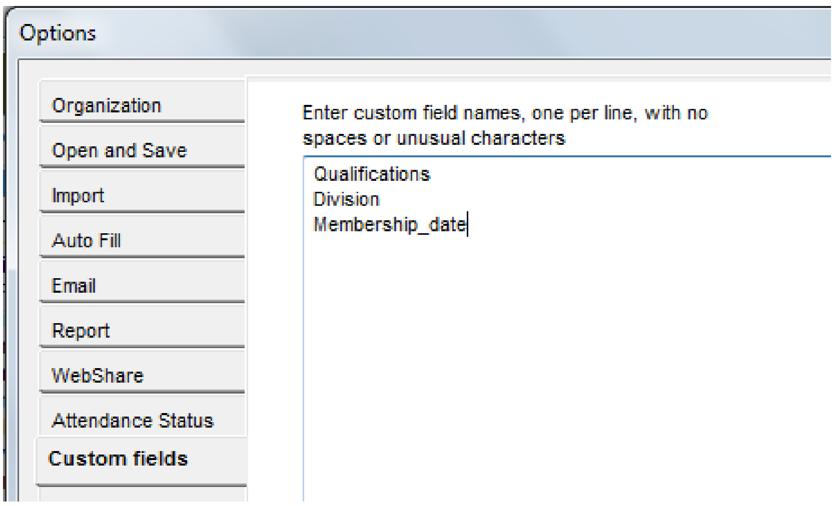
Now auto-import is active for your current SmartRoster file (Make sure you save the file now to save this change).

Custom Fields

You can now create and use your own fields for personnel. These fields allow you to store any kind of textual or numeric information that is not possible by other methods. For instance you can set up your own fields to store "important dates", "qualifications attained", "location" or anything else. You can import into these fields using the import function, report the information using the customisable Personnel Inventory report, or create a filter based on values stored in these fields.

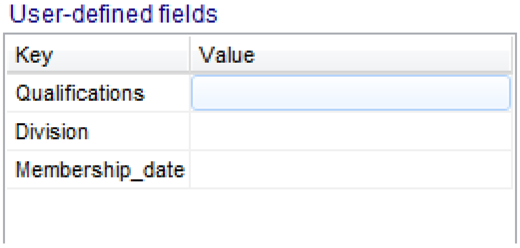
Creating Custom Fields

To define custom fields select **File** > **Options** and select the **Custom Fields** tab. You will see the following " panel. In this you just type the name of your custom fields, one field per line, as shown:



Entering data into Custom Fields

To enter values into these fields, edit a person record and select the **Notes** tab. These fields will appear on the left:



Alternatively you can import data into these fields. The new fields will appear in the Import dialog at the bottom of the list of standards SmartRoster fields. You just drag and drop the import field onto the appropriate custom field as you would do for any standard field.

Reporting custom fields

You can report these fields by selecting the Personnel Inventory report. This allows you to select any existing SmartRoster field as well as your custom fields. The Custom fields appear in the list of fields to choose with a prefix "Custom_" before them.

Filtering based on custom fields

You can create a filter based on custom fields in exactly the same way you filter on other standard fields. Just select the field name from the drop-down box (it will have the "Custom_" prefix just like when you select fields to report).

The filter can be used to limit the people you see in the people panel, to define dynamic groups, or to limit the people you are selected for a given report.

CHAPTER 4

Managing Roles and Events

What Roles do I need, and how do I set up repeating Events?

Chapter Contents

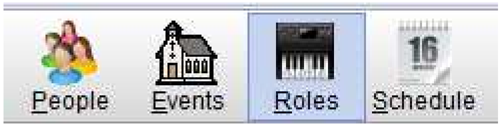
Many diverse roles within your organization are required to stage the regular events critical to your purpose. Defining roles and allocating suitable people to them, defining your events, and deciding which roles are required for each event are described in detail in this chapter.

Defining Roles

First let's recap on how we define a role.

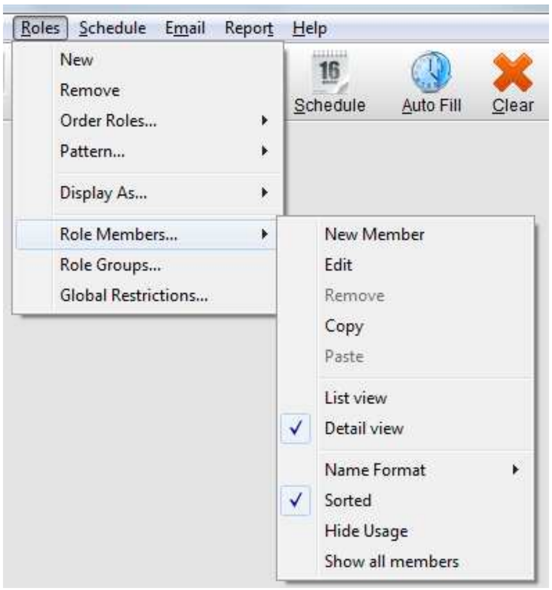
A role is a position, sometimes called a ministry or task, which needs to be filled by one or more suitably qualified persons in order to stage an event. For example, in a Church Service, "Organist", "Overhead Projectionist", or "Reader" may all be required roles. Individuals may be assigned to one or more roles. When assigned to a role, the individual (or another person) can nominate a desired frequency of usage (such as once a week, twice a month, or 7 times a year). The Automatic Scheduler uses this information to balance the schedule as fairly and appropriately as possible.

When you start a new SmartRoster file, no roles have been created. Roles are created and managed in the *Roles* panel, which is visible on the main window by clicking on "**Roles**" in the main toolbar.



The Roles Menu

You will manage Roles by selecting from functions on the **Roles** menu. This menu is activated by either clicking on the yellow arrow under the word "Roles", or by from the main menu bar.



New	Create a new Role
Remove	Delete the Role that is currently selected
Order Roles…	Change the order of the role tabs within the tab or list control. Changing the order of the Role Tabs also changes the order of Role columns in the Schedules grid.
Pattern…	Restrict the dates on which the selected Role is required, or remove such a pattern.
Display as…	Change the Roles panel to show Roles as either tabs or as a list
Role Members…	This sub menu allows you to add **new members** to this role, **edit** members, **remove** members, **Copy** the list to the clipboard, change the list view style (from List to Detail), change the **name format**, **hide** (or show) members' usage (their scheduled count), and whether or not to show only members available for selected events, or all members.

Creating A New Role

1. Select menu **Roles** > **New**

   You will see a new Roles list item tab, prompting you for the name of the new role

2. Type in the name of the new role and press the <Enter> key.

   You will notice that Roles are displayed in a list, with three tabs "General", "Members", and "Notes". To add information to a role you need to select the appropriate tab.

> ***Notes***
>
> - To change the name of a role, double-click on the name in the list tab and then type in the new name.
> - If you want to enter all role names in rapid-fire manner and fill in their details later, press the Tab key three times after entering the role name (step 2 above). It will automatically create a new tab and ask for the name of the new role. Use the <Enter> key to finish creating new Roles. Once you have created the Roles, select each in turn and update the other details.

Applies to Events

Where a role is only required for a subset of events, these need to be entered in the **Applies to Events** box (in the General tab) by dragging them from the Events list in the Events Panel.

For each event (or for All Events) you can define: the number of people required; whether to schedule in blocks of x events; any additional restrictions that may apply. See *Matching Roles to Events* below.

Role Compatibility

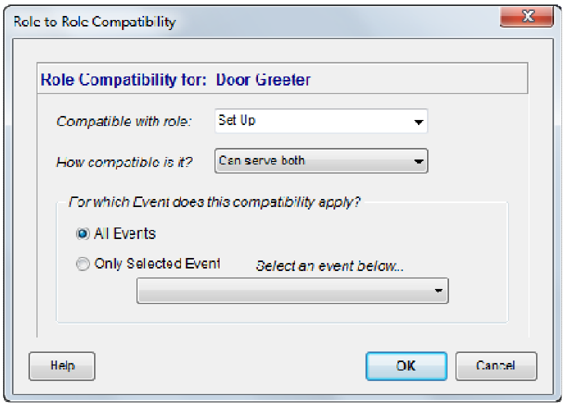
If a person is assigned to a certain role during a particular event occurrence (that is, on a specific date/time) can they also be assigned to any other role for that same event? That depends on whether the other roles are **compatible** or not with this role.

By default, roles are not compatible with each other! A person cannot be assigned to incompatible roles during the same occurrence of an event (*Occurrence* refers to a row in the Schedules grid).

To make roles compatible you need to mark them as compatible. SmartRoster allows you to specify not only whether roles are compatible, but also the *degree* to which they are compatible – from "Not incompatible" which means "A person may be scheduled into both roles, but the Auto Fill will not try to put the same person into both" to "Mandatory" which means "The same person must be scheduled into both of these roles".

You do this in the **Compatible Roles** box in the **Roles** panel, under the "General" tab.

How to make two roles compatible



1. Click **Add** button in the **Compatible Roles** panel**.** The following dialog shows:
2. Select the role to be made compatible to the current role in the dropdown box
3. Choose the strength of compatibility
4. If this only applies to a certain event, tick "only Selected Event" and select the event in the drop down box.
5. Click OK to add this role compatibility.

The higher the degree of compatibility, the harder the Auto Fill will try to put the same person in the respective compatible roles on the same event occurrence.

Note that role compatibility will only effect people who are available for (are role members of) both roles in the role compatibility record.

Adding Role Members

There are two ways to add people to a role (it doesn't matter which you choose).

Using the Role Members context menu:

1. In the Roles panel select the role tab to which you want to add members. Click on the "Members" tab for that role.
2. Right-click over the Role Members list and select "New Member" from the menu.
3. Select all the names you wish to make a role member (use <Shift> and <Ctrl> while clicking on a name keys to select multiple names)
4. Click OK

Using drag-and-drop:

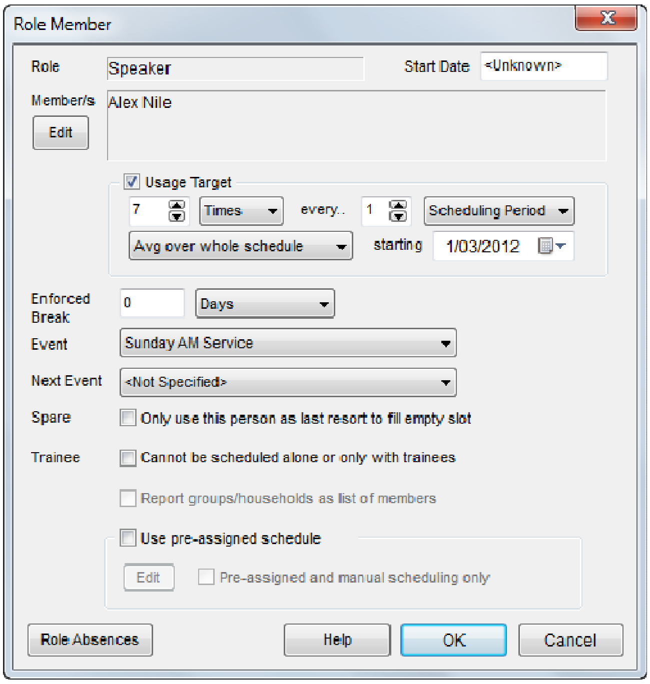
1. In the Roles panel select the role tab to which you want to add members. Click on the "Members" tab for that role.
2. Show the People panel
3. Drag names from the open people panel into the Role Members list

To remove a role member:

Right-click on their name and select remove.

Role Member Parameters

To edit role members, select all the members you wish to edit (hold down the control key to select multiple names) in the Role Members panel. Then right-click and select edit.



Usage Target

To add a usage target:

- Tick "Usage Target"
- Indicate the usage
  - number of *Times* or *Hours* or *Days*
  - the period over which this applies. If you select "Scheduling Period" this does NOT include any look-back period
- Set the usage interpretation (see below)

See also, Personal Usage Targets, page 43

Overcommitted Usage Target

At times you may see the word "Overcommitted" show in the Role Members panel title bar. This means that you have set usage targets for that role which, added together, exceed the total number of timeslots available to people in that role. However, you can still use AutoFill with overcommitted targets. Sometime this is appropriate if this is actually used as a limit and not a targe.

Usage Target Interpreta-tion

"Average over whole schedule" applies the limit as an average across the whole schedule period including any look-back (this was the default behaviour prior to SmartRoster v2.5). This is the least restrictive interpretation. In this case the actual usage will approach or equal the usage target set here

"Max for *each* ... period" applies the limit strictly to each contiguous period (each 6 week period in this example). If this is selected then you will need to provide the starting date of the first such period (the beginning of the first 6 week period, in the above example). This is a more restrictive interpretation.

"Max in *any* ... period" limits the number or times scheduled in *any* period of the given length, *regardless of when the period begins*. Starting date is therefore *not* required. In this case the actual usage averaged over the whole schedule will usually be less than the usage target set here. Hence this is the most restrictive interpretation.

Example; if you set "1 time per 2 months, Maximum for each 2 months, starting 1/1/06", then smartroster will limit this role member to on time only in each consecutive 2 month block, regardless of the total period over which the schedule is being created. If you had set "average over the whole schedule" and you were scheduling for 4 months with a two month LBP, then smartroster would insure that role-member was not scheduled more than 3 times in the 6 month planning horizon (=4 months active schedule + 2 months LBP). However this will not prevent them possibly being scheduled thrice in one calendar month and no times in the other months, even though this is unlikely.

Enforced Break

Usage can also be limited for this person in this role and (optionally) the event specified in "Event", by specifying an **Enforced Break**. This instructs AutoFill to guarantee a break of the specified hours between successive timeslots for the same individual for this role.

See also, Person Enforced Break , page 44, or Global Enforced Break, page 123.

Event / Next Event

Select an Event if this usage only applies to a specific event. By setting Event you can limit this person only to the Event specified. If they only ever serve on a given event regardless of role, then you should set this under the persons details via the People panel.

You can add the same person multiple times into the role members list, with a different usage for different events. This gives you fine control over which events a person can fill in each of their roles, and the usage target for each such role/event combination

"Next Event" allows you to indicate that, whenever this role member is scheduled automatically in the "Event" given in the event field, then they should automatically be scheduled into the next available timeslot for the event specified in "Next Event". eg, if Event is "Sunday AM" and "Next Event" is "Sunday PM" for "Joe" in role "Setup", then IF SmartRoster schedules the person to "Sunday AM" role "Setup", then Smartroster will automatically schedule them to the very next "Setup" timeslot for the "Sunday PM" event.

Start Date

Indicate when the role member started in this role. If they start after the beginning of the current schedule period then SmartRoster will not schedule them before this time.

Spare

Tick the "Spare" checkbox to designate a person as spare. Autofill will only try to schedule the person in this role if no one else is able to fill a slot. You can still use Usage Targets to set a the maximum that this person can be used, even if no one else is available.

Trainee

Tick the "Trainee" checkbox to designate a person as Trainee. Autofill will only allocate a Trainee after already allocating a non-trainee. ie. a Trainee cannot be scheduled in a timeslot on their own or only with other trainees.

Report groups/households as list of members

When scheduling with groups or households this option allows you to report them in schedule reports by replacing the name with the list of members of the group/household

Role Absence

Enter absences for the person in **this role** (and **event** if specified). This allows you to specify when a person is absent for the purposes of this specific role, in addition to any other absences for the person or their household. See page 47 for a description.

Pre-assignments

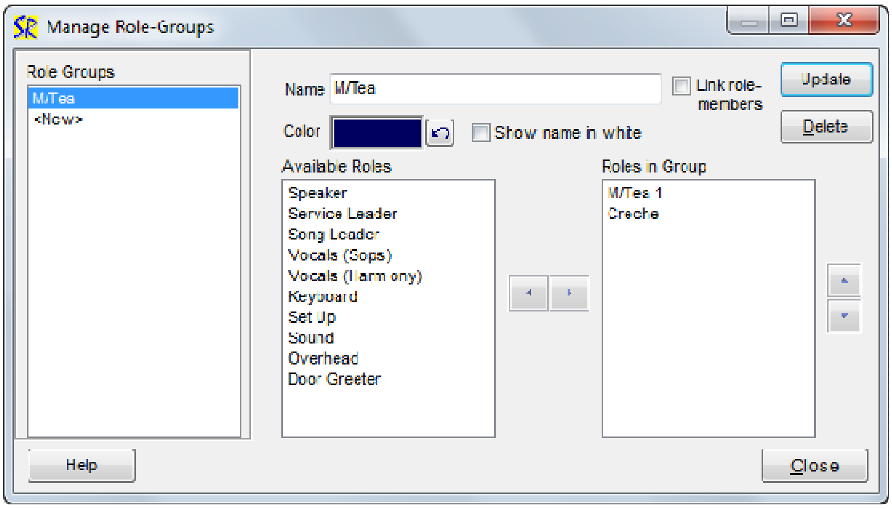
You may pre-assign a person to the schedule by ticking "Use preassigned schedule". Click "Edit" to define the fixed pattern for scheduling this person. The pattern may be any pattern that can be defined for an event. Once pre-assigned, you will see this person shown in green in the relevant timeslots in the schedules grid. Tick "Preassigned and manual scheduling only" to tell SmartRoster to NOT assign any other timeslots to this person in this role. To remove the preassignment untick the "Use preassigned schedule" box.

Role Groups

Role groups are used for restricting usage targets for individuals, households, or groups to only a subset of roles.

To edit role groups select **Role groups** from the **Roles** menu.

The following dialog will be displayed:



In the left hand side will show a list of any role groups you have previously defined.

You will see under "Available roles" a list of your roles.

Click on <New> in the list to create a new role. Name the role group in the "Name" field. Then select all the roles in this group from the "Available roles" list (you can use the <Shift> or <Ctrl> keys to extend your selection) and click th e double right arrow button to add them to the "Roles in group" list. Once you've finished click the **Add** button to add this new role group to your list.

To edit an existing role group click on the role group in the left hand list, make any changes you require, and click on the **Update** button (the **Add** button will change to **Update** when you click on an existing role group).

Linked Role-members

Tick the check box "Linked Role-members" to have all the roles in the selected role-group linked. When roles are linked, any changes made to role members of one role will automatically be replicated to all other roles in the role group.

Colour

You can optionally change the colour for this role group. All roles in the main schedule panel will have their heading in this colour. The text will be in white if "Show name in white" is ticked.

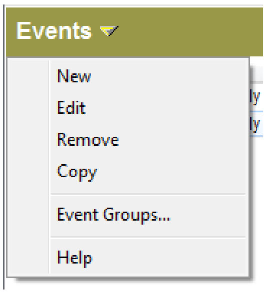
Defining Events

Now let's recap on how we define an event.

SmartRoster uses the term event to mean a **series of meetings** (for a Church, this could be Mass or a Worship Service) with the **same role requirements**, occurring on arbitrary dates, according to a regular pattern of dates, or both. For example, Sunday 10AM Service may be an event that occurs every Sunday and needs a Speaker, Leader, 2xSingers, Organist and 2xUshers. Sunday AM Service on 3rd March 2002 10:00am is one instance or *occurrence* of the event Sunday AM Service. You may have also defined this as NOT occurring on a specific date.

When you start a new SmartRoster file, no events have been defined. Events are defined and managed in the Events panel, which is visible on the main window by clicking on **Events** in the main toolbar.

The Events Menu



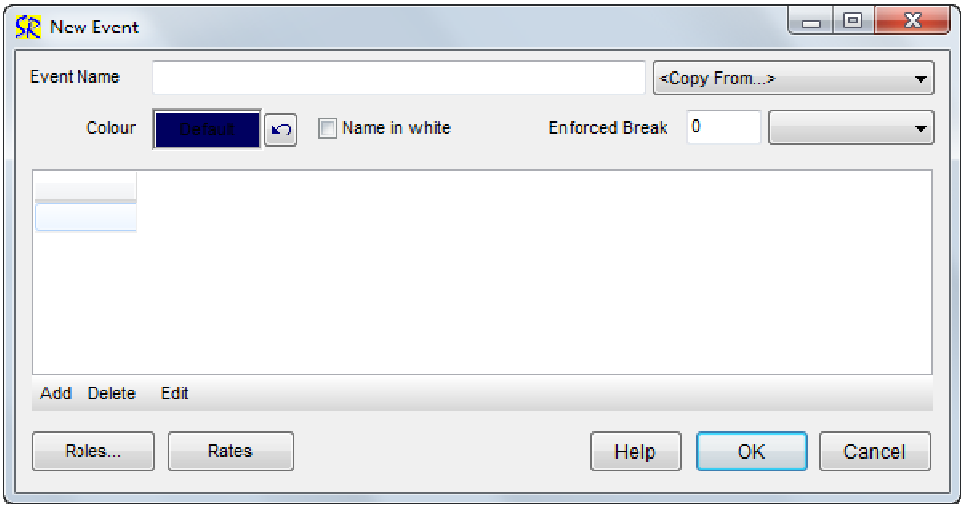
You will use the **Events** menu to create, delete, and edit events.

