

ServePoint Team-Admin Manual

Welcome to ServePoint!

This manual is intended for team-admins. Team-admins are the users responsible for maintaining and scheduling their teams in servepoint.

Accessing ServePoint

To access ServePoint, you will use the following link: *organization_name*.servepoint.net (where *organization_name* is the name of your organization.) For example: firstchurch.servepoint.net

Your username and password should have been emailed to you in a welcome message from servepoint.

Tutorials

To quickly familiarize yourself with servepoint, we recommend watching the tutorial videos. Start with the "Tutorial for all users" to get an idea of what the average user will experience. Next watch the "Tutorial for team admins" to find out what a team admin will experience.

This manual won't go into all of the basics covered in the tutorial videos, so be sure to watch them first.

Quick-Start

After watching the tutorial videos, here are the main steps to getting started.

Setup your team

Click on your team from the menu on the left, and add all of the positions for your team (e.g. Front door greeter, Café greeter, etc...)

Add sub-teams, if you want a way to group people - For example, if you have people that only want to serve at a certain service, you can setup sub-teams called 9AM and 11AM. This step is not required, but it may be helpful.

Add your team members. New team members must be added as users to ServePoint before you can add them to your team. So if you don't see them in the member pick-list, go to the Users menu and add them there first.

Assign each team member to positions and sub-teams by editing their team member record, and choosing their positions and sub-teams.

If a team member needs to maintain your team, schedule, add resources or send messages, then you will need to check the "Admin" box in their team member record. Most admins will need to add users and events, so you probably want to check those boxes as well.

Schedule your team

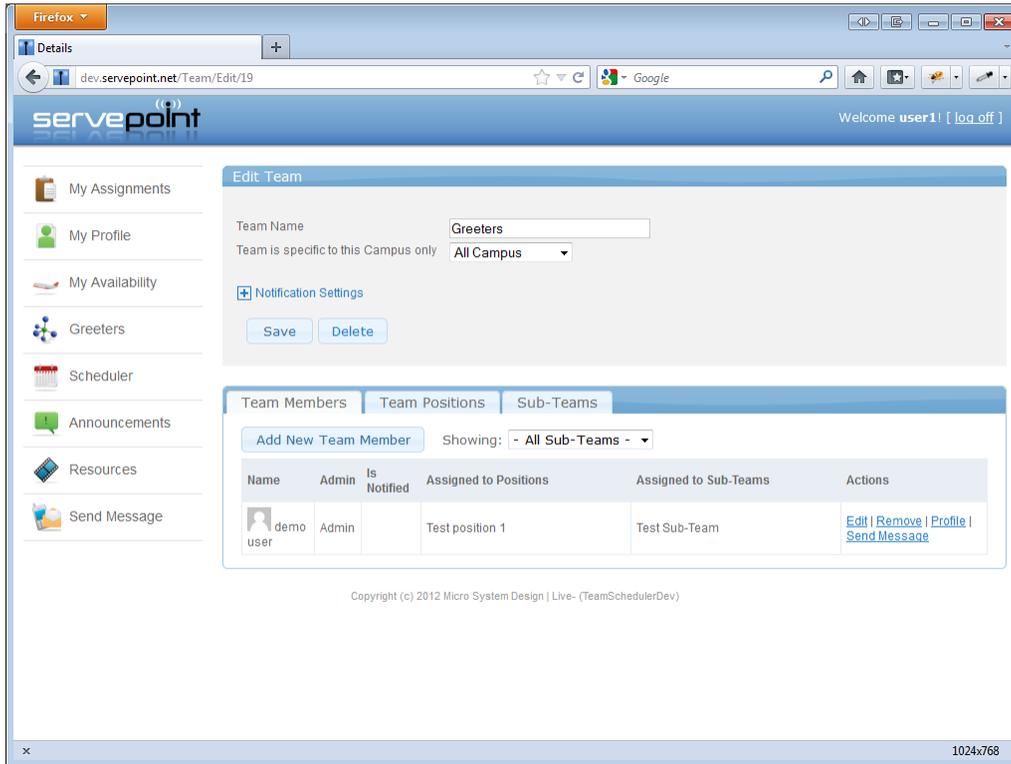
Click the "Scheduler" link on the left, choose your team, your campus and the dates you are wanting to schedule, then begin scheduling. Once your schedule is complete, change the statuses to "Active", then save, so the assignments will be sent out to your team.

Setting up your team

Your first step is setting up your team with members, positions, and other team-specific settings. You should see your team listed in the main menu on the left.

If you don't see your team listed, then it has not been created yet by your volunteer coordinator, or whoever has been given "super-admin" access to servepoint.