New	Create a new **Event**
Edit	Edit the **Event** that is currently selected. (You can also double-click on an event to edit it.)
Remove	Delete the **Event** that is currently selected

Creating a New Event

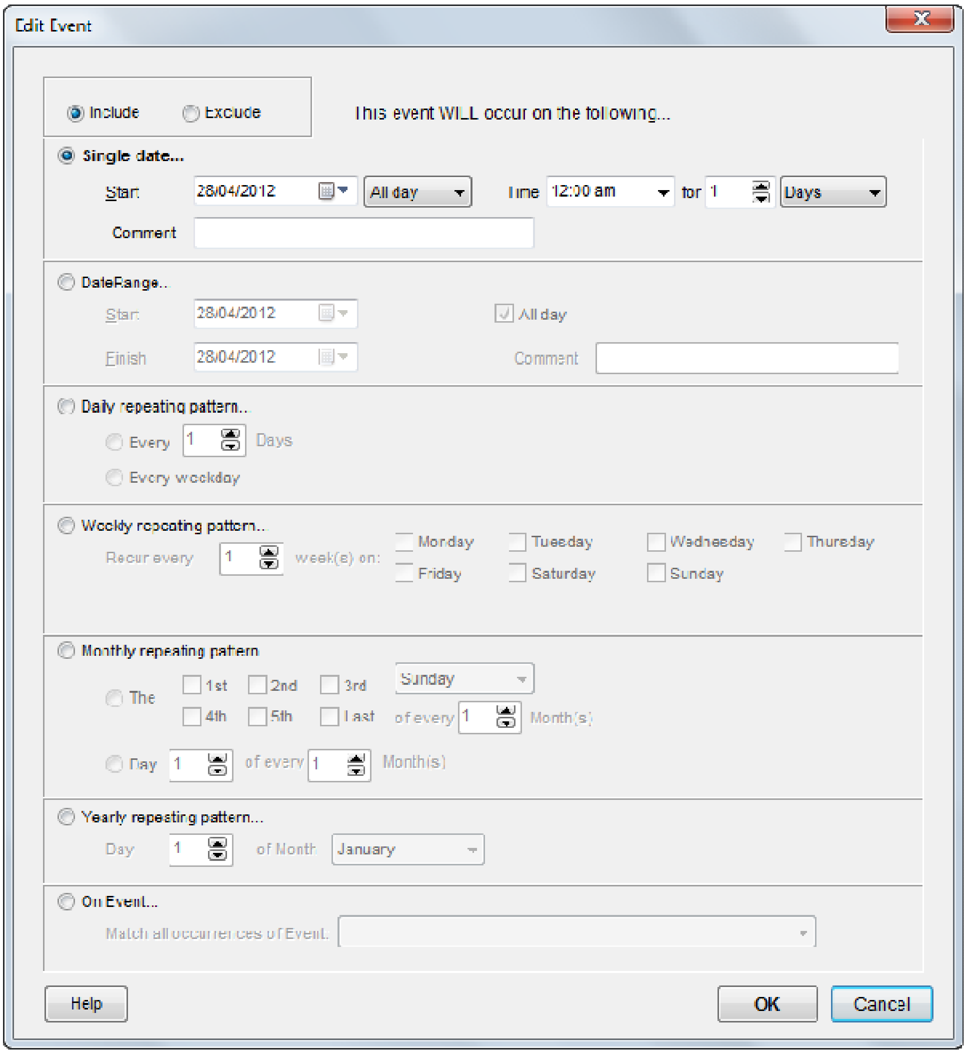
1. Select **Events > New** menu

   The **New Event** window displays:



2. Fill in the name of this event in the **Event Name** box. Keep this as succinct as possible, because it appears in the Schedules grid.
3. You can select a colour for this event which shows in the main schedules panel. The text will be in white if "Show name in white" is ticked.
4. Enter an optional Event Enforced Break if needed. SmartRoster will then NOT schedule a person within the enforced break hours/days after being scheduled to this event.
5. Now define dates/time pattern/s or arbitrary dates which make up this event. You can add as many patterns or arbitrary dates as you wish.

To add a pattern click the Add button. You will see the following dialog:



Adding a Date Pattern or arbitrary date/time

Select the type of pattern: Single date, Date range, Daily repeating, Weekly repeating, etc.

The select the various fields that are in the Yellow highlighted box appropriate to the event type you have selected.

Eg. to define a weekly service that occurs every Sunday at 10:00am for 1 hour, first select "Weekly repeating pattern", make it recur once every week, and tick only the Sunday check box, and enter the time 10:00am and select 1 hour

In most cases you need to define the start time and duration of the event by setting the Time…For…boxes:

To finish adding a pattern, click the Add button. The pattern will appear in the list of patterns for THAT event.

To exclude specific dates or a date-pattern

Each adhoc date or date-pattern can be either “Included” or “Excluded” from the overall event dates. If “Include” is selected when you click Add, then the date/times defined by this pattern will be added to the total date/times of this event. If "Exclude" is selected, then the date/times defined by this pattern will be removed from the total date/times of this event

Copy all event settings from another event

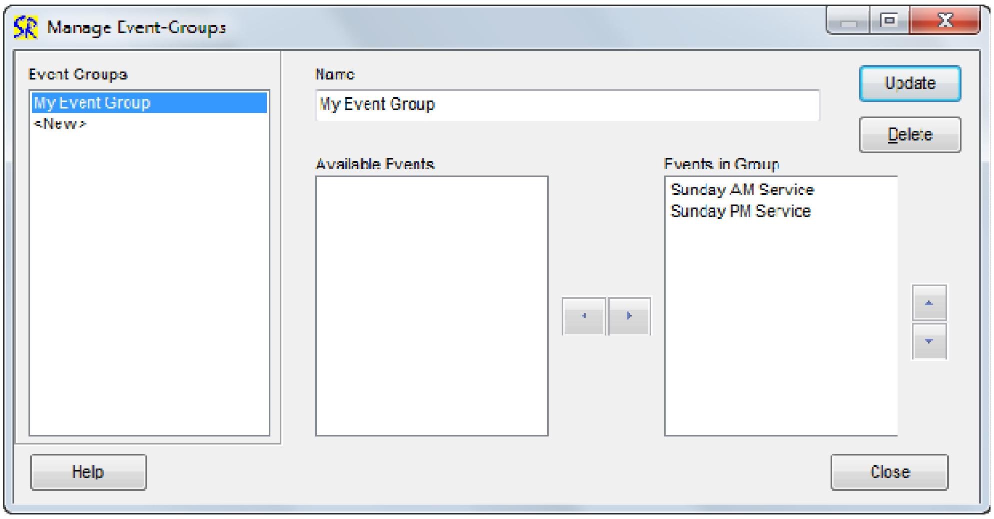
Just select from the <Copy From> drop down box and select another event (if you have already defined another event). All the values will be copied into this event which you can then modify as necessary.

Event Groups

Event groups are used for restricting usage targets for individuals, households, or groups to only a subset of events.

To edit event groups select **Event groups** from the **Events** menu.

The following dialog will be displayed:



In the left hand side will show a list of any event groups you have previously defined.

You will see under "Available Events" a list of your roles.

Click on <New> in the list to create a new role. Name the event group in the "Name" field. Then select all the events in this group from the "Available Events" list (you can use the <Shift> or <Ctrl> keys to extend your selection) and click th e double right arrow button to add them to the "Events in group" list. Once you've finished click the **Add** button to add this new event group to your list.

To edit an existing event group click on the event group in the left hand list, make any changes you require, and click on the **Update** button (the **Add** button will change to **Update** when you click on an existing event group).

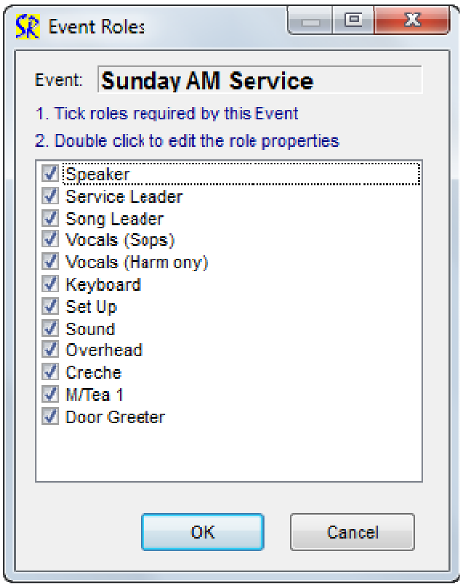
Matching Roles to Events

To recap: An event is defined as a repeating sequence of meetings (for any purpose) that have the *same role requirements*.

Therefore for each event you have defined, you need to indicate which Roles are required.

There are **two ways** to do this. It doesn't matter which way you choose.

Specify all ROLES required for a specific EVENT



1. Double-click on an event in the *Events* panel to edit it.
2. Click on the **Roles** button.
3. Tick the box next to all roles required by this event.
4. Double click on each selected role to edit the role-event properties (see Adjusting Role-Event properties below)

5 Click OK.

Specify all EVENTS that require a specific ROLE:

1. Open both the Events and Roles panels (using the Toolbar buttons)
2. Select a Role for which you want to define valid Events, and the **General** tab.

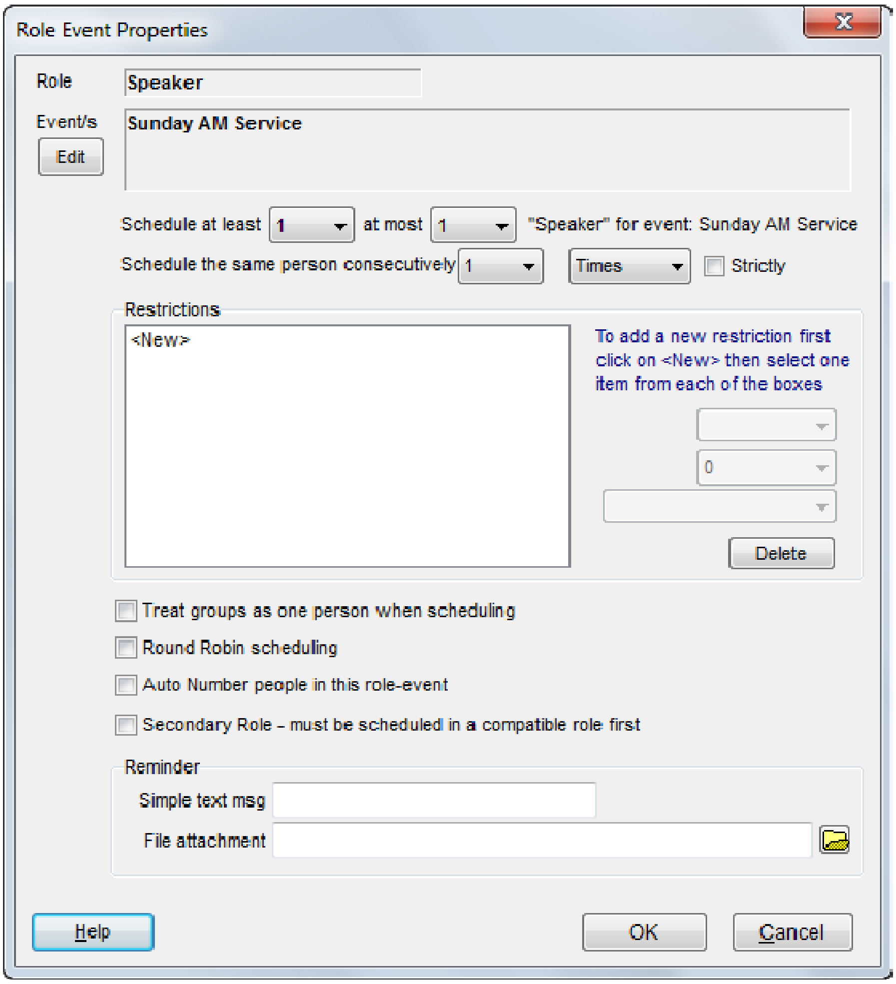
Applies to Events... dbug

Event	Min	Consecutive	R/Robin	Treat group as 1	AutoNumber	Secondary	Restrictions
Sunday AM Service	1	1 times					
Sunday PM Service	1	1 times					

In the **Applies to Events...** box you will see all the events that this role applies to

3. Click on an event, and while holding down the mouse button, drag it into the **Applies to Events** box.
4. Drag as many events as apply to this role into the **Applies to Events** box.
5. Now you can adjust the Role-Event settings (see next page).

Adjusting Role-Event properties



To adjust the Role-Event settings, double-click on any Event in the **Applies to Events…** box. You can adjust multiple role-events by <shift> or <ctrl> clicking on multiple events in the **Applies to Events…** box and then right-click and "edit".

The **Role Event Properties** dialog will show:

"Schedule at least"; "Schedule at most"

"Schedule at least" is the normal target SmartRoster will use when Auto Scheduling. "Schedule at most" is used to schedule people with positive association preferences to people already scheduled, and gives SmartRoster some flexibility in meeting these associations. Usually you will set both limits to the same number.

"Schedule the same person consecutively"

This setting allows for block scheduling of the same person. For instance, specifying that a person be scheduled "Consecutively X Times" for a role in event EV tells SmartRoster to always put them person in X consecutive slots for the same event (eg the next 3 "Sunday AM service"s in a row), regardless of the length of time spanned by those events. If you specify "Consecutively X Days" for a role in event EV, then the person is scheduled for as many EV events as occur in the specified days, regardless of how many times that is.

Setting "1 times" is the default and simply means to schedule the person once. Setting "1 month" will cause the person to be schedule for all occurrences of the specified event that occur in the next 1 month.

"Treat groups as one person when scheduling"

If you want groups which are also Role Members to be treated as if they were a single person then tick this box

"Round Robin scheduling"

If this is ticked, SmartRoster will schedule this role-event by selecting each role-member in turn from the role-members list. SmartRoster will ignore any association preferences while scheduling this role-event. It will consider absences though, and will ignore any person who is not available when their turn comes up.

The order of role-members can be set in the role-members panel. To set the order, first you must turn off the default role-member sorting. Right-click in the role-members panel and untick the "Sorted" menu.

Now you can order the role members simply by dragging the names up and down the list.

"Auto number people in this role-event"

If this option is selected then SmartRoster will automatically number each person in each scheduled-timeslot.

"Secondary Role"

If this option is selected then SmartRoster will require a person to be scheduled in another role that is compatible to this one during the same event, before it will schedule that person in this role. In other words, only schedule in this role/event a person already scheduled in the same event on another role.

Reminder messages

Simple text msg

This text message will appear in reminder emails to this person.

File Attachment

If this is used, then the file will be attached to any reminder message sent to the person scheduled in this role/event combination.

Restrictions based on group membership

Role-Event Restrictions are a powerful feature that allows you to restrict the persons selected in a timeslot depending on their group-membership.

To create any restriction you first need to define a group on which to base the restriction.

Role-Event Restrictions

Role-Event Restrictions apply to a single role-event pair and are defined after selecting a role-event in the "Applies to events" panel.

Example: **To Role-Event restrict the number required to "at most 1 male"**:

1. Create a group called "Male" (in the main SmartRoster window, People panel)
2. Add into that group all the males

3. Double click on the Role-Event for which you want to restrict the number of "Male"s scheduled
4. Click on <New Restriction>
5. In the first drop down box next to <New Restriction> select "At most"
6. In the second drop down box select "1"
7. In the third drop down box select "Male"
8. Click OK.

To delete a restriction, select the restriction in the list and click on Delete.

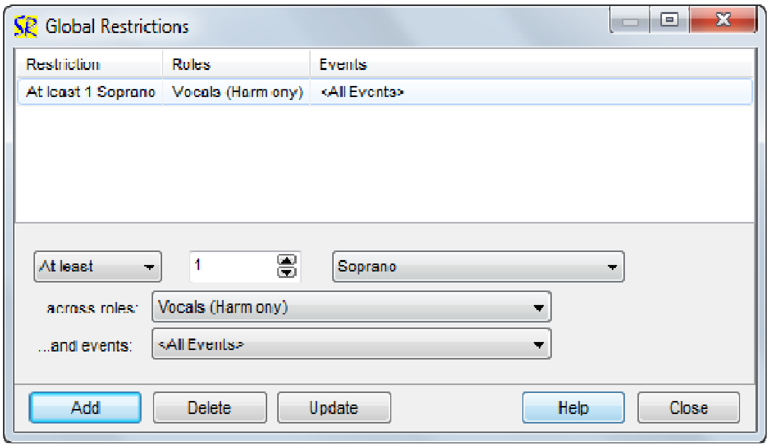
Global Restrictions

A Global Restriction applies over a groups of roles or all roles, and to all events or only a group of events.

To create any global restriction you may first need to define a role-group on which to base the restriction (as well as a person group).

Example: **To require at least one Soprano voice to be scheduled across all vocal roles in any service**:

1. Create a group called "Soprano" and add into that group all the sopranos
2. Create a Role-group called "Singer roles" and add all the *vocal* type roles
3. Select menu Roles > Restrictions. You will see the following dialog:



4. In the first drop down box select "At least"
5. In the second drop down box select "1"
6. In the third drop down box select "Soprano"
7. In "...across roles" select "Singer roles" role group
8. Leave "Applies to events" set to <All Events>
9. Click Add and then Close.

Now when AutoFill runs, SmartRoster will make sure that at least one person who belongs to the people-group "Soprano" is selected in one of the roles belonging to the "Singer roles" group of roles.

CHAPTER 5

Creating And Using Schedules

How do I set up and manage my schedules?

Chapter Contents

Once you have set up your SmartRoster file, your people (individuals, households, groups), roles, and events, you can begin the actual process of scheduling. SmartRoster makes scheduling easy, but even more importantly; it can automatically do most of the scheduling work for you. The Automatic Scheduler is SmartRoster's most powerful feature, the one that really sets it apart from the competition. You won't believe how easy scheduling can be with SmartRoster!

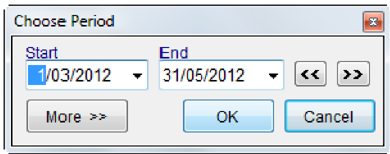
Setting Scheduling Period and Look-back days

You will construct your schedules in the Schedules panel. See page 17 for a summary of the features of this panel.

The first step in creating schedules is to set the time period to be covered by the schedules.

1. Open the *Schedules* panel if it is not currently visible.

2. Click on the down arrow next to **Scheduling Period** box. Then choose the dates in the **Choose Period** dialog by settings the Start and End dates and click OK.

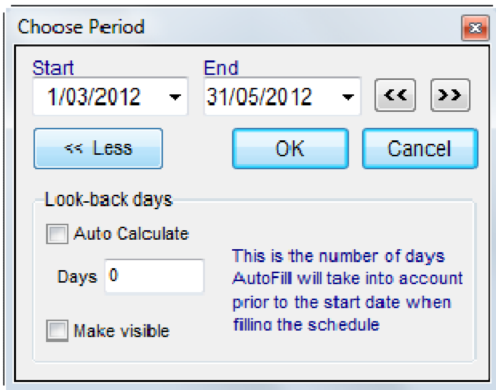


A row will appear in the Schedules grid for each event that occurs during the scheduling period. Also, a column will appear in the Schedules grid for each role you have defined (but only if the **Include on Schedule** check box is ticked in the Roles panel). **If no dates appear it may be that you have not defined any events**. In this case go back and define your events first (see page 61).

Setting the "Look-back" days

Look-back days are the days that the automatic scheduler will consider before the start date of the scheduling period. The automatic scheduler will take into account who is filling roles prior to the current range when determining who to select for roles in the current range. The look-back days should be large enough so that everyone in every active role could be expected to be scheduled at least once in the period that includes the current scheduling period *and* the look-back days.

To set look-back days you click the More button in the Choose Period dialog.



You will see the following >>

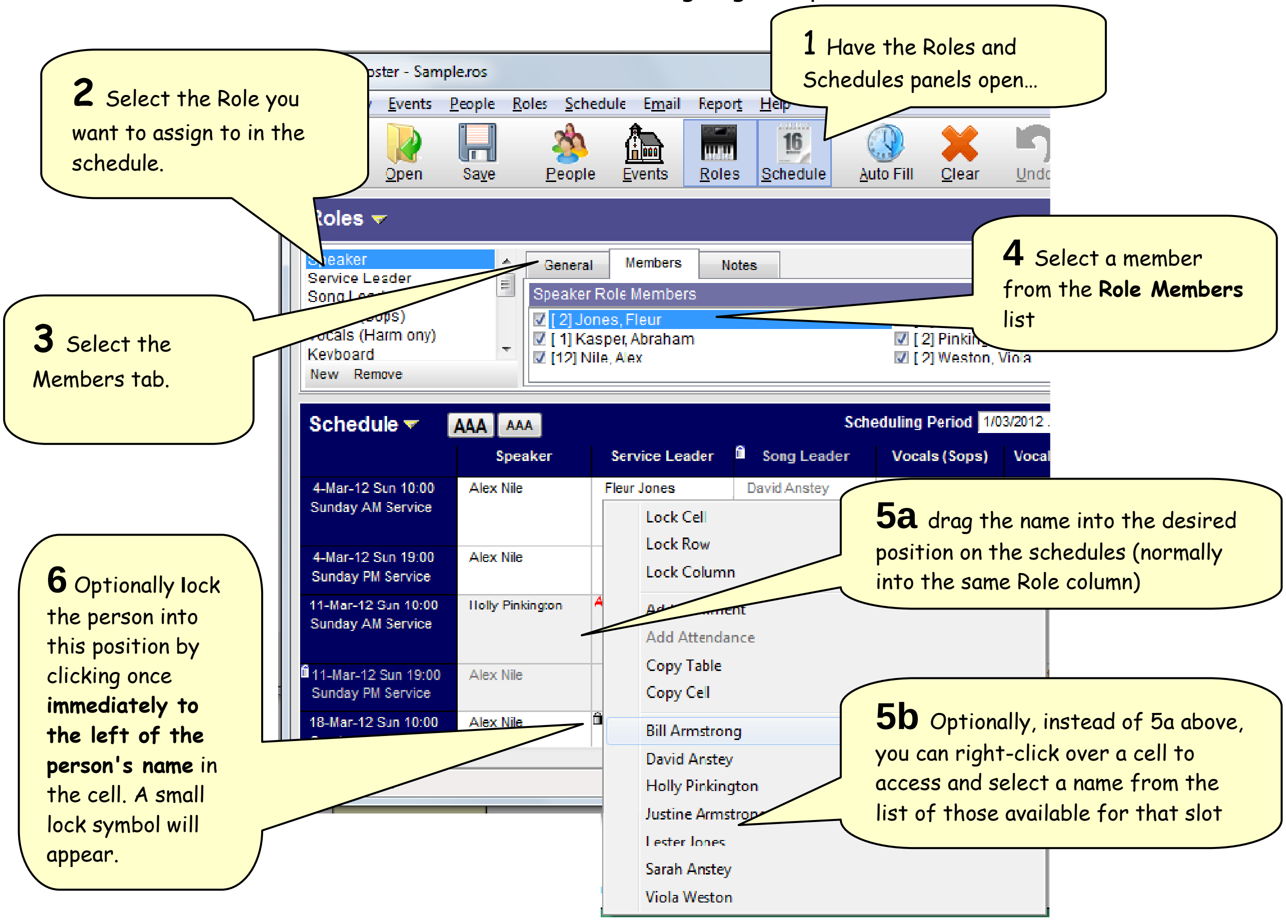
Enter the number of days in the Days edit box. You can decide whether or not to make these visible in the Schedules panel by ticking the Make Visible check box.

Even if they are visible, the automatic scheduler will not allocate these days. It only refers to these previous allocations when allocating roles in the current period.

If you tick "Auto Calculate" then SmartRoster will work out an appropriate value for you.

Manual Scheduling

You can manually schedule people by drag-and-dropping them from the **Role Members** list or from the **People** panel. Do this before running the Automatic Scheduler when you want to fix a person to a schedule position, thus preventing the Automatic Scheduler from assigning that position.



You can allocate in this way as many positions as you wish.

> **Warning!**
>
> When you allocate positions manually, non-mandatory personal associations, such as "likes to be with…", will be ignored

You can also drop names directly from the People panel into positions on the schedules, even if they are not members of the respective role. This allows for one-off exceptions, but it is up to the person doing the schedule to make sure such allocations are appropriate.

Enforce associations with manual scheduling

If you tick the option with the above name (in the "File > Options" menu and the "Other" tab), then when you drop a person into a scheduled timeslot, SmartRoster checks to see if there are any other people who have a "Always keep together" or "strongly prefer together" preference with that person, and automatically adds them into appropriate timeslots for the same event.

Moving items in the schedules using the mouse

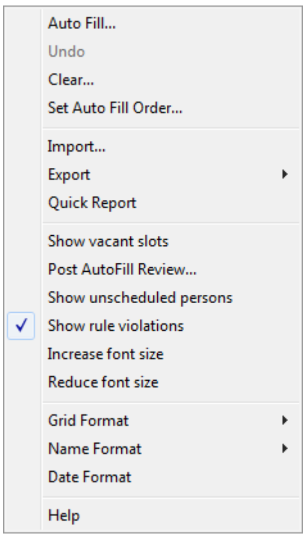
You can simply move individuals up and down in the same schedule or even to a completely different schedule by clicking on them and, while holding the left mouse button down, dragging them to the other cell. This is called "drag and drop".

As you drag the mouse the mouse pointer will adopt one of two forms:

	Drop-Valid. The person may be dropped in the current cell (by releasing the left mouse button)
	Drop-Invalid. The person cannot be dropped into the current cell.

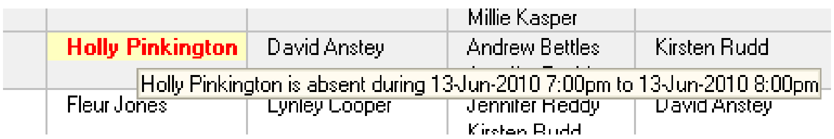
Drop-Invalid will show if the person is absent on the day/event over which you are moving or if the person is not a member of that Role.

- To remove a person from a position, click once to select the person (the person's name will appear as **bold** text). Then hit the **<Delete>** key on the keyboard.
- To move a person from one cell to another simply drag-and-drop them. The person will be removed from the source cell and added to the person or persons already in the destination cell. (Note: you can add as many people as you like to one cell).
- To copy a person from an existing cell, hold down the **<Ctrl>** key while performing the drag-and-drop. The person will appear in both the source and destination cells.
- To swap two people, hold down the **<Shift>** key while performing the drag-and-drop. The person will appear in the destination cell, and person or persons that were there will now appear in the source cell.
- To move a person and replace the existing contents of the destination cell, hold down the **<Shift>** and **<Ctrl>** keys while performing the drag-and-drop. The person will appear in the destination cell and any existing occupants of the destination cell will be removed.
- To move a person into a cell in which they normally would be invalid, hold down the **<Alt>** key while performing the drag-and-drop.
- It is possible to move people between roles in the Schedules grid using the methods outlined above.
- As you move a person to another role using the drag-and-drop method, the mouse pointer will only show the Drop-Valid icon if the person is a member of the role over which you are currently moving.



Showing rule violations

Where you have manually allocated people to the schedule, or added constraints (such as absences) after scheduling a person, it is possible to create rule violations. You can see these violation by selecting option **Schedule > Show Rule Violations.** Any violations will appear as names in red and if you click on them the reason will also be given.



*Smart*Explain

A question often raised is "why won't SmartRoster schedule so-and-so to a particular role or timeslot?". Now you can find out why. Just try dragging the persons name into a timeslot. SmartRoster will show the reason why a person cannot be allocated in a small text box next to the mouse cursor.

Using the "Dates by Names" grid format

To select this format, choose menu **Schedules** > **Grid format** and select **Dates by Names** from the menu. Choose menu **Roles by Dates** to go back to the default format.

	Mar-04 10:00 Sun	Mar-04 19:00 Sun	Mar-11 10:00 Sun	Mar-11 19:00 Sun	Mar-18 10:00 Sun	Mar-18 19:00 Sun	Mar-25 10:00 Sun	Mar-25 19:00 Sun
Kristen Mansell		M/Tea 1	M/Tea 1					
Rebecca Mansell								
Alex Nile	Speaker	Speaker		Speaker	Speaker	Speaker	Sound	Speaker
Tricia Nile								
Holly Pinkington			Speaker		Service Leader	Service Leader	Door Greeter	Door Greeter
Leo Pinkington						M/Tea 1 Door Greeter		
Claire Reddy	Sound			Keyboard		Sound	Keyboard	
Jennifer Reddy	Creche	Vocals (Sops)	Vocals (Sops)		Vocals (Sops)	Vocals (Sops)		Vocals (Sops)
Michael Reddy								M/Tea 1
Warwick Reddy		Overhead					Overhead	
Kirsten Rudd	Vocals (Sops)	Vocals (Sops)	Vocals (Harm ony)	Vocals (Sops)	Vocals (Sops)	Vocals (Harm ony)	Vocals (Sops)	Vocals (Sops)
Kristoff Rudd			Keyboard					Keyboard
Florence Smart	Vocals (Harm ony)	Keyboard	Sound	Creche	Keyboard			Vocals (Harm ony
Viola Weston			Service Leader	Service Leader			Creche	
Beth White								
Phillip White								

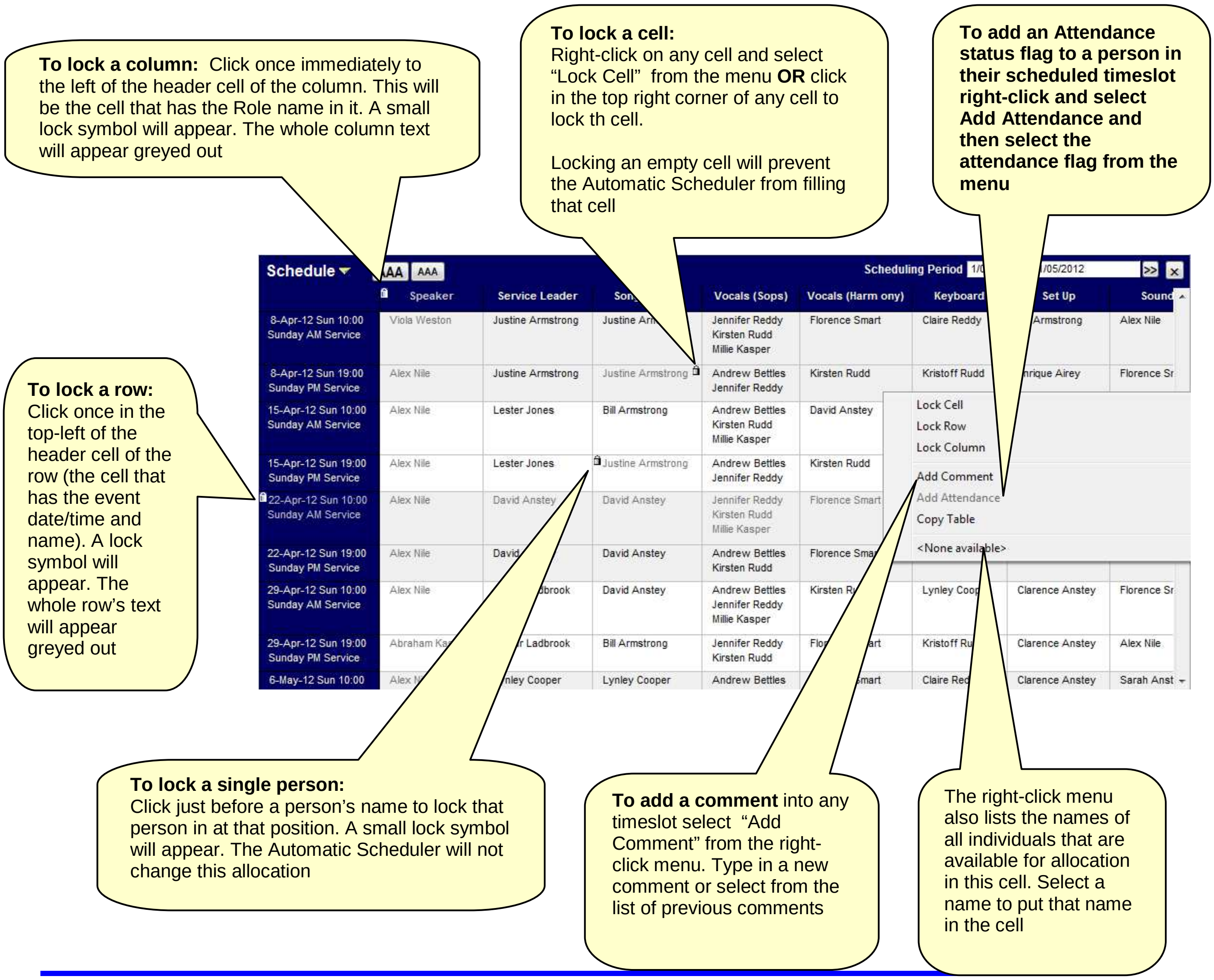
This alternate grid format has individuals as rows and the event dates as columns. It shows **roles** (using role abbreviation if supplied) as values in the grid cells. This format is especially useful where a majority of individuals are scheduled many times within the schedule period. It it not as useful where you have a large number of people who are scheduled infrequently.

While using this format note the following:

1. You cannot enter cell comments
2. You cannot schedule people by drag-and-drop
3. You can select from a persons eligible roles by the right-click menu
4. Locking a row (person) is equivalent to de-activating a person
5. Locking a column (event occurrence) is equivalent to locking a row in the default "Roles by dates" grid format
6. The Date format specified may be different to the date format used in the default grid format (SmartRoster remembers both settings)
7. The following comments regarding locked entries only apply to the default "Roles by dates" grid format.

Locked Timeslot Entries

You may manually allocate some or all events for a role (such as the Speaker role for a Church Service, which would rarely be automatically allocated) and you may even allocate all roles for some events (like a special memorial service or holiday). SmartRoster allows you to lock in a whole column (role), row (event instance), or cell at a time, or person in a cell. When you lock a person, row or column, a small lock symbol will appear and the cell, row or column text will change to grey text. You will need to unlock it if you wish to make changes to it. **The Auto Scheduler will not re-allocate cells that are locked.**



Schedule Comments

To add a comment into any timeslot, right-click over the timeslot. The select "Add Comment" from the right-click menu. Type in a new comment or select from the list of previous comments from the drop down box (see diagram above). Alternatively simply double click into any blank area in a cell.

You cannot enter comments while editing in the "Dates by Names" grid format.

“Schedules panel” Date and Name format

You can specify the format of the **names** or **dates** that appear on either axis by choosing the **Schedules > Name format** or **Schedules > Date format** menu respectively.

By selecting Date format you can specify how SmartRoster displays the Event/Date/Time label. This string can contain:

<EVENT>	A literal token that is replaced by the event name
<COMMENT>	A literal token that is replaced by the event comment, if it exists for this event occurrence
|	A single "pipe" character which indicate a new line at this place in the event specifier
Format string	Strings of characters that substitute for date and time values. See: Date-time format strings on page 120.

Automatic Schedule Generation

The previous sections discussed how to assign people one at a time, and how to make changes as you go along. The best way to assign people to schedules is to use the powerful SmartRoster Automatic Scheduler. This feature really is what makes SmartRoster stand out from other scheduling methods.

Pre-Auto Fill Check List

Before you use the Automatic Scheduler check that you have all necessary information:

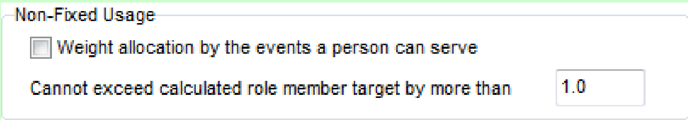
- ❑ Have you added all absences? *See page 47*
- ❑ Have you added association preferences? *See page 46*
- ❑ Have you added Household association preferences? *See page 48*
- ❑ Have you set usage targets for Role Members, where this is known? *See page 59*
- ❑ Have you added fixed schedule entries and locked these in? *See page 71*

Scheduler Quality Measures

The quality of a generated schedule depends on a number of factors, including how many associations it satisfies, how close it comes to meeting usage targets (how evenly it distributes roles to role members), how many vacancies are filled, and (sometimes) overall how many people are able to be scheduled.

SmartRoster uses a number of quality measures, which are shown for the current schedule in the status bar on the bottom of the SmartRoster window.

Which quality measure is important depends on your specific circumstances.

Vacant Slots	"Vacant slots" are the difference between the number of people required in a role/event and the number scheduled in a given timeslot. **Bottom line: Try increasing the "Cannot exceed…" property if there are too many vacant slots**  [AutoFill | Options] Increasing "Cannot exceed.." number will reduce Vacant Slots at the expense of increased average usage error.
Average Usage Error	This is the average error between each person's usage target and the actual usage percent attained. For example, suppose all role members have a usage target of 25%. For each individual the actual usage percent is calculated and the difference between that and 25% is the Usage Error. The average of all usage errors for all individuals is the Avg Usage Error. **Bottom line: The smaller the error, the better the schedule.**
Association Satisfaction Score	This number represents the degree to which association preferences have been satisfied by the schedule. It is not simply a count, but is weighted by the strength of an association that has been satisfied. **Bottom line: A larger number represents a better the schedule.**
Participants	This number shows how many people are scheduled at least once in the current schedule period. If a person is not scheduled but their family, or a group to which they belong, is scheduled, then they are still counted as participating in the schedule.
Variability	This number represents the cooefficient of variabiltiy. Low variability occurs when the spacing between scheduled timeslots for a person is always the same. High variability occurs when the spacing between scheduled timeslots for a person is very variable (sometimes short sometimes long). In general most schedulers aim for low variability – which also corresponds to a more even predictable schedule. **Bottom line: The smaller the variability, the better the schedule.**

How the Automatic Scheduler (AutoFill) works

When you use the Automatic Scheduler, you choose which quality measures to try to improve, and in which order.

Each time AutoFill generates a schedule it compares the quality measures with that of the previous best schedule, in the order (top to bottom) shown in the optimisation box (below).

If a schedule improves on any measure then it becomes the current best and the optimisation measures lower down the order are not evaluated for that schedule (even though they may have become worse).

If a schedule gets worse on any measure then it is discarded and a new schedule is generated. The previous best schedule remains the current best schedule.

If a schedule is the same (not improved but not worse) on any measure then AutoFill continues comparing measures by checking the next selected measure to optimise from the optimisation box.

In this way it will keep generating schedules, only keeping those that are an improvement over any previous. It will keep doing this until it reaches a limit (Terminate When.. condition) specified by you when you initiate AutoFill.

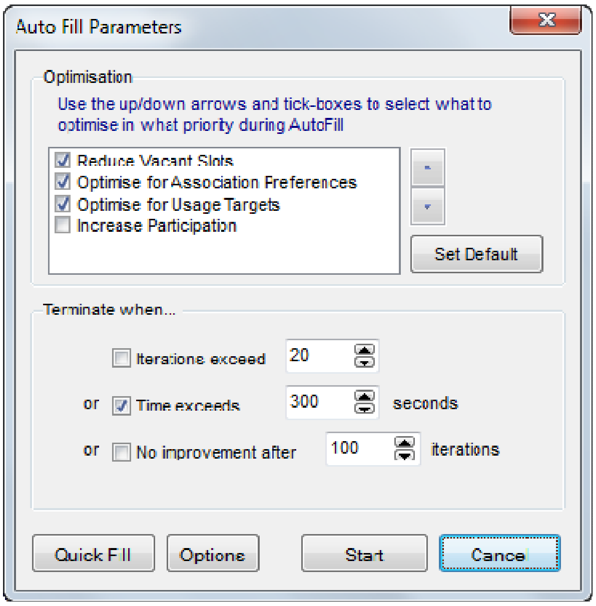
Initiating Auto Fill

To automatically assign people to all of your roles, select **Auto Fill** from the **Schedules** menu. SmartRoster opens the **Auto Fill Options** dialog box, which presents options for setting the **Auto Fill** priorities and end point (when to stop). The Automatic Scheduler then automatically tries to fill all timeslots, except slots, roles, and/or events that are locked. If necessary, you can then make any minor adjustments and changes you want, and hand out your schedules. It is that easy!

Auto Fill is started by selecting **Auto Fill** from the toolbar or the **Schedules > Auto-fill** Menu.

The Auto Fill Parameters dialog will be displayed:

Optimisation



Place a tick next to any measure you wish to optimise.

Measures *higher* in the list are optimised before measures *lower* the list. You can order the list by using the up/down arrows to the right.

Reduce Vacant Slots instructs Auto Fill to seek the lowest possible number of Vacant Slots.

Optimise for Usage Targets tells Auto Fill to seek the lowest possible Average Usage Error.

Optimise for Association Preferences tells Auto Fill to seek the highest possible Association Satisfaction Score.

Increase Participation tells Auto Fill to seek the highest number of participants.

Terminate when…

Auto Fill will keep generating schedules until any one of these conditions is met (see table below).

Terminate Condition	Means stop generating schedules when…
Iterations exceed	*x* schedules have been generated
Time Exceeds	*x* schedules have elapsed
No improvement after	no improvement in the optimisation measure/s has been made after *x* iterations

Quick Fill

The **Quick Fill (Function key F9)** button is useful if you want to perform just one generation of a schedule, then check it manually. Quick Fill does not iterate or attempt to improve quality measures. However it will still usually generate a reasonable schedule.

AutoFill Options

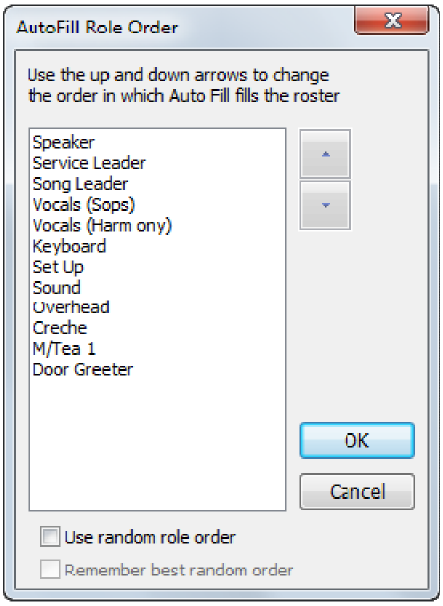
Selecting the Options button will show the AutoFill options dialog (page 123). You can then specify: Look-back days (see page 70), Global enforced breaks. Also on this page you can select "Role order", and "Advanced settings" (see below).

Specifying the AutoFill role order

The Automatic Scheduler will assign all time slots not already assigned and locked in. It will attempt to satisfy as many associations as possible while also meeting usage targets and role requirements (how many positions in each role).

The scheduler fills the schedules in the order you specify by selecting the **Schedule | Set Auto Fill Order** menu, or click Role Order in the AutoFill tab of the Options dialog.

The following dialog displays.



Select a role (by clicking on it) and use the up and down buttons to change the order of the list of roles.

SmartRoster fills the schedule in the order specified (from top to bottom).

In practice it is best to put the most critical roles (important roles or those with the most constraints or least role members) higher in the list.

Note, AutoFill order does not effect the order in which roles display or print out. The display order can be changed by drag-and-dropping the columns in the schedule grid.

Tick "Use random role order" to tell the scheduler to randomise the role order. You may wish to do this if you are unsure which role order will generate the best schedules. If you also tick "Remember best random order" then SmartRoster will save the order of the roles for those schedules it keeps.

Advanced AutoFill settings

Note!

In general you *should not need to alter any of these settings* to obtain an acceptable schedule. However, some users will have different needs that the settings "out of the box" do not meet adequately. In this case you may find changing these settings produces a better match for your organization.

Advanced settings gives the user access to parameters that effect the way SmartRoster selects role members for a timeslot from those available to fill the slot.

When selecting a person for a timeslot, SmartRoster iterates through the list of all potential occupants (based on the role members AND the availability of each role member for that particular timeslot). SmartRoster compares each potential occupant with every other potential occupant. Depending on the parameter being compared, it will choose the person who has the:

- Best (highest) combined score
- Highest target percent
- Least times scheduled for role (including the look back period)
- Least recently scheduled date
- Lowest number of possible events they can fill
- Not selected in scheduling period
- Least times scheduled (all roles)
- Least times scheduled for role (*not* including the look back period)
- Best (highest) usage score

These tests are called "occupant selection heuristics" and are simply rules-of-thumb applied to quickly choose between two people. In most cases, using them greatly decreases the time SmartRoster takes to find a reasonable solution. You can have SmartRoster ignore these completely by unticking the box. This may be required in your case if the number of Unique Scores in the Build Progress box stops increasing regardless of the number of iterations performed.

The tests are applied in the order specified in the Advanced settings. A test that is not ticked is not used. If the two being compared have the same value being tested (eg, combined score) then the next test is tested. As soon as one or the other of the pair satisfy a test then they become the preferred candidate and they are compared to the next potential occupant until all potential occupants are tested.

By changing the order of these tests, and/or enabling or disabling them, you can change the way SmartRoster selects individuals for timeslots.

For instance, to make sure that everyone is scheduled at least once before anyone else is used for role, move the test "6. Not selected in scheduling period" to the top of the list and tick it. This means that anyone who has never been scheduled in the current period for a role will be selected in preference to potential occupants that have been used at least once, but after everyone has been used once then the other tests come into play.

The "Combined score" is the most important calculated parameter and includes the usage score (which reflects the difference between actual and desired usage) and a score that reflects associations – such as keep-together, keep-apart, or event priority associations.

Randomise Weighting

If Randomise weighting is checked then SmartRoster will randomly change the weighting between the usage score and the association score between different builds of the schedule.