Click on your team from the menu on the left, and you will see your team details. Here is an example of a new "Greeters" team:



The screenshot shows a web browser window displaying the 'servepoint' application. The page title is 'Edit Team'. The team name is 'Greeters' and it is set to be 'All Campus'. There are 'Save' and 'Delete' buttons. Below this is a 'Notification Settings' link. The bottom section has three tabs: 'Team Members', 'Team Positions', and 'Sub-Teams'. The 'Sub-Teams' tab is active, showing a table with one row for 'demo user' assigned to 'Test position 1' and 'Test Sub-Team'. The table has columns for Name, Admin, Is Notified, Assigned to Positions, Assigned to Sub-Teams, and Actions. The Actions column contains links for Edit, Remove, Profile, and Send Message.

Name	Admin	Is Notified	Assigned to Positions	Assigned to Sub-Teams	Actions
demo user	Admin		Test position 1	Test Sub-Team	Edit Remove Profile Send Message

The top part of the screen lets you change team preferences, including when notifications are sent out. By default *new assignment notifications* are sent out up to 30 days in advance, *unconfirmed assignment reminders* are sent out 14 days in advance, and then a *final reminder* is sent out 1 day before the assignment. Click the Notification Settings link to change these defaults.

The bottom part of the screen shows three tabs for your team members, positions, and sub-teams.

Team Positions

Start by clicking the Team Positions tab, then hit "Add New Position" button.

Add Position
✕

Name	Front Door Greeter
Description/Comments	Greets our guests as they first enter the building
Requirements	Friendly, Out-going
Min # people needed	2
Max # people needed	2

OK
Cancel

In this example, we added a “Front Door Greeter” position, and we need 2 people for this position. By entering 2 for the Min # of people, when we start scheduling, we will be able to choose multiple people for that position. If entered 1, then we would only be able to choose one person. Continue adding all of your team positions, such as Auditorium Greeters, Café greeters, etc...

Sub-Teams

Sub-teams are not necessary, but they allow you to group your team members together for any purpose. For example, if you have a big team, like Worship Team, you may want to group your members into two sub-teams – Band and Vocals. This may help for communication purposes; say you want to email just the Vocals, etc...

Or, if you have multiple church services, and your team members want to specify a preference as to what service they prefer to serve at, you could create sub-teams for each service. When you schedule your team, and you are picking members for positions, you will be able to see what sub-team they are on, which can help you know which service to schedule them for.

One final example, is if you have multiple campuses, and you have one big team that serves across all campuses, the sub-teams can help you designate that certain people prefer to serve at a particular campus.

To add a sub-team, hit the “Add New Sub-Team” button:

Add Sub-Team
✕

Sub-Team Name	
<small>If you would like to see this subteam next to the team member's name while scheduling, Enter an abbreviation for this subteam (max 3 characters):</small>	
Sub-Team Code	

OK
Cancel

Here you can give the name of the sub-team and you can specify a 3 letter code that will appear next to the person's name while scheduling. So for Vocals, you could have the code of Voc.

Team Members

Now that you have your positions and sub-teams created, you can start adding your team members.

Note - New team members must be added as users to servepoint before you can add them to your team, so you will need to go to the "Users" menu on the left, to add all of your servepoint users.

Go to the "Team Members" tab, and hit "Add New Team Member"

Add Team Member

Person

DateJoined

Positions:

Sub-Teams:

Team Administrator Settings

Team Admin

Is Notified of Declines

Add/Edit Events *

Add/Edit Users *

* These privileges are shared with other teams

OK Cancel

Click the blue button in the Person field, to choose a person for your team. When choosing a person, you can search by first or last name.

You can add the Date Joined, but it's not required.