Pref. Score Exponent (PSE)

This is the exponent (when divided by 100) to which the initial association score is raised to generate the actual association score.

i.e. **actual association score = initial association score $^{(PSE/100)}$**

eg. If PSE is $\boxed{200}$ then: **actual association score = initial association score ^{2}**

This allows you to *accentuate* or *diminish* the relative significance of association scores when calculating the combined score for a potential member.

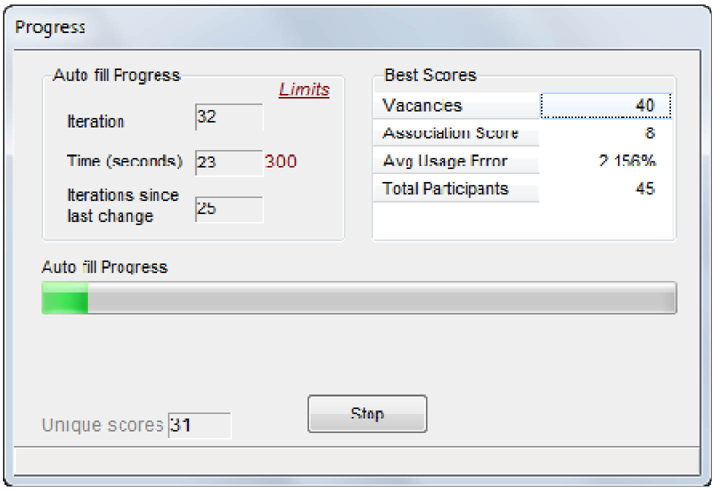
If the foregoing is meaningless to you then you should just leave these settings at their default values.

Starting the Optimiser

Once you have set these **Auto Fill** options, click **Start** to begin generating schedules.

The Auto Fill **progress** dialog is displayed which indicates progress of the Automatic Scheduler. You can stop it at any time by clicking the **Stop** button.

The ***Limits*** area indicates the terminate conditions that are currently active. The **Best Scores** area shows the best quality scores achieved so far.

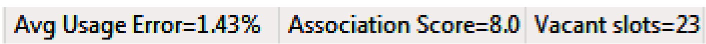


Post Fill Review

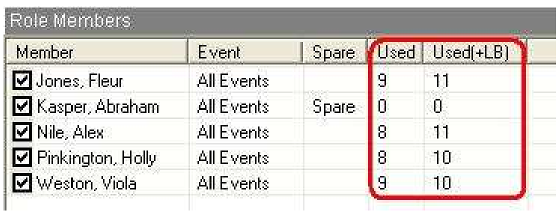
A number of tools are provided to help you review the quality of your schedule.

View current Scheduler Quality Measures

As already discussed on page 75, the Status bar contains performance measures for the current schedule (make sure **View > Status bar** is checked on the menu).



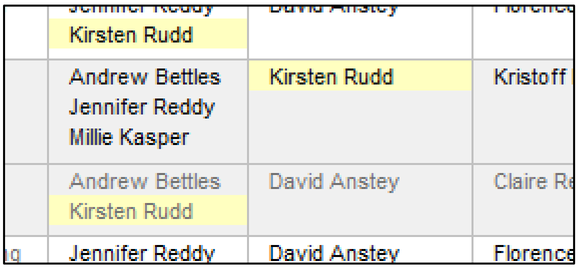
Show Usage



You can see how many times a person has been allocated to a specified role by selecting **Show Usage** from the **Role** menu. This will display extra columns in the detail view of the role members list (select Detail view from the Role members context menu). The **Used** column shows how often as person is used in the current scheduling period, while **Used(+LB)** shows how often they are used in the current scheduling period PLUS the look-back period.

You can also see how many times a person has been allocated across all roles by selecting **Show Usage** from the **People** menu. This will display the number of times used next to each persons name in the People panel. Note this only counts people scheduled in the current period – not in the look-back period, if this is set.

Where is this person?



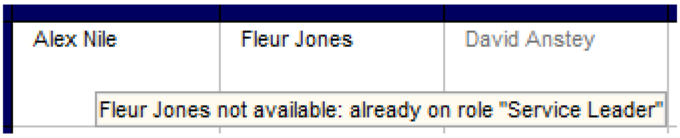
As you move the mouse pointer over the schedules grid, it will highlight in yellow the name of the person currently under the mouse pointer wherever that name appears on the schedule grid.

You may like to close the People and Events panels and maximise the SmartRoster window when reviewing the schedules.

Also you can double click on a person and select the Scheduled tab to see a list of their scheduled timeslots - including in the look back period if set.

Why couldn't this person be assigned to a timeslot?

Try to allocate a person manually, and SmartRoster will explain (**in the status bar**) why it would not allow an allocation.



Common Problems

Some people are scheduled too often and some people not at all! Why is this?

There are many reasons why this can happen.

A common reason for this is that the people without a usage target (the **non-fixed** role-members) are being scheduled too often (usually linked to association preferences).

SmartRoster provides a setting that allows you to determine how non-fixed role members are treated during scheduling once they have reached the internal target that SmartRoster automatically calculates for them – the non-usage targets. Under AutoFill | options, the setting **Cannot exceed calculated role member target by more than…** allows SmartRoster to exceed this non-usage target by a set amount. The higher this tolerance, the more flexibility SmartRoster has to fill vacant slots. The lower this tolerance, the more likely that role members will be used evenly – at the expense of vacancies. This setting does not effect role members with a usage target, or individual usage targets (those set for a person outside of a role).

So, the reason that some people are scheduled lots more than others is that you have allowed SmartRoster to exceed the non-usage target by setting **Cannot exceed calculated role member target by more than…** to a high value. In practice we suggest you set this to a low value (0 or 1) and run the scheduler, then increase it by increments of 0.5 or so, until vacancies are acceptable. If this requires some people to be scheduled too often this usually means you don't have enough people in those roles.

Another reason some people are not scheduled at all, or much less than their target (as shown in the role members panel), is that they may be over-constrained. They may have absences, they may be involved in an "Always keep together" association preference with their family or other individuals which cannot be met, or possible they were scheduled too many times the previous period and SmartRoster is therefore is not using them this period.

A good way to see why a person is not being utilized is to try to manually schedule the person (drag their role member record over the role timeslots). As you drag SmartRoster will show in the status bar the reason why they cannot be dropped.

Why are there so many vacancies?

SmartRoster calculates targets for each role member (those without a usage target) in such a way that there will be no vacancies, and everyone is used roughly the same number of times. The reason vacancies exists is that

1. you don't have enough people in a given role

2. you have too many associations – such as families that must be scheduled together, or individuals with mandatory associated preferences, or too many people with a restrictive usage target.

You can reduce the number of vacancies by allowing SmartRoster to use people above their non-usage targets. These are the targets that SmartRoster calculates for role members who do NOT have a fixed target specified. Under AutoFill | options, the setting **Cannot exceed calculated role member target by more than**… allows SmartRoster to exceed this non-usage target by the set amount. The higher this tolerance, the more flexibility SmartRoster has to fill vacant slots. The lower this tolerance, the more likely that role members will be used evenly – at the expense of vacancies. This setting does not effect role members with a usage target, or individual usage targets.

A particular role member has a usage target of "Avg 1 time per month", but some months they are scheduled twice in a row and some months not at all! Why is this?

If you have selected "Average over whole schedule" when you set up the usage target for this role member, or for this person, SmartRoster will try to scheduled that person such that they average their fixed limit over the whole schedule-plus look-back period (the planning horizon). So, if the planning horizon is, say, three months, the person should be scheduled three times in that period. This could be three times in the first month and nothing in the other two, or once in each calendar period. While SmartRoster will try to space it out as evenly as possible, availability of other role members may mean that SmartRoster has to choose this person twice in a short period. Satisfying association preferences is another common reason why this happens.

If you actually mean that this person should be scheduled a Maximum of 1 time per each calendar month (with the first month starting on a given date) then you should select "Maximum for each month" in the appropriate drop down box when setting that person's Usage Target (under the Update Person Details dialog – not the role member dialog). In this case don't use a role-member usage target for this person.

They may still be scheduled back to back if they are scheduled at the last week in one month and first week of the next. Another option is to use the enforced break feature for them. If you define an enforced break for a role member then this guarantees the break between timeslots within that role for that role member. If you use an enforced break for an individual (not a role member) then the enforced break will be guaranteed between timeslots for that person regardless of the role.

Finally, to determine a regular repeating pattern at which a person is scheduled you can use a pre-assignment for them. This sets exactly the pattern at which they should be scheduled (eg the first Sunday of every 2 months, or every second Thursday). This can also be set for either a role member (applying to a single role) or to an individual, applying to a group of roles or to all their roles.

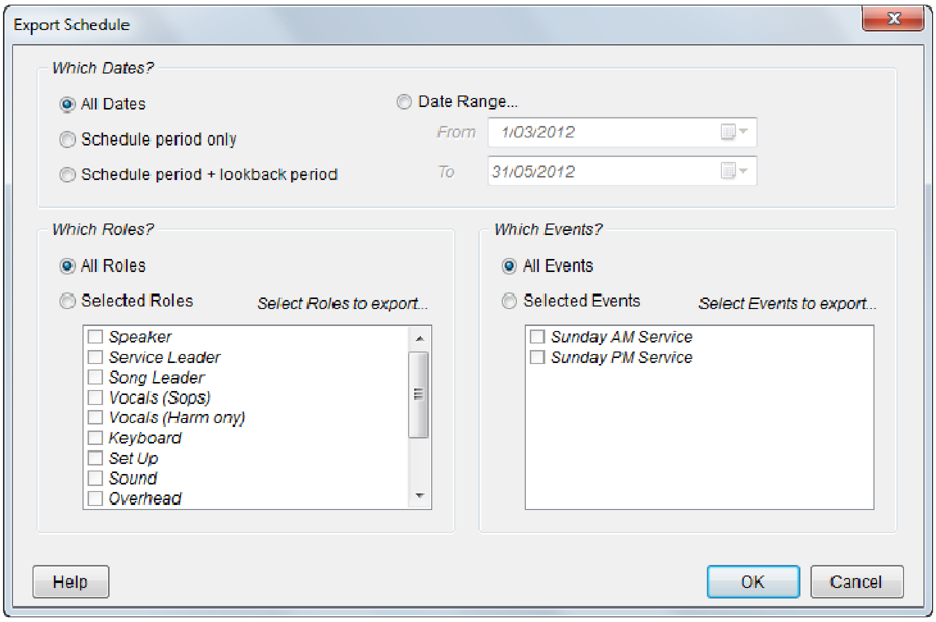
If you wish everyone to have a certain guaranteed break between scheduled timeslots then use the global enforced break (set under menu Schedule | AutoFill).

Exporting and Importing schedule data

Exporting schedules from SmartRoster

Select "Schedule > Export > As Importable data" from the main menu to export the schedule information only in a format that SmartRoster can import.

You will see the following dialog:



Select the dates, Roles, and Events from which you wish to export the schedule data. You will be asked for a filename for the export file. Enter a name and click OK and the schedule data will be saved into this file.

Importing schedules into SmartRoster

To import this data into the same or another SmartRoster file, Select "Schedule > Import" from the main menu. You will be asked for a file to import. This will be a file previously exported using the "Export > As Importable data" function. Nominate a file and click OK.

SmartRoster will then import this schedule data into the current schedule. It will ignore any schedule data for persons, roles, or events not already in the file into which it is being imported. It will NOT overwrite any schedule data already in the SmartRoster file into which it is being imported. If you wish to REPLACE existing schedule data, use the "Schedule > Clear" function within SmartRoster before doing the import.

Exporting the finished schedules to other programs

The finished schedule, as it appears in the Schedules panel, can also be exported in either **comma-delimited text** format, or as **html** format.

You can export your schedules in tab-delimited format for importing into other packages (such as Microsoft Excel or Word).

1. Select the **Schedule > Export** menu. The following dialog box will display:
2. Select the desired type of format to export:
   - To save as Tab delimited format select "Tab delimited text format" in "Save as type" box.
   - To save as html format select "HTML format" in "Save as type" box.
3. Type in the name of a file to export to and click "**Save**".

You can also export schedules in SmartRoster SRP, Acrobat PDF format, and Windows WMF, and into MS Word (2000 or above) via the reporting function. See page 97. This provides considerably more options regarding layout.

Importing an html file into MS Word

To import an HTML file into MS Word, use the "Insert | File" menu.

Importing a Tab delimited file into MS Word

The following is a guide to importing a Tab delimited file into MS Word (the following commands apply to MS Word):

1. Start a new document in Word (Select menu "File | New Document")
2. Optionally select menu "File | Page Setup" and set the margins to one inch or less, page layout landscape
3. Select menu "Insert | File" and select the *.txt file you exported in tab delimited format
4. Select all text and do "Table | Convert | Text to Table". In the dialog select "Auto fit to contents" and "Separate text at Tabs" and OK
5. Optionally change the font as desired (eg Arial 8 point fits more on the page)
6. Select menu "Edit | Replace" and replace ";" with "^l" (without the quotes) select "All" in Search options, and click Replace All

Attendance monitoring and reporting

Attendance allows you to define historic attendance status flags, and to set and report how the persons scheduled performed according to the published scheduled.

Defining Attendance status flags

To define your Attendance flags, select File | Options and select the Other tab.

The bottom panel is called "Attendance status (one per line)". Simply type each Attendance status you wish to use, one on each line.

Eg.

Did not attend - found replacement
Did not attend - replacement not found - coordinator notified
Did not attend - replacement not found - coordinator not notified

Click OK to save the list.

Setting personnel attendance for historic schedules.

Make sure the Schedules panel is visible.

Right click on any person in any role and select "Add Attendance". This will show the Attendance status flags you created in the first step. Simply select one of these. You will notice that a small red "A" appears next to the name of that person in the Schedules panel, indicating to you everyone who has an Attendance status attached.

Reporting Attendance status

1. Select *Inventory* from the *Report* menu.
2. Select "Attendance" in the Report Type drop down box.
3. Select the rest of the items you wish to see on the report, especially the persons, roles, events, and dates.
4. Click OK to run the report.

This report will have a single column for each Attendance status you defined. It will also have a row for every person you selected to report on in the Report Parameters dialog, with totals for each Attendance status at the bottom of the report.

CHAPTER 6
Reports

How do I generate reports?

Chapter Contents

SmartRoster provides you with a number of options for viewing and printing schedules and personnel data.

Introduction

The most important report generated by SmartRoster is the Master Schedule (see below) or the Individual Schedule. You can send out a single master copy or have SmartRoster generate a personalized version for each person or household, which has the person's name highlighted on the schedule.

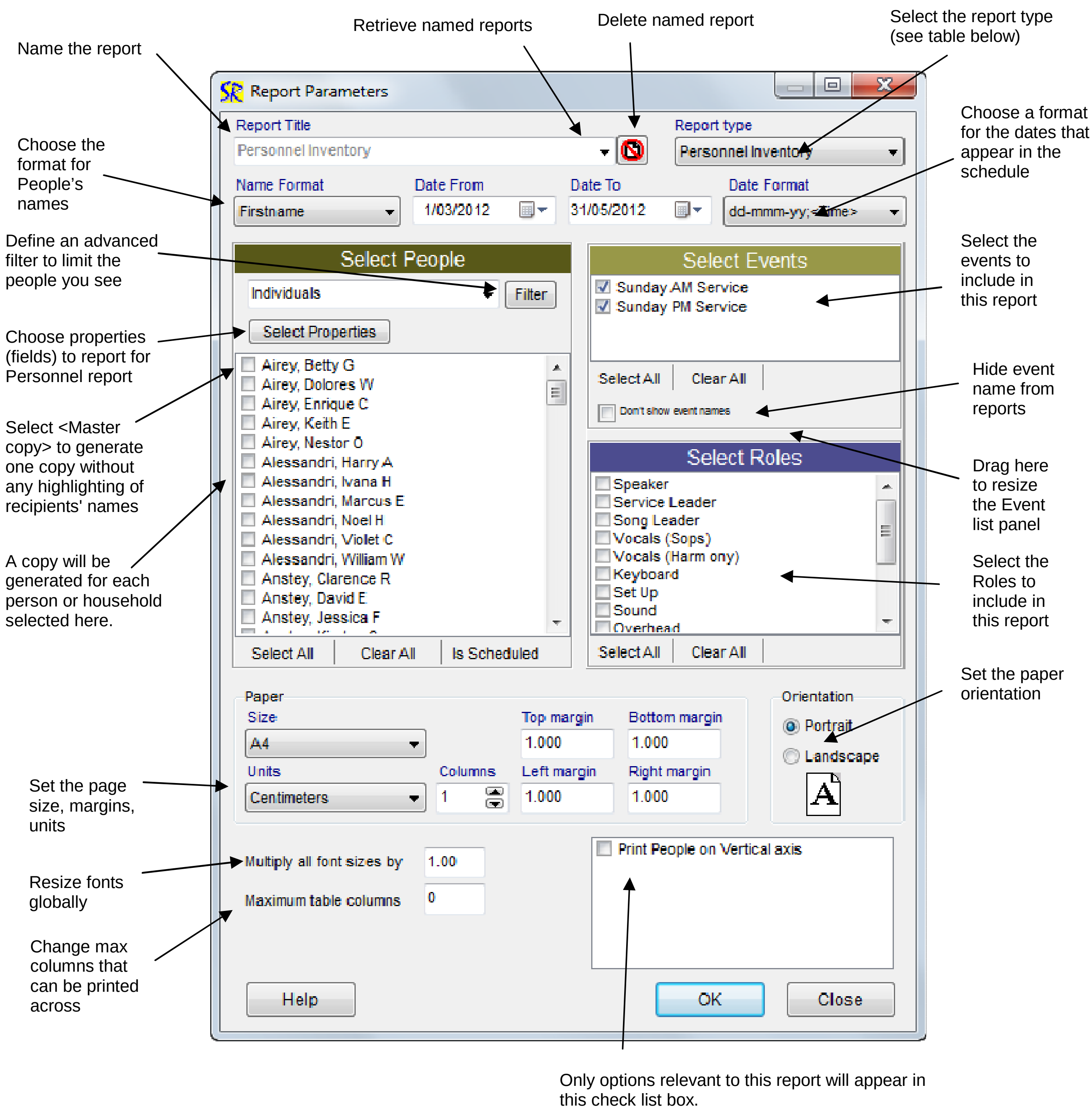
Report Types

Schedule reports	Individual Schedule	Prints only an individual's scheduled roles, for each recipient
	Event per page	Prints a schedule for each occurrence of each selected event on a separate page
	Role per page	Prints a schedule for each selected role on a separate page
	Master Schedule	Prints all selected roles, for each recipient
	Master II Schedule	Prints all selected roles, for each recipient
	Calendar View	Prints each month on a separate page in a standard Calendar format
Address book reports	Household Directory	Prints the address book report
	One-line directory	Prints the address book – one line per person
Label reports	Mailing Labels	Reports addresses in a grid format suitable for printing directly onto mailing labels
	Reminder Labels	Reports each selected individual's schedule in a grid format suitable for printing directly onto mailing labels
Inventory reports	Role Inventory	A summary report of each role's data, including contact, events and compatible roles, and role member data
	Personnel Inventory	A table of user-selected columns reported in a handy table format suitable for copy and pasting into other programs such as Word or Excel
	Role Members	Prints a list of persons available in each role/event
Analysis reports	Role Distribution	Shows how many times each person is used in each role
	Event Distribution	Shows how many times each person is used in each event
	Distribution Summary	Shows number of times scheduled in each event/role
	Attendance	Shows all attendance counts by person by attendance flag
	Association Satisfaction	Shows for each association whether number of times kept vs not kept

Report Parameter Entry dialog

To create any of the schedule reports choose **Schedules** from the **Reports** menu.

The **Report Parameters** window will be displayed.



Report Title	This title will appear on the header of each page of the report. All the following settings will be saved with the name of the report you type in here.
Report Type	See above
Name Format	The format in which names will appear in the schedule (eg, only preferred names, First name and last name)
Date Format	The format in which event occurrences will be labelled (the first column in the schedule grid)
Select People	*Individuals* — Print one copy of the schedule for each selected individual, highlighting anywhere that the individual is scheduled *Households* — Print one copy of the schedule for each selected household, highlighting anywhere that any person from the household is scheduled *Each member of selected households* — Print one copy of the schedule for each individual in the selected households, highlighting anywhere in which that individual is scheduled
Select Events	Exclude from the report any event not selected
Select Roles	Exclude from the report any role not selected
Paper settings	*Size* — Set the size of the paper *Margins* — Set the non-printing margins (in the units selected in "Units" *Units* — Set the Units to use for margins (Centimetres or Inches) *Columns* — Set the number of columns to lay out on a single page. Effectively allows multiple logical pages per physical page *Orientation* — Set the way the report is printed on the page. Portrait means print across the narrowest dimension. Landscape means print across the broadest dimension.
Multiply all font sizes…	Set this value to change the default size of fonts. The relative sizes are not changed (such as the size of the title font compared to the table text), but this changes ALL fonts by the factor you enter into the box. Less than 1 will cause all fonts to shrink. Greater than 1 will expand all fonts.
Max table cols	For a number of reports this item allows the user to specify the maximum table columns to report. SmartRoster will then split the table over a number of pages if necessary to display the report using no more than the specified number of table columns.
Report Measure	Some analytical reports allow the user to specify which measure to report: Count, Hours, or Cost.
Create PDF	If you wish to save the report in PDF format (say, for sending to someone else, or as a permanent copy) you can tick this checkbox. Keep in mind that this will slow down report generation.
Hide dates..	Hide dates (event occurrences) not applicable to the recipient of the report
Print roles on vert axis	For certain reports this allow you two switch the axis so that role go down the page instead of across. This may allow the report to fit better on the page.
Hide names..	Hide names of people other than the recipient (or members of recipients family)
Show Attendance columns	This options applies to the Event-per-page report. It adds a column for each attendance flag you have defined. You can then use the report as a sign-in sheet for the event coordinator to use to indicate the attendance status of each person scheduled for that event.
Collate pages for Booklet style	This options applies to the Address book report. This setting causes pages to be generated in the correct order for printing booklet style reports. This means: landscaped, two columns per page, printed on both sides, placed on top of each other and stapled in the middle.
Show Contact List	Some Schedule reports will optionally print a contact list with the report showing all those scheduled in the report, together with their contact phone number
Combine events	Click this option for Master II report, will report all events on the same date in a single table column with the event name and time prefixed

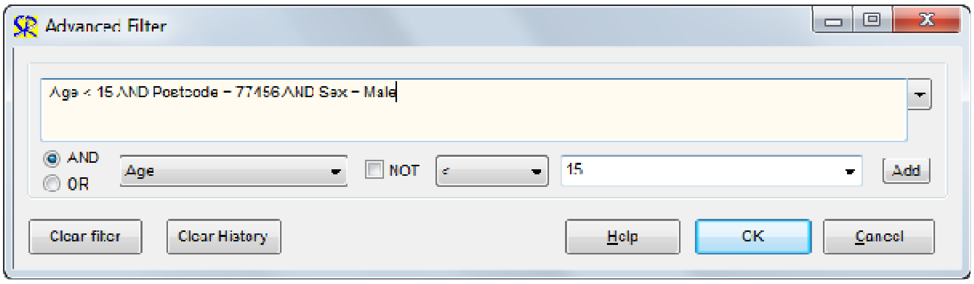
Advanced Filter

An filter button allows you to show only that people records that match selected attributes from your people records. You can apply a filter to the People panel in the main window, or to any report in the Report Parameters dialog.

Fields that can be filtered include: Address, Age, Cell phone, Email, Events, Fax, Fixed Phone, Fullname, Groups, Notes, Postcode, Preferred Name, Roles, Sex, State, Surname, Title, Town.

Click on the **Filter** in the Report Parameters or Group Members dialog or **F** button in the People panel to activate the Advanced Filter dialog box.

SmartRoster also remembers previous filters you have used and you can select one of these by clicking on the down arrow next to the filter text box.



This example shows a filter which will only select people records for those less than 15 years old with postcode=77544 who are male.

To create a filter:

1. Select an item from each drop down box, or type in a value (in the 3rd drop down box)

   If you have chosen "Matches" in the second drop down box, you can type in a pattern into the 3rd box. The pattern can contain any number of characters or digits and you can use * to match any string(or nothing) and use ? to match any single character. For instance, to find everyone whose surname starts with "J" enter the patters "J*" into the 3rd box.

2. click the Add button

3. To add another criteria, select "and" or "or" then repeat steps 1 and 2

4. To finish click OK

To clear a filter (stop filtering):

1. Click the Clear filter button

2. To finish click OK

The filter will be saved with the current report if you are editing report settings. When used with a report it will limit the people that may be selected for the report to only those that match your criteria.

To clear the filter history:

1. Click the Clear History button

Schedule Reports

Master Schedule

St Stephen's Anglican

Sarah Anstey

Master Schedule

Contact:	Speaker	Service Leader	Song Leader	Vocals (Sops)	Vocals (Harmony)	Keyboard	Set Up	Sound	Overhead	Creche	M/Tea 1	Door Greeter
04-Mar-2012 Sunday AM Service	Alex	Fleur J	David	Andrew B Kirsten R Millie	Florence S	Lynley	Clarence A	Claire	Arthur	Jennifer	Doris Kathy	
04-Mar-2012 Sunday PM Service	Alex	Fleur J	Abraham	Jennifer Kirsten R	David	Florence S	Clarence A	**Sarah**	Warwick	Justine	Jackie Kristen	Nestor A
11-Mar-2012 Sunday AM Service	Holly	Viola W	Bill	Andrew B Jennifer Millie	Kirsten R	Kristoff	Enrique	Florence S	Elizabeth	David	Jackie Kristen	Lynley
11-Mar-2012 Sunday PM Service	Alex	Viola W	Lynley	Andrew B Kirsten R	David	Claire	Bill	Barry	Norman A	Florence S	Doris Kathy	Nestor A
18-Mar-2012 Sunday AM Service	Alex	Holly	Justine	Jennifer Kirsten R Millie	David	Florence S	Bill	**Sarah**	Ivana	Clarence A	Amelia H Lynley	Lynley
18-Mar-2012 Sunday PM Service	Alex	Holly	Abraham	Andrew B Jennifer	Kirsten R	Lynley	Enrique	Claire	Amelia H	**Sarah**	Justine Leo	Leo
25-Mar-2012 Sunday AM Service	Fleur J	**Sarah**	Lynley	Andrew B Kirsten R Millie	David	Claire	Clarence A	Alex	Warwick	Viola W	Florence H Kirsten A	Holly
25-Mar-2012 Sunday PM Service	Alex	**Sarah**	David	Jennifer Kirsten R	Florence S	Kristoff	Clarence A	Barry	Arthur	Amelia H	Diana Michael R	Holly
01-Apr-2012 Sunday AM Service	Alex	Bill	Bill	Andrew B Jennifer Millie	Kirsten R	Florence S	Phillip	Barry	Norman A	Kathy	Beth Kristen	Holly
01-Apr-2012 Sunday PM Service	Alex	Bill	Bill	Andrew B Kirsten R	Florence S	Lynley	Phillip	**Sarah**	Elizabeth	Diana	Amelia H Jackie	Holly
08-Apr-2012 Sunday AM Service	Viola W	Justine	Justine	Jennifer Kirsten R Millie	Florence S	Claire	Bill	Alex	Amelia H	Nestor J	Doris Kathy	Holly
08-Apr-2012 Sunday PM Service	Alex	Justine	Justine	Andrew B Jennifer	Kirsten R	Kristoff	Enrique	Florence S	Ivana	Michael R	Kathy Kristen	Holly
15-Apr-2012 Sunday AM Service	Alex	Lester	Bill	Andrew B Kirsten R Millie	David	Lynley	Clarence A	Claire	Kathy	Phillip	Jackie Justine	
15-Apr-2012 Sunday PM Service	Alex	Lester	Justine	Andrew B Jennifer	Kirsten R	Florence S	Clarence A	Claire	Warwick	Leo	Doris Lynley	Lynley
22-Apr-2012 Sunday AM Service	Alex	David	David	Jennifer Kirsten R Millie	Florence S	Kristoff	Enrique	Barry	Arthur	Olive	Diana Leo	Leo
22-Apr-2012 Sunday PM Service	Alex	David	David	Andrew B Kirsten R	Florence S	Claire	Bill	**Sarah**	Norman A	Millie	Florence H Kirsten A	Lynley

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The Master schedule format shows all or selected roles, including those roles that an individual is not on, highlighting the individual (recipients) name wherever it appears.

Individual Schedule

St Stephen's Anglican

Justine Armstrong

Individual Schedule

Contact:	Service Leader	Song Leader	Creche	M/Tea 1
04-Mar-2012 Sunday AM Service	Fleur J	David	Jennifer	Doris Kathy
04-Mar-2012 Sunday PM Service	Fleur J	Abraham	**Justine**	Jackie Kristen
11-Mar-2012 Sunday AM Service	Viola W	Bill	David	Jackie Kristen
11-Mar-2012 Sunday PM Service	Viola W	Lynley	Florence S	Doris Kathy
18-Mar-2012 Sunday AM Service	Holly	**Justine**	Clarence A	Amelia H Lynley
18-Mar-2012 Sunday PM Service	Holly	Abraham	Sarah	**Justine** Leo

The individual schedule shows the schedules for all roles the recipient is required to serve. Once again, the name of the recipient is highlighted wherever it appears.

Event-per-page report

The Event per page report shows all people that are required for all selected roles and events on a particular occurrence of an event.

A single page is printed for each date and time that an event is scheduled.

Creating a sign-in sheet

If "show attendance columns" is ticked, a column for each attendance flag you have defined is added. You can then use the report as a sign-in sheet for the event coordinator to use to indicate the attendance status of each person scheduled for that event.

Role-per-page report

This report puts each role report on a single page. It is useful if you have different people responsible for each role so that you can give them a copy of their own report for review or feedback.

General Purpose Master Copy

You may wish to print a copy of the schedule without specifying who it is for (say, to keep a number of spares, or to photocopy), that is, a copy not highlighted for any specific individual. To do this, when entering details in the **Schedule Reports** window, select "<Master Copy>" as one of the report recipients in the "**Select merge recipients**" panel.

"New File" wizard on new files

Inventory Reports

To create any of the Inventory reports choose the **Reports | Inventory** menu. Inventory reports are provided to make review of all the individual and role data easier, especially where more than one person is responsible for this data. These reports are useful for verifying personal, role, or role member information prior to each scheduling cycle.

Personnel Inventory

The personnel inventory provides a concise summary of all information contained in the SmartRoster file regarding each person. It is formatted as a person-per-page report and can be conveniently emailed to each individual for their verification of errors or changes to associations.

Role Inventory

The role inventory report conveniently summarises all information currently contained in the SmartRoster file for each role in turn. It is formatted as a role-per-page report and can be conveniently emailed to each Role coordinator (if this is provided for a role) for the coordinator's verification of errors or changes.

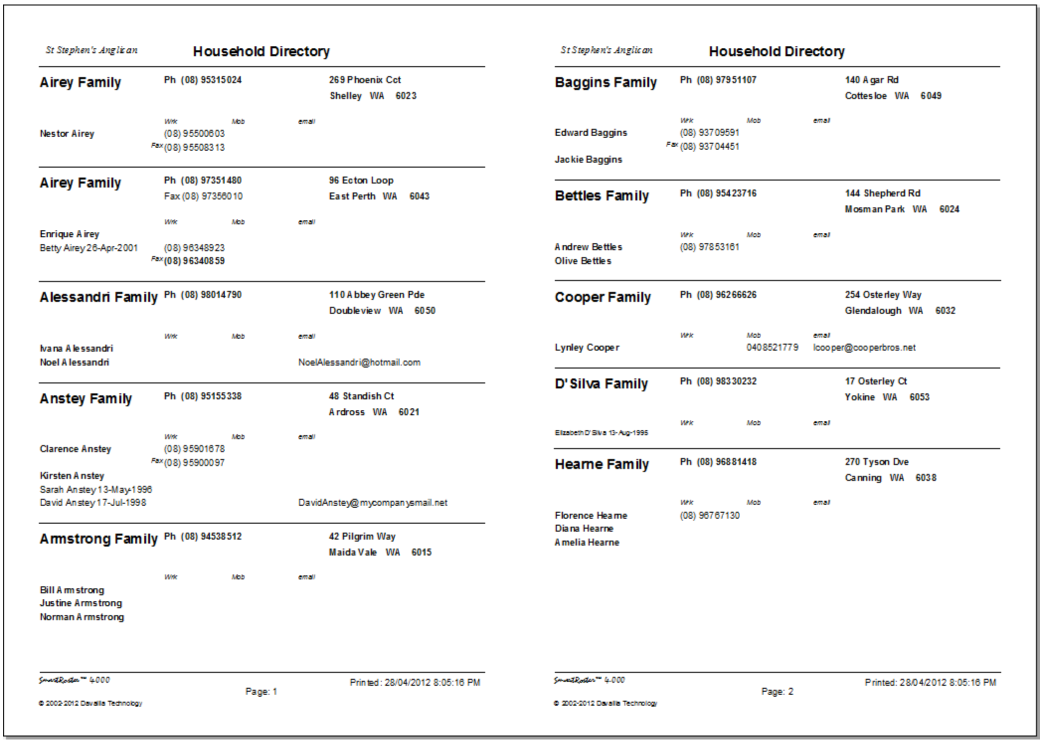
Role Members

The Role Members report provides a separate page for each combination of Role and Event. It is a useful contacts list for distributing to each person in the Role/Event combination.

Address Book Report

The address book report is available by selecting **Address Book** from the **Report** menu.

An example is shown:


St Stephen's Anglican
Household Directory

Airey Family Ph (08) 95315024 269 Phoenix Cct, Shelley WA 6023
Wrk Mob email
Nestor Airey (08) 95500603
Fax (08) 95508313

Airey Family Ph (08) 97351480 96 Ecton Loop
Fax (08) 97356010 East Perth WA 6043
Wrk Mob email
Enrique Airey
Betty Airey 26-Apr-2001 (08) 96348923
Fax (08) 96340859

Alessandri Family Ph (08) 98014790 110 Abbey Green Pde, Doubleview WA 6050
Wrk Mob email
Ivana Alessandri
Noel Alessandri NoelAlessandri@hotmail.com

Anstey Family Ph (08) 95155338 48 Standish Ct, Ardross WA 6021
Wrk Mob email
Clarence Anstey (08) 95901678
Fax (08) 95900097
Kirsten Anstey
Sarah Anstey 13-May-1996
David Anstey 17-Jul-1998 DavidAnstey@mycompanysmail.net

Armstrong Family Ph (08) 94538512 42 Pilgrim Way, Maida Vale WA 6015
Wrk Mob email
Bill Armstrong
Justine Armstrong
Norman Armstrong

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St Stephen's Anglican
Household Directory

Baggins Family Ph (08) 97951107 140 Agar Rd, Cottesloe WA 6049
Wrk Mob email
Edward Baggins (08) 93709591
Fax (08) 93704451
Jackie Baggins

Bettles Family Ph (08) 95423716 144 Shepherd Rd, Mosman Park WA 6024
Wrk Mob email
Andrew Bettles (08) 97853161
Olive Bettles

Cooper Family Ph (08) 96266626 254 Osterley Way, Glendalough WA 6032
Wrk Mob email
Lynley Cooper 0408521779 lcooper@cooperbros.net

D'Silva Family Ph (08) 98330232 17 Osterley Ct, Yokine WA 6053
Wrk Mob email
Elizabeth D'Silva 13-Aug-1995

Hearne Family Ph (08) 96881418 270 Tyson Dve, Canning WA 6038
Wrk Mob email
Florence Hearne (08) 96767130
Diana Hearne
Amelia Hearne

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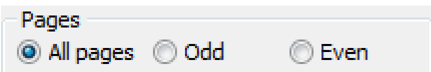
The usual format is a landscaped page with two columns per page. This is useful for producing booklet-style address books for your organization.

You may prefer to print it in a one-column-per-page portrait layout format and use a duplexing printer or photocopier to produce the final reduced 2 pages-per-page double-sided booklet style output.

You cannot publish this report to Word.

To print a booklet with a single sided printer

1. Select **Report** > **Address Book**;
2. Make sure **Report Type** is set to "Household Directory";
3. Set the page size to **A4** or **Letter** (or similar);
4. Tick the box "Collate Pages for booklet style printing" (This automatically sets the page orientation to Landscape and the Columns to 2) and **click OK**
5. Click the Printer icon
6. Select **Even** pages
7. Click **OK**



8. Now turn the printed pages over and reinsert them; You may need to experiment with whether to reverse the page order before reinserting them into the printer tray. Note: some printers do not print well on pre-printed paper.
9. Repeat from step 5, but this time print the **odd** pages.

10. Lay all pages on top of each other in the appropriate manner so that when folded in half they page correctly according to the printed page numbers.

Analysis Reports

Role Distribution

The Role Distribution report shows how many times each person is scheduled in each role. By selecting only certain events you can also show how many times people are scheduled to specific events. The report also shows the target against which SmartRoster is trying to allocate people. The target is only shown if you select the full scheduling period – including the look-back period, since the targets always include any look-back period set.

Attendance

If you have created attendance flags and assigned these to people in the schedule then you can report against each person how many times they appear against each attendance flag.

Association Preference satisfaction

The Association Preference satisfaction report shows you the degree to which association preferences have been satisfied. While SmartRoster tries to satisfy as many as possible, it is usually not possible to satisfy all of them. This report shows exactly who has, and who has not, been able to be accommodated. Columns include:

Constraint	Always together, Always apart, etc
Together	The number of times the people in an association group are all on together
Apart	The number of times the people in an association group are NOT all on together
% Together	The average percent of persons in the association group that are scheduled together (useful for families or groups)
Violation	If a rule violation exists: may be blank, Minor, or Major. A Major rule violation is when the constraint is Always together or apart and this is not strictly kept.

Printing Labels

Mailing Labels

To produce mailing labels select **Labels** from the **Report** menu. Then select "Mailing Labels" in the Report Type drop down box if not already showing.

An example is shown:

Abraham Kasper 160 Blackwood St Stirling WA 6034	Amelia Hearne 270 Tyson Dve Canning WA 6038	Ashley Armstrong 42 Pilgrim Way Malda Vale WA 6015
Albert Bettles 144 Shepherd Rd Mosman Park WA 6024	Amelia Jones 213 Abney Pl Lathlain WA 6013	Ashley Shalvey 238 Bishop Riley Pl Ballajura WA 6000
Albert Ladbrook 75 Robinson Cl North Beach WA 6004	Amethyst Shalvey 238 Bishop Riley Pl Ballajura WA 6000	Barry Mansell 238 McNess Cr Darch WA 6006

A typical format is a portrait layout with two or three columns and 10 rows per page. The number of rows and columns is configurable. Use the paper settings to change the margins, rows, and columns to fit your preferred label size. Remember to change to Report Title to save your settings.

Reminder Labels

Reminder labels are useful for attaching to mailed out pieces. These are similar to the email reminders, but of use with those who do not have email.

To produce mailing labels select **Labels** from the **Report** menu. Then select "Reminder Labels" in the Report Type drop down box if not already be showing.

Now select the date range for which you want reminders printed.

An example is shown:

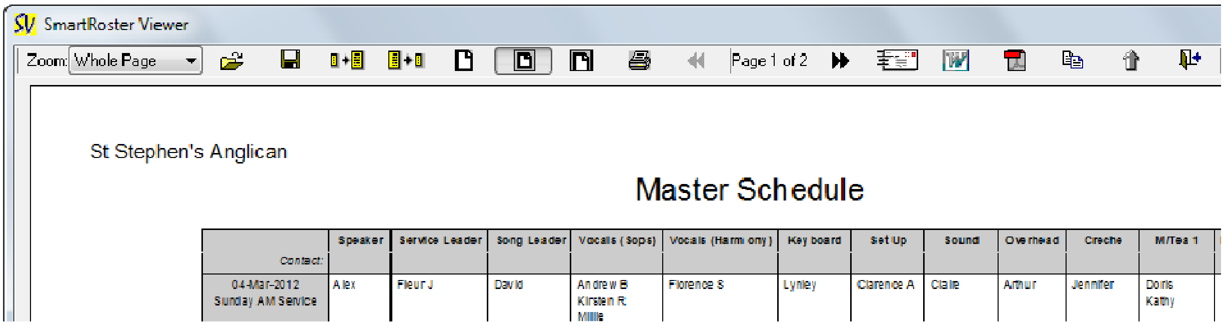
Abraham Kasper 4/03/2012 7:00pm / Sunday PM Service / Song Leader 18/03/2012 7:00pm / Sunday PM Service / Song Leader	David Anstey 4/03/2012 10:00am / Sunday AM Service / Song Leader 4/03/2012 7:00pm / Sunday PM Service / Vocals (Harmony) 11/03/2012 10:00am / Sunday AM Service / Creche 11/03/2012 7:00pm / Sunday PM Service / Vocals (Harmony) 18/03/2012 10:00am / Sunday AM Service / Vocals (Harmony)	Justine Armstrong 4/03/2012 7:00pm / Sunday PM Service / Creche 18/03/2012 10:00am / Sunday AM Service / Song Leader 18/03/2012 7:00pm / Sunday PM Service / M/Tea 1
Alex Nile 4/03/2012 10:00am / Sunday AM Service / Speaker 4/03/2012 7:00pm / Sunday PM Service / Speaker 11/03/2012 7:00pm / Sunday PM Service / Speaker 18/03/2012 10:00am / Sunday AM Service / Speaker 18/03/2012 7:00pm / Sunday PM Service / Speaker	Fleur Jones 4/03/2012 10:00am / Sunday AM Service / Service Leader 4/03/2012 7:00pm / Sunday PM Service / Service Leader	Kirsten Rudd 4/03/2012 10:00am / Sunday AM Service / Vocals (Sops) 4/03/2012 7:00pm / Sunday PM Service / Vocals (Sops) 11/03/2012 10:00am / Sunday AM Service / Vocals (Harmony) 11/03/2012 7:00pm / Sunday PM Service / Vocals (Sops) 18/03/2012 10:00am / Sunday AM Service / Vocals (Sops) 18/03/2012 7:00pm / Sunday PM Service / Vocals (Harmony)

SmartRoster Viewer

The SmartRoster Viewer is the program that allows you to preview and print reports. You can also save reports to the SmartRoster Print Document format (*.srp) or individual pages can be saved in Windows Metafile format (which can be inserted directly into MS Word and some graphics programs). When the SmartRoster viewer is being run from within SmartRoster, reports can also be saved in Adobe Portable Document Format (pdf).

You can also publish a report directly into MS Word (currently only tested for Word 2000), which allows you to then edit the report before printing it.

Click **OK** in the **Schedule Reports** window to build the report and preview it in the SmartRoster Viewer. You will see the following window.

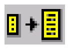


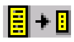
The Viewer Toolbar

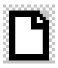
The functionality of the viewer is available by selecting icons in its toolbar.

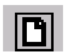
 Open a report that has previously been saved in srp format.

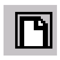
 Save the report as SmartRoster printout or windows metafile format

 Zoom in (increase the magnification)

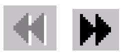
 Zoom out (decrease the magnification)

 View at full size

 Fit the whole page in the window

 Fit the page width in the window

 Print the report

 Move to the previous/next page

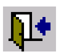
*  Email the report to all recipients who have an email address (see page 100)

*  Use the Adobe Acrobat Reader to view the report (where this is installed). This also allows the report to be searched.

*  Publish the report into Microsoft Word 2000 or above (see next section)

 Publish the report to a Web server

 Copy the contents of the displayed report to the clipboard

 Close the SmartRoster viewer

* **Note:** these options are only available where the viewer is being run from within SmartRoster itself. Other users accessing SmartRoster reports (srp files) using the Viewer will not see these options

Copy to Clipboard copies the text from the displayed report in a tab-delimited format into the Windows™ clipboard, ready to be pasted into any application of your choice, such as MS Excel or MS Word. This may be especially useful for those with earlier versions of Word, for which the "Publish to Word" option does not work.

Publish Report To MS Word

The Publish to Word button attempts to re-create the report in MS Word. This button will only be visible if you have some version of MS Word installed on the computer on which you are running SmartRoster.

This functionality requires MS Word 2000 or higher. This means it may only partially work (or not at all) on earlier versions of Word.

Note: The interface between SmartRoster and MS Word is quite slow. A report will typically take 10 to 50 times as long to render the report in Word as it does in the SmartRoster viewer itself.

The address book report cannot be published to Word in this way.