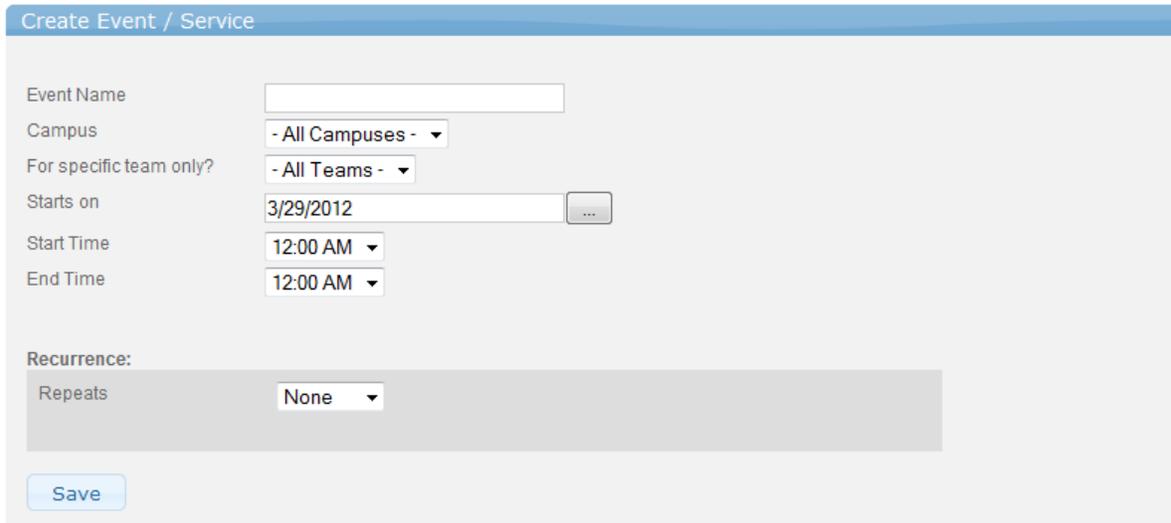
Now, choose the Positions for which this person can serve. Also choose their Sub-Teams if any.

If this person will be a team admin, then you can grant them that ability here. Team admins, of course, are responsible for scheduling and maintaining the team, adding resources, and messages. Most team admins need to be able to add/edit events and users, so choose those settings here.

Events and services

Before you can schedule your team for an event or service, you need to make sure those events have been added to the system. The Super-Admin may have already entered most of your regular services, but if not, you will need to add them.

Click on the “Events” menu on the left, and then click “Create New Event”



The screenshot shows a web form titled "Create Event / Service". The form contains the following fields:

- Event Name: A text input field.
- Campus: A dropdown menu with the option "- All Campuses -".
- For specific team only?: A dropdown menu with the option "- All Teams -".
- Starts on: A date input field showing "3/29/2012" and a calendar icon.
- Start Time: A dropdown menu with the option "12:00 AM".
- End Time: A dropdown menu with the option "12:00 AM".
- Recurrence: A section with a "Repeats" dropdown menu set to "None".

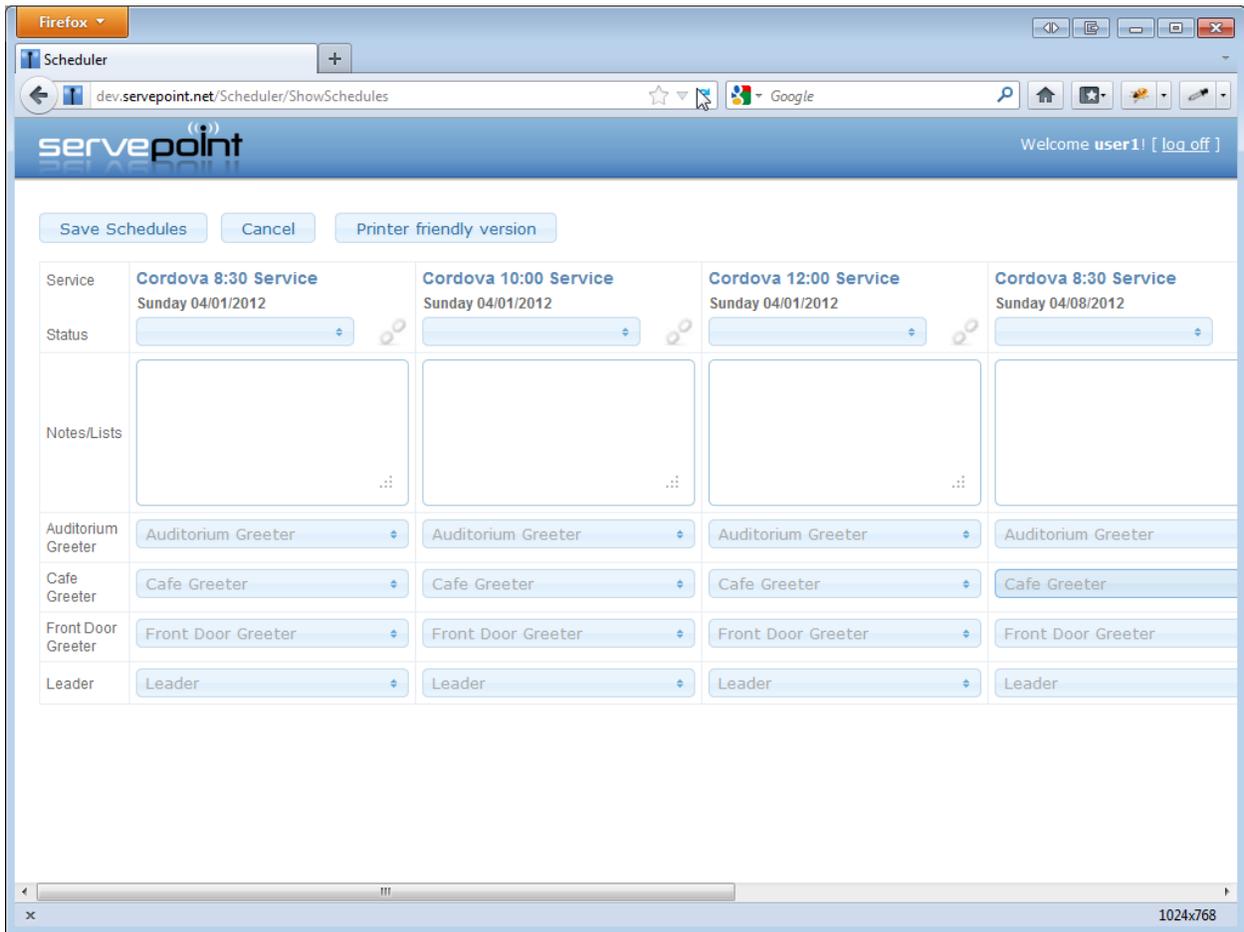
At the bottom of the form is a "Save" button.