Publish Report to Web server

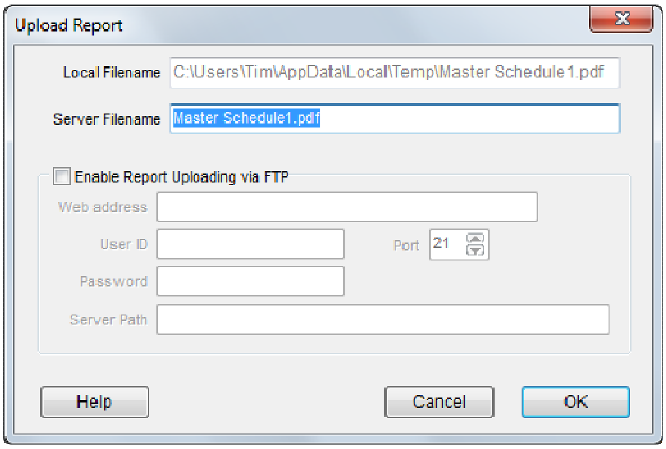
The Publish report to Web server button will allow you to upload the current report in the SmartRoster viewer to your church or organisational web site.

This is only useful if you have a web site and have FTP user and password to upload files to your web site. If you are not sure then contact your Church or organisation's webmaster, or contact your web site's hosting ISP and request your FTP User Id and password.

To access this feature click on the "Publish report" button in SmartRoster viewer.

This will popup a small dialog in which you can enter your FTP logon details, including your website address and the server folder to which your report will be uploaded.

An upload will overwrite any existing file with the same name. You may need to create a link somewhere within your web site to allow your people to see uploaded reports. You can also email a direct link to the uploaded file so people can download and view the file.



Options:

Enable Report Uploading via FTP

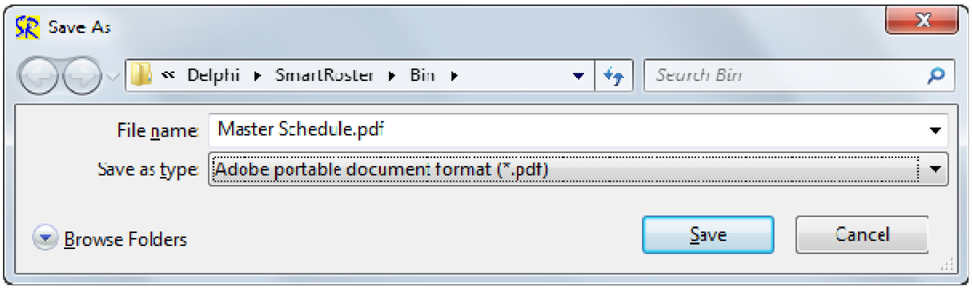
	tick this box to enable report uploading.
Server filename	This is the default name of the file to be created on the server. You can change this name.
Web address	your FTP server name, e.g: www.MyChurch.org
User ID	the FTP logon user ID provided by your ISP or webmaster
Password	the FTP logon password provided by your ISP or webmaster
Port	defaults to 21 but you can specify any port to use
Server path	the server path to which you will be connected. Your files will be uploaded into this path. Eg: /httpdocs/schedule

Exporting Reports

You may save a report to a disk file for sending to another person by email or by floppy disk or other removable media.

In the SmartRoster viewer, click the save icon .

A small dialog will display. You can select from the multiple formats supported by SmartRoster by clicking on the drop-down arrow next to the **Save as type** box and selecting a format.



Then select or type the name of a file in the **File name** box and click OK. A file with that name will be created.

***.pdf** SmartRoster can save any report as Adobe portable document format. The end user needs Adobe Acrobat Reader software, which can be freely downloaded from Adobe's web site at http://www.Adobe.com. In practice many users will already have it installed. This format is also useful for publishing to Internet Web sites.

***.emf**
***.wmf** If you select "Enhanced Metafile" or "Windows Metafile" a file will be created for each page in the report, since these formats do not support multiple pages. The filenames all start with the name you entered with an increasing numerical suffix for each page file.

CHAPTER 7
Email & SMS

Communicating by Email and SMS

Chapter Contents

SmartRoster provides you with a number of options for communicating reports, reminders, and arbitrary messages and file attachments to individuals and households via email or SMS.

Send Report By Email

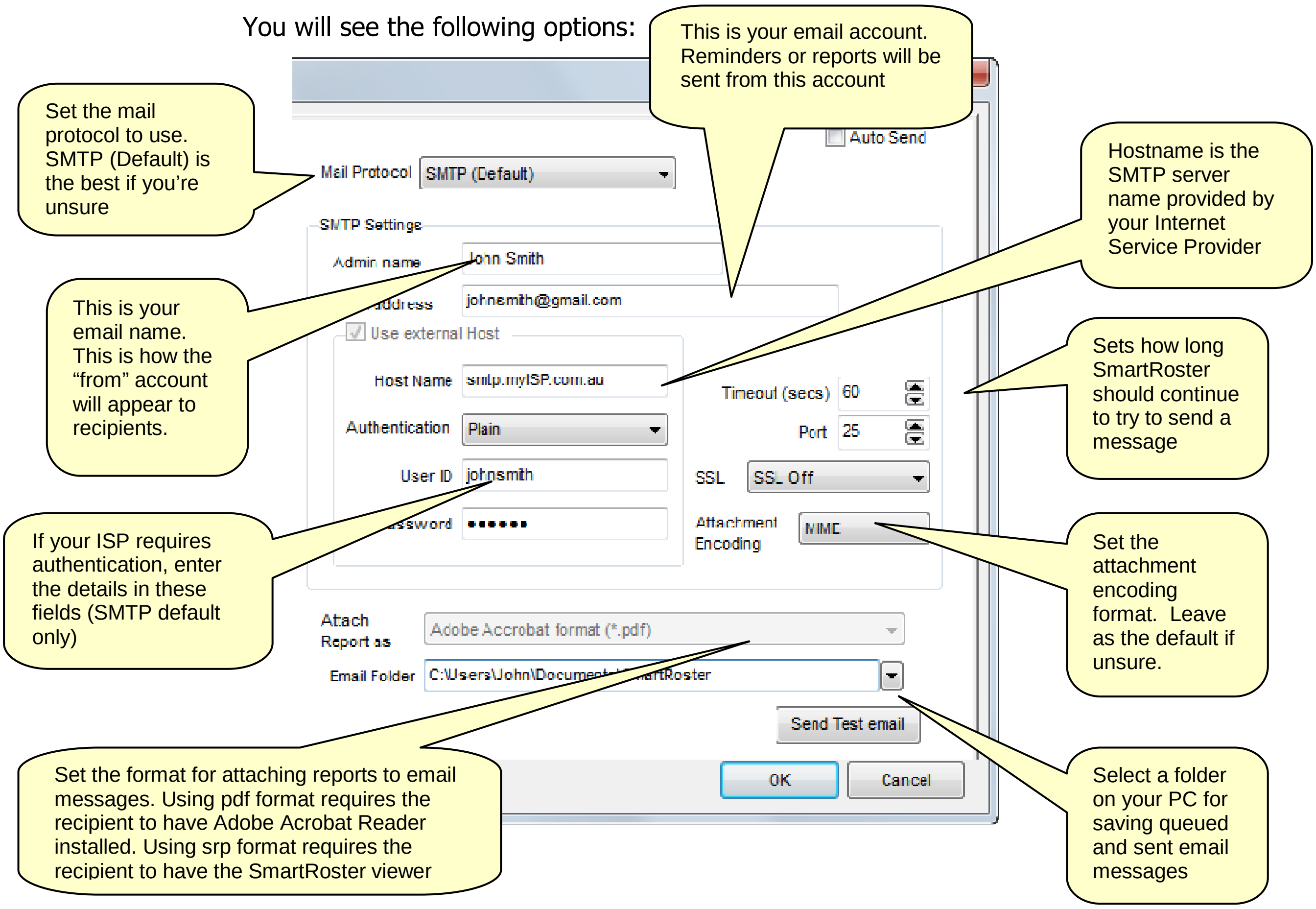
In the SmartRoster viewer select the Email icon  to send the report being viewed to all recipients who have an email address.

Email Settings

Before you can use the email facility you must enter a number of settings. To do this ***either***

- select the **Email > Options** menu, *or*
- click the Email Settings button in the Distribution window (the latter will display when you click the Email button in the SmartRoster viewer).

You will see the following options:



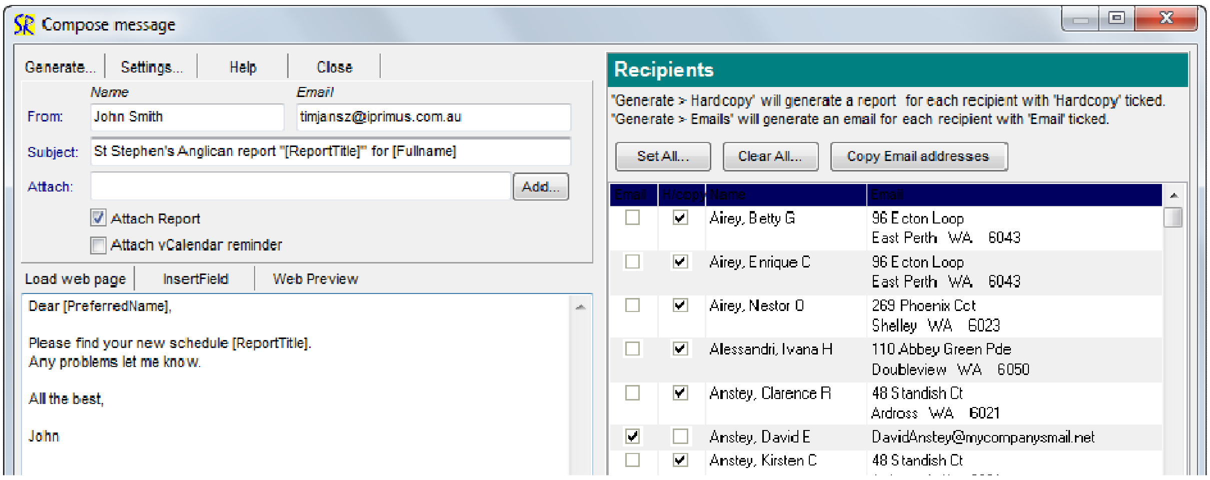
Email account:	This is your email account. Reminders or reports will be sent from this account.
Admin name:	This is your email name. This is how the "from" account will appear to recipients.
Auto Send:	When creating emails by any method, when you click "Send" they go to the Email Queue Outbox. If **Auto Send** is ticked, then they will immediately begin sending. If **Auto Send** is NOT ticked, then you have the opportunity to review/edit them before they are sent.

MAIL PROTOCOL	
"MAPI"	MAPI is appropriate if you use a Microsoft email product (like Outlook). If not sure, try "SMTP (Default)" and if this doesn't work try MAPI. If you use SMTP and don't know your external SMTP hostname, try "SMTP (Alternate)" .
	NB: If you use the MAPI protocol your messages will ignore the Email account and Admin name specified above and will always be sent by your default account as set in Outlook or Outlook Express.
"SMTP (Default)"	This is the default SMTP gateway. This method requires the External Host to be set, and allows for email authentication as required by some SMTP servers. It may be more reliable than "SMTP (Alternate)"
Use External Host:	Always ticked for SMTP (Default)
Hostname	You need to provide the Hostname which is the SMTP server name provided by your Internet Service Provider. If unsure you can sometimes find this on your ISPs web site.
Authentication	One of: > No Authentication (default value) > PLAIN. Most SMTP servers support it. However, the password is not encrypted during the transfer > LOGIN. Nearly all SMTP servers support it. The password is not encrypted > CRAM-MD5. The password is encrypted and protected from cracking > NTLM authentication (also known as Secure Password Authentication). Widely used with Microsoft products and services such as IIS SMTP > MSN authentication (alias of NTLM). Used with MSN services
Signon/Password:	Used when authentication is required (as specified above)
Connections	Not supported

COMMON SETTINGS	
Timeout	The amount of time to wait when attempting to send emails.
Encoding	This depends on the recipient email system. Usually the default setting will be adequate. Leave as the default if unsure
Attach Report as	Reports can be attached in Adobe pdf format or in SmartRoster srp format. Adobe pdf requires the recipient has Adobe Acrobat installed. Because pdf is a very common format, recipients are likely already to have this, but it is also a free download from the Internet. With the Acrobat Reader they will be able to view and print reports. Using srp format requires the recipient to have the SmartRoster viewer, SmartVue, installed (see page 95 for a discussion). SRP files are very compact and can only be read by a recipient who has access to SmartVue, thus enhancing data security.
Email Folder	The Email Folder is the location on your PC or local area network in which SmartRoster Email Queue subsystem stores emails prior to sending or for archival. It also uses this area to keep a local copy of email attachments.

Sending Reports from SmartRoster Viewer

After clicking on the Email icon in the SmartRoster viewer the *Compose Message* dialog will be displayed. This dialog allows you to compose the message to send along with the report, and further limit who to send reports or bulk email, and how they are to receive it. The following illustrates:



1. Select the email recipients and whether by email or hardcopy

   ➢ Tick By Email to send them a message. This is only relevant if they have a valid email address.

   ➢ Tick By Post to generate a hardcopy report, which you can then send to them by mail. This applies for sending reports only (ignored for bulk emails).
   Use the Set All or Clear All buttons to set or clear, respectively, all off the above checkboxes in a single click.

   ➢ The address column will show the current email address recorded for a person or household.

   ➢ Type into the Filter box to further limit the names to those that match your filter text

2. Type in the subject in the space provided (using **field codes*** if needed).
3. Attach additional arbitrary attachments if required by clicking on the Add button next to the Attach: box (not necessary for the report you generated)
4. Type in an optional message in the space provided. This message (if any) will be attached to the email message to be sent to them. Use **field codes***

to included information specific to the person being addressed. You can send HTML messages by simply typing valid HTML code in here, or by loading an external web page by clicking on the "Load web page" button. As long as the text included the tags <HTML> and </HTML> then SmartRoster will treat it as a web page when sending.

5. Click "Attach vCalendar reminder" to attach to each each person's email a vCal format file which allows them to easily update their Outlook (or similar) calendar by opening the attachments – one for each date scheduled

6. Click Generate > Email

   ➢ SmartRoster will generate one email message for each person with the *By Email* column ticked, and it will open the **Email Queue** dialog where you can review the email messages generated, delete or modify them, and send them. If Auto Send is selected in the email options dialog, the messages will automatically start being sent.

7. OR Click Generate > Hardcopy

   ➢ SmartRoster will create a report in the SmartRoster Viewer, containing only schedules for those for whom *By Post* is ticked (not available for bulk emails). You can then just print of those reports for which hardcopy is required.

*** Field codes**

In either the subject or message of the Email dialog you can select Field Codes to insert which will be replaced by the actual value for each message created. When you click Generate a new email message will be created for each person you have selected in the Recipients dialog with "Email" column ticked. For each such message the field codes will be replaced by the actual value for that person. This provides you with a powerful method of providing feedback to your people about data relating to them, such as their addressing, absences, roles, events, or schedules.

<u>To enter field codes:</u>

First left-mouse-click into the subject or body at the place you want to insert the field code - you will see the cursor flashing at this point, called the insertion point.

Then right-mouse-click (click the right mouse button) and you will see a drop-down menu with the list of possible field codes. Selecting one of them will insert that field code into the text at the current insertion point.

Eg. if you place the field code "[Fullname]" anywhere in the subject line this will be replaced, in each email message generated, by the actual full name of the person receiving the message. if you place the field code "[Schedule]" anywhere in the body this will be replaced by the persons current schedule..

Possible field codes include:

PreferredName	Email	Roles
Surname	Age	Events
FullName	DOB	PersonType
Title	Sex	Active
Address	Notes	ScheduledCount
Town	FixedUsage	Schedule
Postcode	EnforcedBreak	SchedulePeriod
State	Absences	Organisation
Fixedphone	Associations	ReportTitle
Mobile	Groups	
Fax	Members	

Sending Bulk Email

You may send bulk emails including your own message and attachments to a list you select from individuals, households or groups in your SmartRoster file.

To do this select the **Email > Bulk email** menu option. This will bring up the "Select Recipients" dialog from which you select the individuals/households to whom you wish to send a message. You can also select specific roles and/or events, to send a message only to people in specific roles.

Click OK to display the Compose Message dialog (see above).

You can further remove individual entries by unticking the "By Email" check box in the recipients panel.

Now type in any details you wish in the Subject and Optional message fields exactly as you would as per sending a report from the SmartRoster viewer. Remember you can also attach files by either typing in their name/s (separated by semicolons) in the Attachment field, or clicking the Add… button.

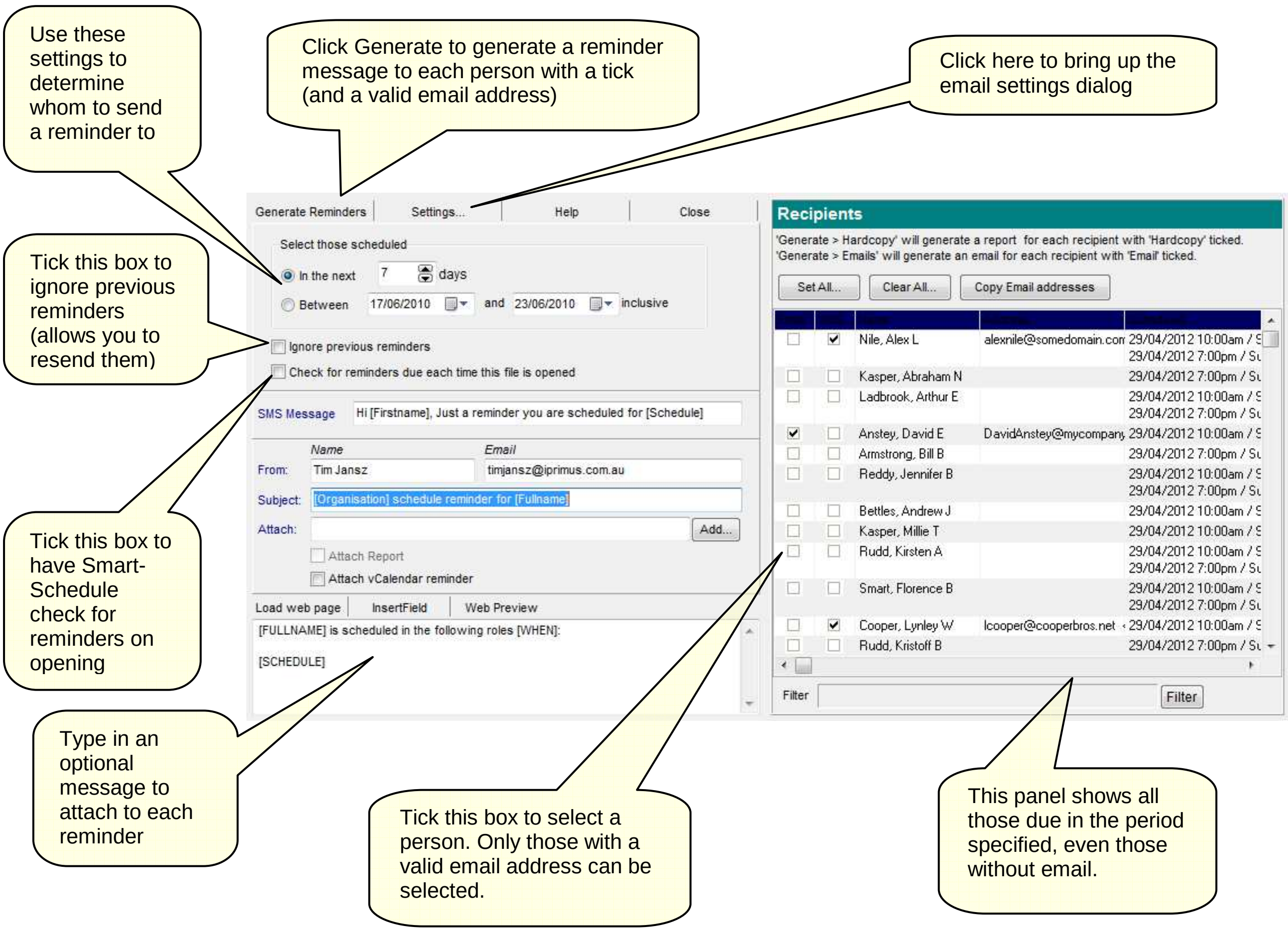
When you click **Generate > Emails** to generate the emails (replacing field codes as necessary) and dropping you in the SmartRoster Outbox where the messages can be sent

Sending Email Reminders

SmartRoster is able to automatically or manually (when you choose) send reminders to those people who have an email address.

To run the reminders module select the **Email > Reminders** menu.

The following window will display:



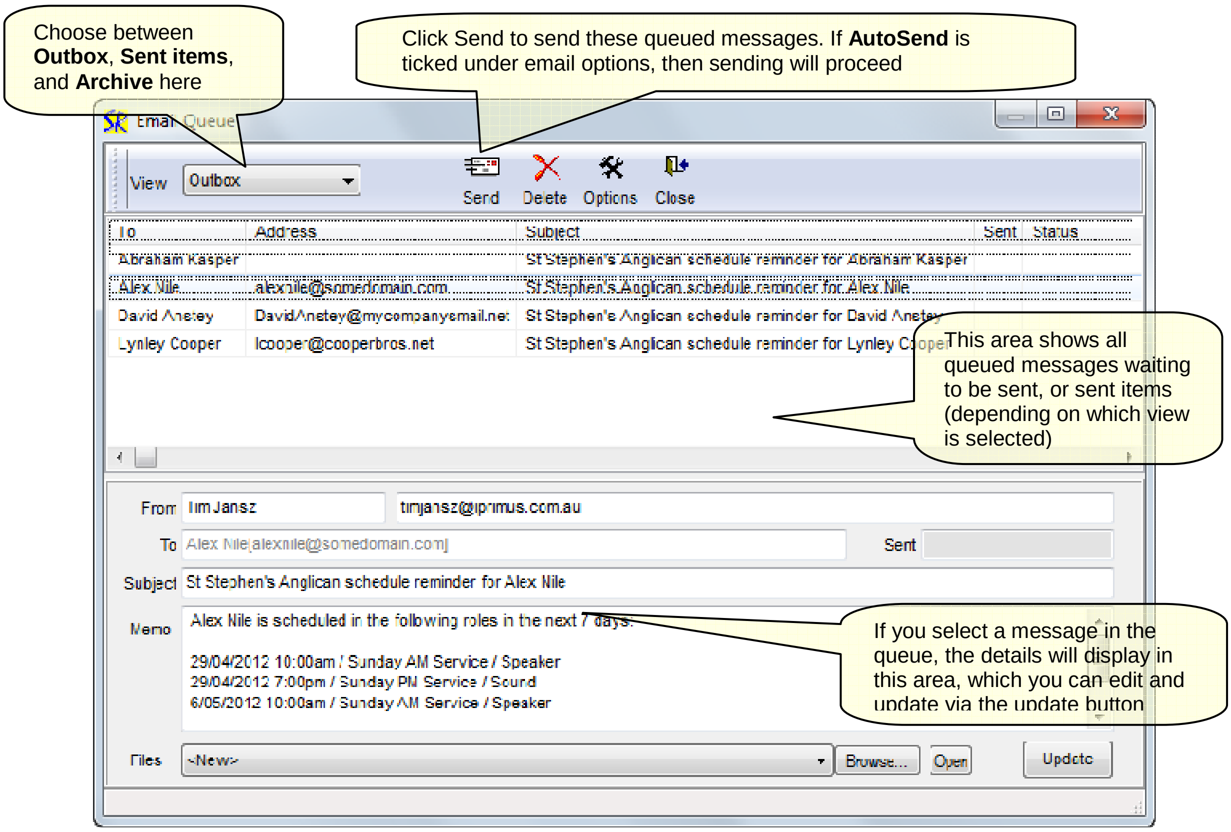
1. Choose either the number of days to look ahead, or the specific date range for determining whom to remind. The Recipients panel will automatically update with those due in that many days from now, or within the date range specified.
2. Tick the individuals to whom you wish to send a reminder. (You cannot tick those without an email. These people are included in the list for your information only)
3. Click **Generate > Emails** to generate the email reminder messages. SmartRoster will also start sending the reminders if AutoSend is ticked under your email options.

Automatic Reminders

By ticking the "Check for reminders…" option, SmartRoster will check for any reminders that are due in the number of days specified each time you open this SmartRoster file. If reminders are due then this dialog with be displayed and you can then click **Generate > Emails** to send the reminders or **Close** if you do not want to do so at that time.

The Email Queue

Once you send messages, either as bulk email, from within the Report Viewer, or as reminders, they will all appear in the Outbox of the Email Queue window. To access the Email Queue at other times select menu **Email > View Email Queue.**



If you have specified "Auto Send" in the email options dialog, then SmartRoster will automatically start sending the messages. Otherwise you can revise the messages by selecting them from the list and viewing the message in the edit panel below. You can alter any details of a message before sending by making edits in this panel and clicking the "Update" button.

Right-click on any message in the list to access a popup menu of possible options. Options include:

Edit in Notepad	Open the message (which is a text file) in Notepad
Re-send	If this is in the Sent Items area, you can re-send a message by selecting this menu option. This will move the message back into the Outbox where it is queued for sending. You can edit the message before actually sending it again.
Print	To print the text file on a connected printer
Delete	Delete the message (and any attachments it may have)
Archive	Move all selected messages to the archive area

All messages that are sent successfully are moved into the Sent Items area, which you can select from the View dropdown box (See above).

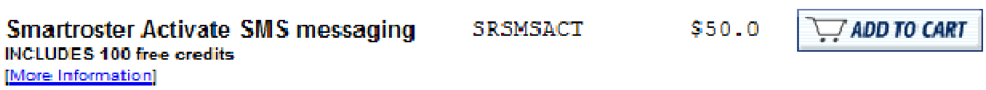
The folder on your PC where these messages are stored is defined in the Email Options dialog. You should set this before using any of these features. You can specify any location on your PC or even on a Network.

Sending SMS reminders

Setting up SMS reminders

To setup SmartRoster to be able to send SMS reminders carefully follow the following instructions:

1. Purchase a Smartroster SMS activation from our web site at www.smartroster.net/purchase.htm (once-only activation)



(If your support is **not** current then you will need to purchase support as well)

Activation includes 100 free SMS credits to get you started. Additional credits are available for as little as 10c per text.

2. Register the cell/mobile phone number from which reminders will originate. To your volunteers it will appear that reminders are coming from this number. Their replies will also go to this number.

To do this, email us your cell/mobile phone number, after purchasing the activation.

Note that this number will NOT be charged for SMS messages sent by SmartRoster as originating from it. You need to pre-purchase SMS credits (see below).

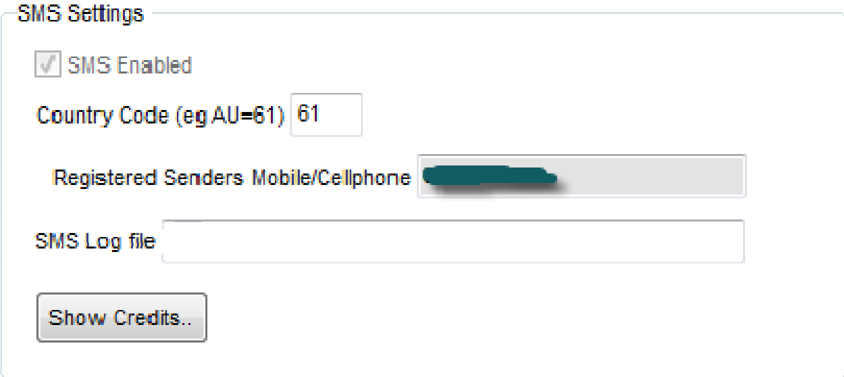
You will receive an activation code to this cell/mobile phone. *It is critical that you immediately forward this code* to us at sales@smartroster.net. You cannot send SMS reminders without registering a mobile/cell phone number in this way.

3. Re-register your smartroster installation with your new registration key (which you will receive via email) – just drop the new license file onto your desktop before starting SmartRoster and enter your details into the registration dialog and click OK.

4. Purchase SMS credits from our web site, currently from $40 for 200 credits, to $100 for 1000 credits (prices subject to change). Note 100 credits are included with your activation.

5. Configure SmartRoster for SMS

Select menu option **File** > **Options** and the **Other** tab. You will see the SMS settings:

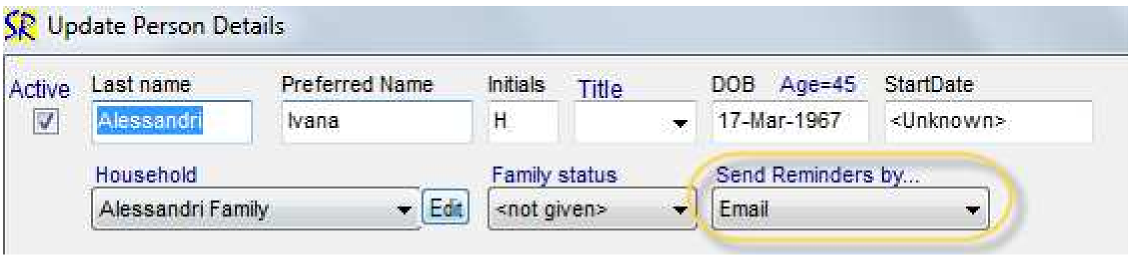


You should set the Country code to your default country code. This will be prefixed to your volunteers cell/mobile phone numbers if they are not stored with the country code already.

NB: You can see how many credits you have available at any time by clicking on "Show Credits".

6. Nominate how each of your volunteers will receive reminders.

Open a volunteers' record (double click the person in People panel).



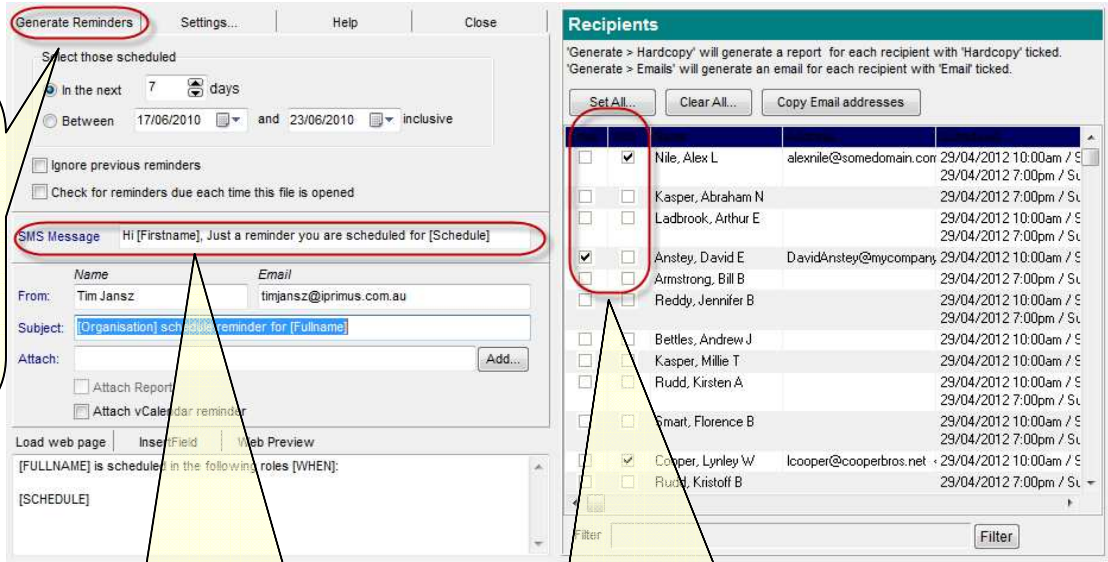
You will see the new field "Send reminders by'. You can select "Email" ,"SMS", "Both Email and SMS", or "No reminders, thanks". Click OK to save the change.

Of course, make sure your volunteers who choose to receive SMS reminders have a mobile phone number specified!

Now you are ready to send SMS Reminders!

Using SMS reminders

To send SMS reminders simply select the **Email > Reminders** menu as you would for sending Email reminders. In addition you will now also see the following:



click 'Generate Reminders' to generate both email (if any ticked) and SMS (ditto) reminders as required.

This is the SMS reminder message that will be sent and is customisable (fields codes are replaced of course for each individual message)

SMS and Email columns in the Recipients grid reflect how your volunteers want to receive reminders. You can override that preference here if needed. This defaults to the options set in 6. above "Nominate how each of your volunteers will receive reminders"

CHAPTER 8
Security

Security

Chapter Contents

This chapter will show you how to setup login-based security for your Smartroster users which implements levels of authority and allows users to edit and access relevant data while preventing alteration to data or schedules to which they are not authorised. This is great for allowing Role or Role-group coordinators or Event coordinators to create their own schedules while preserving the integrity of data outside those areas.

Login Authentication

Smartroster can be run with or without the requirement for login authentication.

Login authentication is turned off by default. While security is off anyone who has access to the file will be able to turn it on and create logins. Once it is on then only a System Administrator (SysAdmin) can add, delete, or change logins.

Limitations

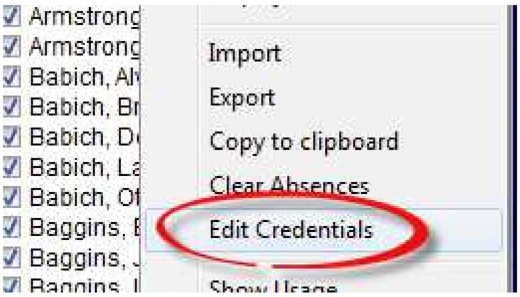
Login authentication is not available in SmartrosterLite.

To turn ON login authentication

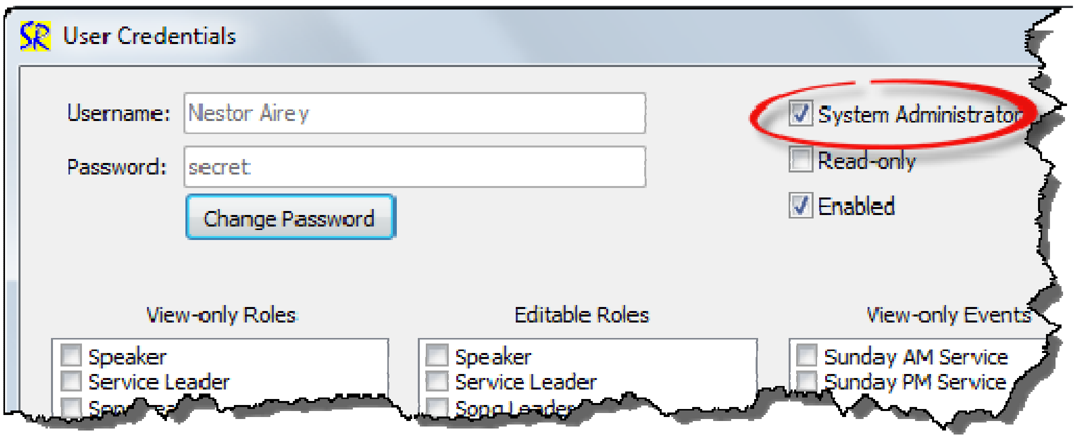
Select menu File > Options, and tick the checkbox as shown below:

Then click OK to save.

Now you must create at least 1 system administrator. Right click on the person in the People panel as shown. Select "Edit Credentials"



You will then see the User Credentials dialog as show:



Tick "System Administrator". Then click "Change Password" to create a password.

> **Hint!**
> It is important that any person who is given user credentials to enable them to login to the Smartroster database also have a valid email address. This email address can be used to recover a forgotten password.

Click Save to save your changes. Now you have created your first system administrator ("SysAdmin" for short).

Now save your datafile (File > Save or click on the save icon on the toolbar).

From now on this Smartroster datafile will require a user login to open and edit the data.

User Credentials

The same dialog is used to define all login users for your system. This defines exactly what a user can and cannot do with the data.

System Administrator (SysAdmin)

This login user (can be more than one) has unrestricted access to all the data in the file as well access to changing login user credentials.

In general, any user who is NOT a system administrator cannot edit details of any Event regardless of the permission granted below. They will be able to adjust details of Roles to which they have permission to edit but will NOT be able to create a new Role nor remove any existing Role. To do this they will need to ask a SysAdmin. Also they cannot in general edit the Person details except for those persons that are role members for Roles they are allowed to edit.

The main reason for creating login accounts which are not SysAdmin is to allow them to create a schedule for a generally restricted range or roles or even a single role, and a restricted range of Events or even a single event, without inadvertently or accidentally changing data that may affect other users of SmartRoster (for that database).

Read-only

Tick "Read-only" to make a login user read-only. They will be limited in what they can see by the other elements of the User Credentials dialog, but under no circumstances will they be able to make or save changes to anything in the Smartroster database.

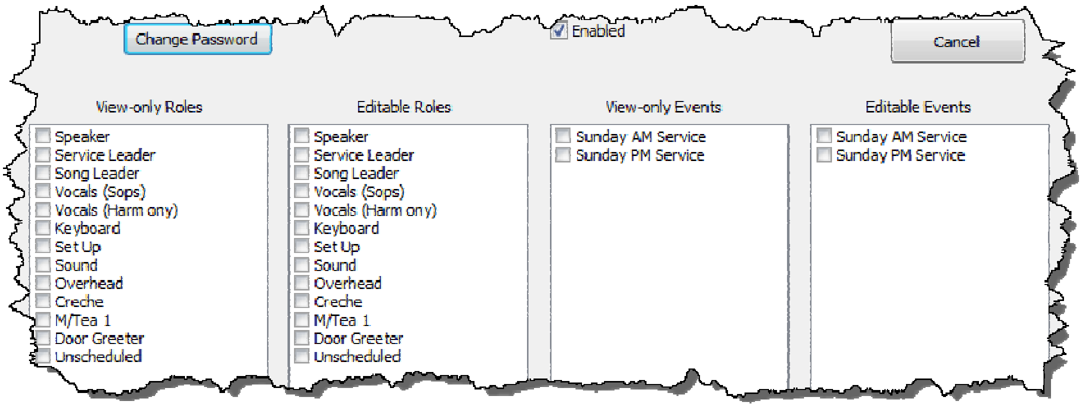
Enabled

Tick "enabled" to enable this user login. The SysAdmin can use this to temporarily disable a particular user login without losing the user credentials.

Change Password

Click on the "Change Password" button to create or change a password for the user.

Event and Role restrictions



Finally you can restrict what a login user can see and edit by role and event. Typically a user may want to schedule only a subset of Roles but take into account the personnel absences and association preferences already entered. In this case you can make all roles viewable but restrict which roles they can edit. You can also restrict which events can be viewed and which edited.

(See note above under SysAdmin for further restrictions applied to NON SysAdmins).

A logged-in user will also only be able to edit the personal details for persons who are members or role which they are able to edit.

The SysAdmin can of course view and edit any details.

Saving the User Credentials

Once you have created this template save it by clicking "Save". You can at this point create more user credentials for all the other users who will be logged into the Smartroster database. You can come back later if you wish to finish creating user credentials. You can also edit user credentials at any time if you are logged in as a SysAdmin. Don't forget to save all your changes with File > Save or clicking on the Save icon on the toolbar.

Guest Credentials

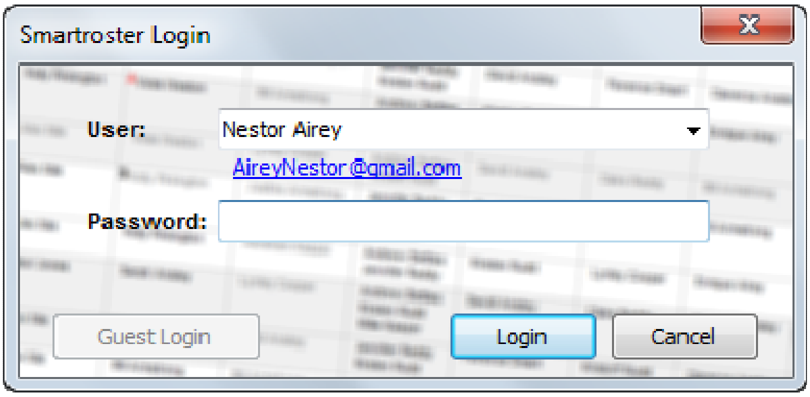
You can define a set of credentials to be active if a person clicks on "Guest Login" in the main login dialog instead of entered a username/password.

To create Guest credentials select File > Options and click on the "Guest Credentials" button (only SysAdmin can do this of course). Set the credentials as you would for any other user. Click save to save these credentials (and File > Save to update the database).

Once Guest Credentials have been created by the SysAdmin, the "Guest Login" button will be active. If this is clicked then the person will login as "Guest" and will be able to see and do whatever is permitted by the guest credentials.

Logging into Smartroster

When you start Smartroster after setting up Login Authentication you will see the following dialog



Type in your name or select from the drop-down box next to "User". After selecting a user, you will see the users email below the box as shown:

Click on the email address to have the password for that user emailed to them in case it is forgotten.

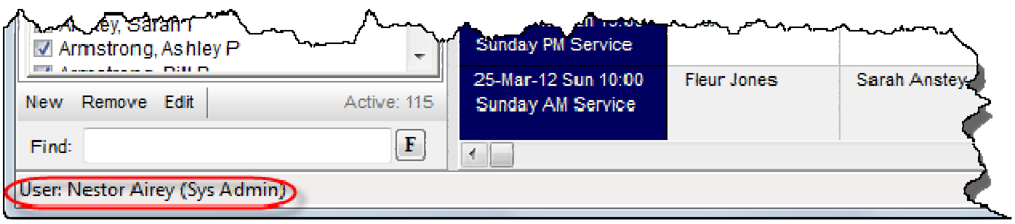
Now enter the Password and click Login. If it is incorrect you will have to option to try again.

If Guest credentials have been created by the SysAdmin, then the "Guest Login" button will be active. If this is clicked then the person will login as "Guest" .

If you click Cancel then Smartroster will close the current database and the User will be left in a plain empty "untitled" Smartroster application with no ability to interact with the data in the datafile.

Working with Smartroster after logon.

Once you have logged in you will see your login userid in the bottom left of the main Smartroster dialog:



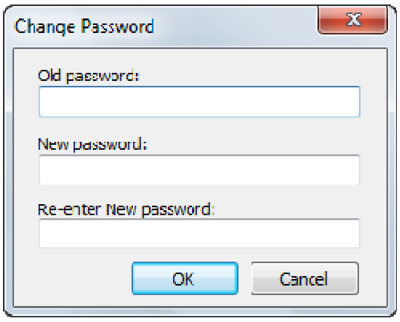
Now you can work with Smartroster as normal.

If you have restrictions on the Events or Roles you can edit or view then these will be evident from what you can see in the various Smartroster views.

If you are using Smartroster and think that you should be able to edit or view something then in the first instance talk to your SysAdmin and request appropriate access.

If you are a SysAdmin and think that access you have defined it being incorrectly applied than contact Smartroster support via the “Help > Email Tech-support” menu and we will try to assist you in a timely manner.

Changing your password



To change your password after logging in, select “Change Password” from the File menu. You will see the change password dialog as show:

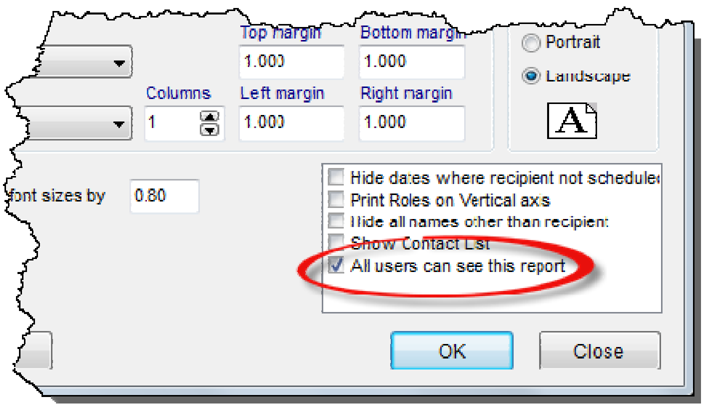
Enter your old password followed by a new password and re-enter the new password to confirm and click OK.

If you are logged in as Guest OR you are a read-only user then you cannot change the password. In the latter case you will need to request the SysAdmin to change your password for you.

Reports

After login authentication is activated, reports that a user creates can be made only visible to that user OR are visible to any user.

This is set in the Report Parameters dialog:



If the box is ticked than all users will see the report definition. If not ticked then it will only be available to the person who was logged in when the report was created.

If you are logged in as Guest or are a read-only user then you cannot save new report definitions.

CHAPTER 9

Reference

Explaining Menus, the Toolbar and Options

Chapter Contents

The SmartRoster menu and toolbar are the main ways in which you interact with the program. This chapter explains what each item means, and provides a full description of each option under the File > Options menu.

The SmartRoster Menu

File

		Page Ref.
New	Create a new SmartRoster file	29
Open	Open an existing SmartRoster file	28
Close	Close the currently open SmartRoster file	
Save	Save any changes to the open file. If it has never been saved, you'll need to provide a filename	
Save As	Save the open file to a new filename	
Open from web	Open a shared file from your WebShare repository	21
Save to web	Save a file to your WebShare repository for sharing with others in your organisation	21
Reopen from web	Re-open for update a file previously opened from WebShare, currently open in read-only mode	21
Options	Set SmartRoster Options. You can • Set your organization's name and view your current licensing details • Configure open and save settings • Configure Email settings • Configure auto-import • Configure AutoFill • Configure WebShare • Miscellaneous other settings	
Backup	Backup to the current SmartRoster file to removable media	20
Revert to saved	Undo all changes since the last **file > save**	
Exit	Exit SmartRoster	

View

Toolbar	Turn on or off the toolbar	
Status Bar	Turn on or off the status bar (the bottom line of the main window)	
View People	Toggle the People panel display	14
View Events	Toggle the Events panel display	15
View Roles	Toggle the Roles panel display	16
View Schedules	Toggle the Schedules panel display	17
New File Wizard	Display the New File wizard (help screens)	29

Events

New	Create a new event	61
Edit	Edit the currently selected event	
Remove	Delete the currently selected event	

People

		Page Ref.
New	Create a new Person	42
Edit	Edit the Person that is currently selected	
Remove	Delete the Person that is currently selected	
Show Individuals	Change the People panel to display only individuals	
Show Households	Change the People panel to display only households	
Show Groups	Change the People panel to display only groups	
Display As	Change the tabs that appear on the people panel to single letter, three letter, household, or no tabs	
Import	Import people from a tab-delimited format file or from another SmartRoster file	50
Export	Export people in tab-delimited file format	52
Show[Hide] Usage	Hides (shows) the number of times each person is used in the current Schedules	80
Clear Absences	Use this command to clear multiple absence records at once	

Roles

New	Create a new role	57
Remove	Delete the role that is currently selected	
Order Roles…	Move the current role left or right	57
Pattern	Restrict the dates for which the selected role is required over the dates for which the roles Events are required. The role will normally be required for each event in its **Applies to events…** list. Use this menu to remove specific dates/times for this role (you cannot ADD dates)	
Display as…	You can display the roles as a list down the left of the role panel or as tabs along the top	57
Role Members…		
New Member	Add a new Role Member	58
Edit	Edit the currently selected role members	
Remove	Delete the currently selected role members	
Copy	Copy the currently selected role members to the clopboard	
List view	Change the Role Members to list view style	
Detail view	Change the Role Members to Detail view style	
Name Format	Change the format of names displayed in the Role Members list, and Schedules grid	
Show[Hide] Usage	Shows (or hides) the number of times each person is scheduled in the role	80
Show all members	By default the Role members list only shows those who are available for the active events in the events panel. This causes all members to be displayed.	
Role Groups	Set up role groups	61
Restrictions	Set up global restrictions	68

Schedule

Auto fill	Run the Automatic Scheduler	77
Undo	Undo the last auto fill (revert to the previous schedule)	
Clear…	Option to clear all cells that are not locked in the current scheduling period, all cells before a certain date, or all cells unconditionally	
Set AutoFill Order	Set the order in which AutoFill will fill role schedules. This order can be different to the visible order.	
Export	Export the schedules as appears in the Schedules panel to tab delimited or html formats.	
Show vacant slots	Turns on or off the display of vacant slots in the schedule panel	
Post AutoFill review	Go to the **Post AutoFill Review** help page indicated	80

Report

Schedules	Display the Report Parameters entry form to Generate various schedule reports	90
Address book	Generate the address book reports	93
Labels	Generate Label reports	94
Inventory	Generate Inventory reports	92
Analysis	Generate Analysis reports	94

Email

Reminders	Send email reminders	104
Bulk email	Send ad hoc messages and attachments to a list you select from your people	104
View Email Queue	Manage email messages in the Outbox or review sent messages in Sent Items	105
Options	Set email settings	100

The SmartRoster Toolbar

New	Create a new SmartRoster file
Open	Open an existing SmartRoster file
Save	Save any changes to the open file. If it has never been saved, you'll need to provide a filename
People	Open/close (toggle) the People panel display
Events	Toggle the Events panel display
Roles	Toggle the Roles panel display
Schedules	Toggle the Schedules panel display
Autofill	Run the Automatic Scheduler
Clear	Clear all cells. Provides a small dialog asking you which type of cells to clear
Undo	Undo the last auto fill (revert to the previous schedule)
Report	Display the Report Parameters entry form to Generate various reports
Email	Send bulk emails to specified lists
Options	Display the settings dialog

Date-time format strings

Date-Time Format Strings specify the formatting of date-time values when they are converted to strings. Date Time Format Strings are used in reports and also for setting the format of date/time in the main Scheduled Grid (by selecting menu Schedules > Date format).

Date Time Format Strings are composed from specifiers that represent values to be inserted into the formatted string. Some specifiers (such as "d"), simply format numbers or strings. Other specifiers (such as "/") refer to locale-specific strings from global variables.

In the following table, specifiers are given in lower case. Case is ignored in formats, except for the "am/pm" and "a/p" specifiers.

Specifier	Displays
c	Displays the date using the format given by the ShortDateFormat global variable, followed by the time using the format given by the LongTimeFormat global variable. The time is not displayed if the date-time value indicates midnight precisely.
d	Displays the day as a number without a leading zero (1-31).
dd	Displays the day as a number with a leading zero (01-31).
ddd	Displays the day as an abbreviation (Sun-Sat) using the strings given by the ShortDayNames global variable.
dddd	Displays the day as a full name (Sunday-Saturday) using the strings given by the LongDayNames global variable.
ddddd	Displays the date using the format given by the ShortDateFormat global variable.
dddddd	Displays the date using the format given by the LongDateFormat global variable.
e	Displays the year in the current period/era as a number without a leading zero (Japanese, Korean and Taiwanese locales only).
ee	Displays the year in the current period/era as a number with a leading zero (Japanese, Korean and Taiwanese locales only).
g	Displays the period/era as an abbreviation (Japanese and Taiwanese locales only).
gg	Displays the period/era as a full name. (Japanese and Taiwanese locales only).
m	Displays the month as a number without a leading zero (1-12). If the m specifier immediately follows an h or hh specifier, the minute rather than the month is displayed.
mm	Displays the month as a number with a leading zero (01-12). If the mm specifier immediately follows an h or hh specifier, the minute rather than the month is displayed.
mmm	Displays the month as an abbreviation (Jan-Dec) using the strings given by the ShortMonthNames global variable.
mmmm	Displays the month as a full name (January-December) using the strings given by the LongMonthNames global variable.
yy	Displays the year as a two-digit number (00-99).
yyyy	Displays the year as a four-digit number (0000-9999).
h	Displays the hour without a leading zero (0-23).
hh	Displays the hour with a leading zero (00-23).

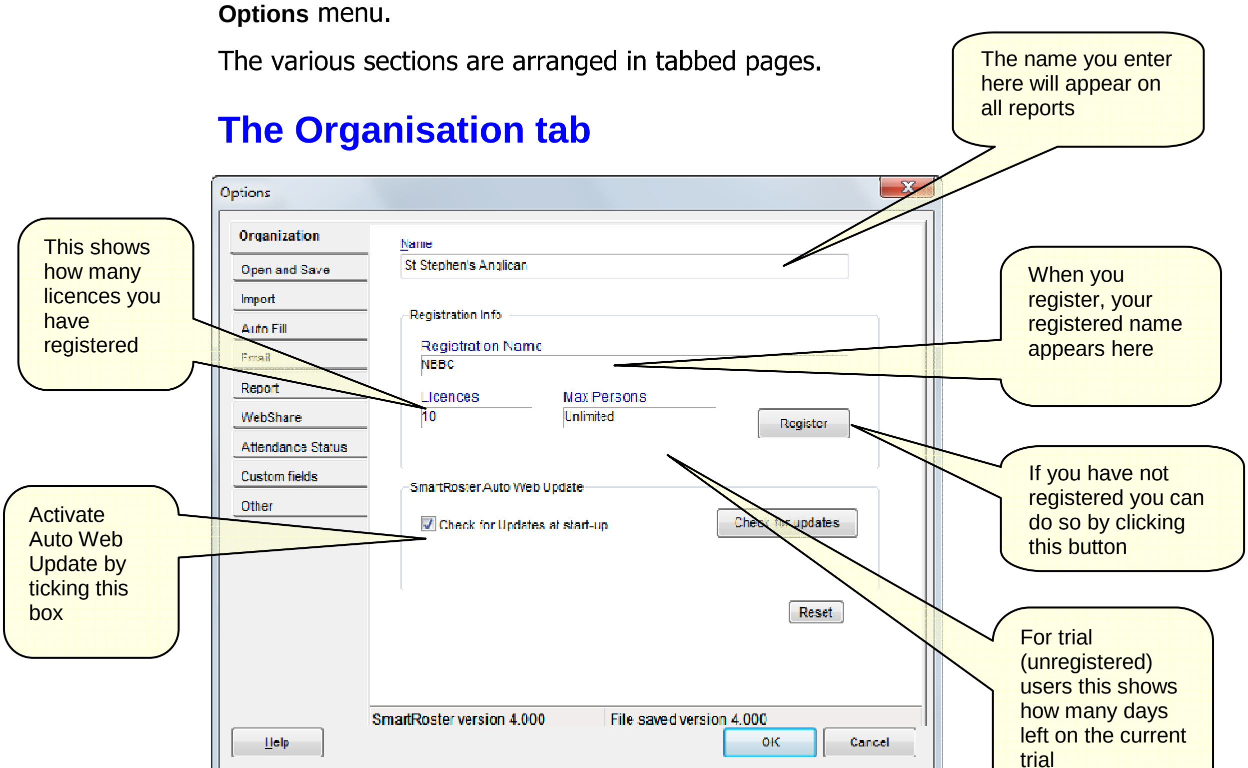
n	Displays the minute without a leading zero (0-59).
nn	Displays the minute with a leading zero (00-59).
s	Displays the second without a leading zero (0-59).
ss	Displays the second with a leading zero (00-59).
z	Displays the millisecond without a leading zero (0-999).
zzz	Displays the millisecond with a leading zero (000-999).
t	Displays the time using the format given by the ShortTimeFormat global variable.
tt	Displays the time using the format given by the LongTimeFormat global variable.
am/pm	Uses the 12-hour clock for the preceding h or hh specifier, and displays 'am' for any hour before noon, and 'pm' for any hour after noon. The am/pm specifier can use lower, upper, or mixed case, and the result is displayed accordingly.
a/p	Uses the 12-hour clock for the preceding h or hh specifier, and displays 'a' for any hour before noon, and 'p' for any hour after noon. The a/p specifier can use lower, upper, or mixed case, and the result is displayed accordingly.
ampm	Uses the 12-hour clock for the preceding h or hh specifier, and displays the contents of the TimeAMString global variable for any hour before noon, and the contents of the TimePMString global variable for any hour after noon.
/	Displays the date separator character given by the DateSeparator global variable.
:	Displays the time separator character given by the TimeSeparator global variable.
'xx'/"xx"	Characters enclosed in single or double quotes are displayed as-is, and do not affect formatting.

SmartRoster Options

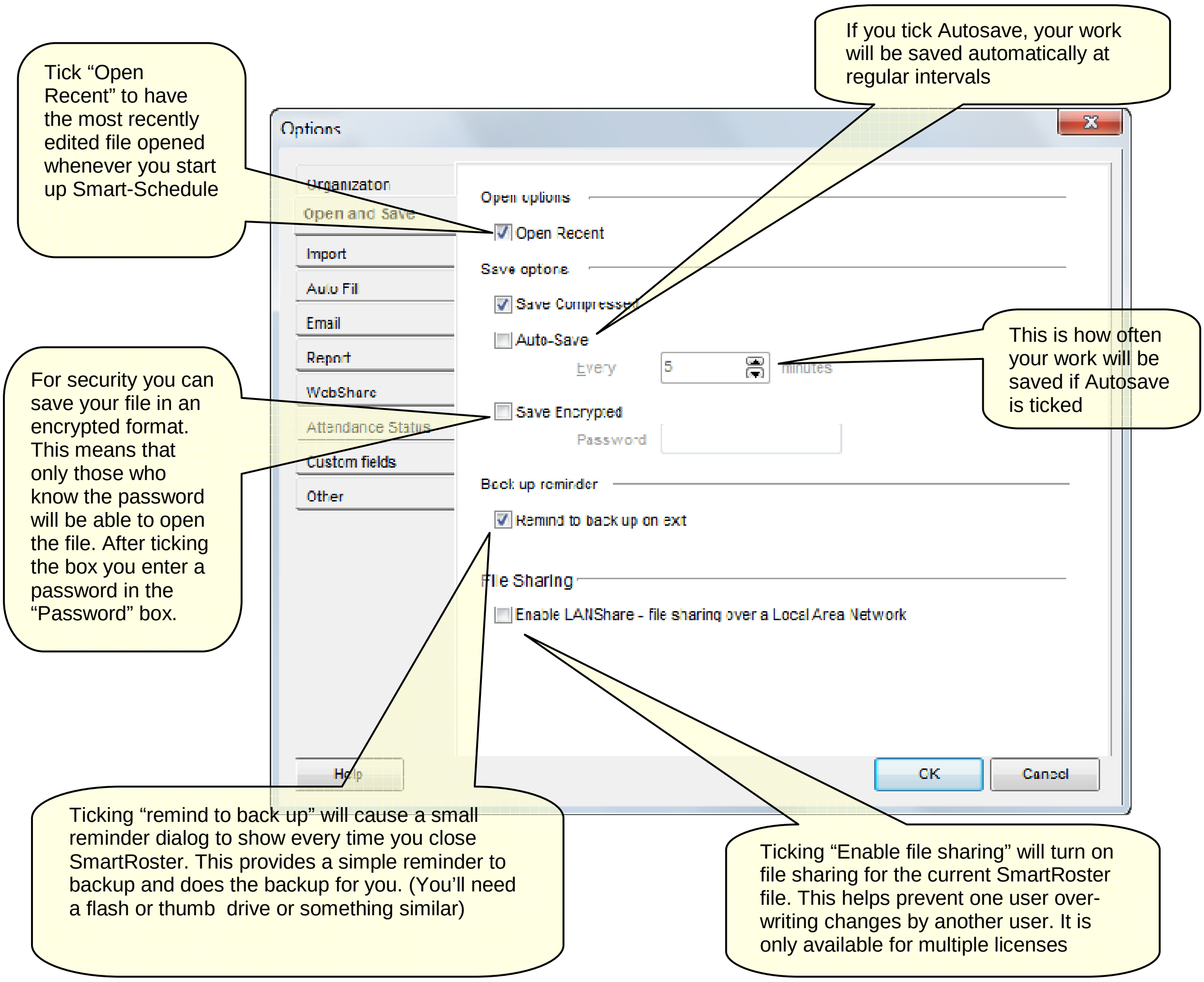
You can set any of the general SmartRoster Options by selecting the **File > Options** menu.

The various sections are arranged in tabbed pages.

The Organisation tab



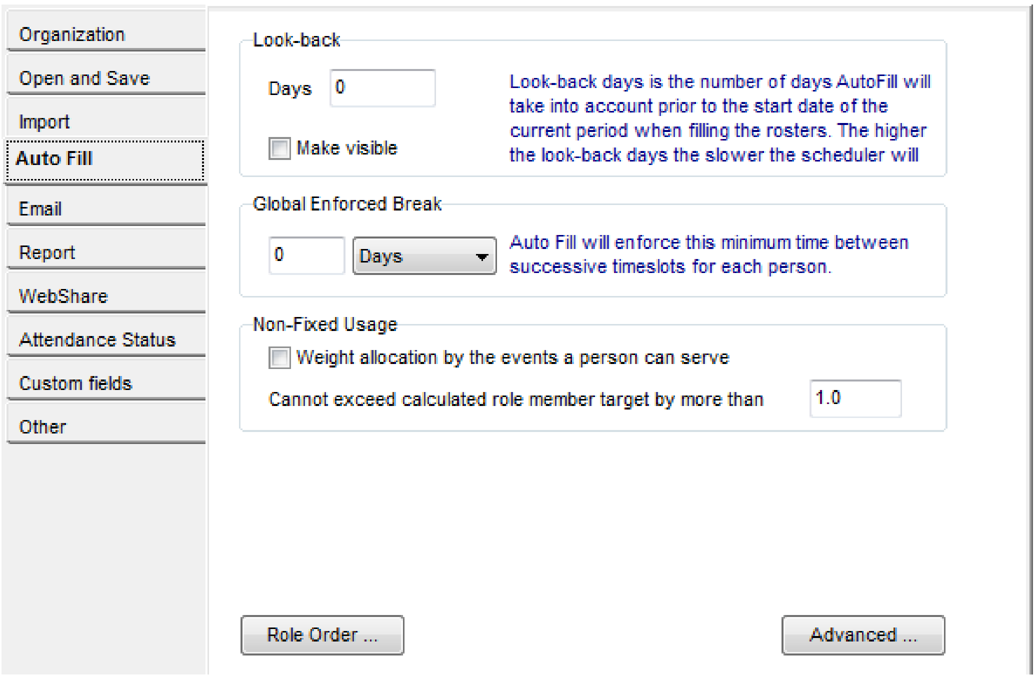
The Open and Save tab



The Import tab

The import tab is where you specify a file to be automatically imported. See pages 50 and 53 for further details.

The Auto Fill tab



Look-back days

The Look-back period is the days that the automatic scheduler will consider prior to the start date of the scheduling period. The automatic scheduler will take prior allocations into account when allocating roles for the current period.

Enter the number of prior days to consider in the Look-back Days edit box. You can decide whether or not to make these visible in the Schedules panel by ticking the Make Visible check box. Note: Even if they are visible, the automatic scheduler will not allocate look-back days.

Global Enforced Break

Entering a number in Global Enforced Break will cause the automatic scheduler to enforce a non-scheduled break of the specified minutes, hours, or days between all timeslots for each person in the schedule. To specify individual breaks see page 44.

Non-Usage Target settings

<u>Weight allocation by the events a person can serve.</u>

When AutoFill starts building schedules it first must calculate a target for all role members who do not have a usage target specified. AutoFill can do this in two ways.

If you TICK this option, then for each active role/event pair it finds every role member that can service in that event and evenly allocates the un-allocated timeslots between them. This means that people who are available for more events will tend to have a higher target overall.

If you UN-tick this option AutoFill calculates the TOTAL unscheduled slots across ALL events for each role and allocates them evenly between all role members who do not have a usage target specified. Then for each of these role members it re-allocates their timeslots between each of the events for which they are available. This option generates targets that are NOT weighted by the events a role member is available to serve.

Some users will consider that it is fairer to give more time to those people who are more available or less restricted in events they can serve. Other users will want to have every person scheduled about the same number of times even if they are more or less available.

Cannot exceed calculated role member target by more than...

AutoFill will generally NOT exceed usage targets (those explicitly specified). What about the targets that are generated for non-fixed role members? This option allows you to indicate the tolerance for exceeding target for non-fixed members.

Make this a large number to effectively say "I don't care how many times you use a non-fixed role member - just fill as many timeslots as possible". Setting a small number (say 0 or 1) will possibly increase the number of unfilled slots, but at least you know that no person will be scheduled much more than any other non-fixed role member.

For a description of the "Role Order" and" Advanced..." settings, see pages 78, 78.

The Email tab

Before you can use the email facility you must enter at least the Email account and the Host name. See page 100 for a list of email settings.

The Report tab

This tab has only one option:

☐ **Use Acrobat Reader as report viewer**

If you tick this box, SmartRoster will use the Adobe's Acrobat Reader product to preview and print reports.

☐ **Enable Report Uploading via FTP**

If you tick this box, SmartRoster will allow you to upload any report from within the SmartRoster report viewer to a web site in pdf format. This is only useful if you have a web site (such as your Church or organisation's web site) and have FTP user and password to access your web site. If you are not sure then contact your Church or organisation's webmaster, or contact your web site's Hosting ISP and request your FTP user id and password.

Web address: your FTP server name, e.g: www.MyChurch.org

User ID: the FTP logon user ID provided by your ISP or webmaster

Password: the FTP logon password provided by your ISP or webmaster

Port: defaults to 21 but you can specify any port to use

Server path: the server path to which you will be initially connected. Your files will be uploaded into this path. Eg: /httpdocs/schedule

The "Attendance status" tab

Enter your attendance status flags in the list box provided, one per line. See page 94.

The "Custom Fields" tab

Create and use custom personnel fields. You can now create and use your own fields for personnel. These fields allow you to store any kind of textual or numeric information that is not possible by other methods. See page 53 for further help on using custom fields.

The "Other" tab

This tab has the following options:

☐ **Enforce associations when manually scheduling**

Tick this option to enable this feature. If ticked then when you manually schedule a person who has keep-together associations with another person or persons then these other people will also be automatically scheduled in the same event occurrence.

☐ **Show Welcome dialog on start up.**

The Welcome dialog shows every time you start SmartRoster. If you do not want it to show just remove the tick from the box.

☑ **Show “New File” wizard on new files**

The New File wizard shows whenever you create a new file. If you cancel it you can re-activate it at any time by selecting the "Help | Setting up a new file" menu.

☑ **Show “New File” wizard on new files**

Untick this (ticked is the default) to go back to the Windows 2000/NT look-and-feel

Costing

If you have purchased an “Unlimited Persons” or Commercial license, then this option is available. By enabling costing, you will be able to define various costs per person, role, event, role-member and then report on these using the Analysis reports.

Default rate: will apply to any person who does not have a rate set and where a rate cannot be found from related role or event.