Give the event a name. If the event applies to a specific campus only, then choose that campus. Now, most events will probably be shared by **all teams**, so leave this set to “-All Teams-“, unless you want to create a specific event for a team such as a “media team training event”, etc... Choose the Start date and specify any recurring options if needed. For example, to set up a weekly Sunday service, set the Repeats field to “Weekly”. Set the “repeats every” field to 1 (for every 1 week), then choose the day. You can leave the “Ends on date” blank if there isn’t an end date.

Scheduling your team

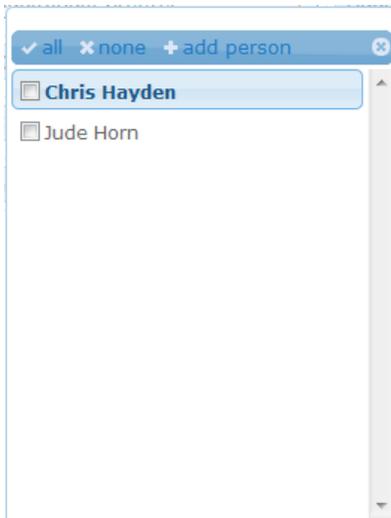
Now that your team is set up with positions and members, and you have events entered, you are ready to schedule your team.

Click on “Scheduler” in the menu on the left. Next, choose the events you want to schedule. You can schedule many events at a time, so this screen will help you narrow it down to just the events you are interested in scheduling. You can choose the team, campus, select specific events, and date range. The scheduler will only show a maximum of 8 events at one time, so try to narrow it down to 8 or less events.



So here's the scheduler showing the first 3 blank schedules for the greeter team. Each column is a different service, and each row is a position to be filled. You also have a spot at the top where you can make some notes for each schedule. This is also great for song lists for the worship team.

Now all you have to do is click on each position and choose the people you want to serve:



This picklist shows you all the team members who have been added to that position. If you want to add another person to this picklist, just hit the "add person" link and choose one of the existing servepoint users.

Each schedule also has a Status field that lets you specify either Working or Active. Working means you haven't finalized the schedule yet, so you don't want notifications to be sent out. If the schedule is complete, then you can set the status

to Active, which means all notifications will be sent. Also, if you need to delete a schedule, you can change the status to Delete.

One quick tip about scheduling multiple services – if you find that you will be scheduling the same people for multiple services, you can click the “link” icon on all the schedules you want to link together. When you do that, any change you make to one schedule will be made to all the linked schedules.

After making all of your changes to your schedules, make sure you hit the “Save Schedules” button.

Scheduler Notification Codes

You will notice as you are scheduling that some of your team member names will have colored codes next to their name. These codes indicate their accept status, availability, conflicts, etc... Here’s a list of the scheduler codes:

A – The User has **Accepted** the assignment

D – The User has **Declined** the assignment

C – There is a time **Conflict** with the assignments of this User

M – The User is scheduled for **Multiple** positions in one Schedule

U – The User is **Unavailable** for this date and time

Anytime you see one of these codes, you can hover over it with your mouse and see more details about the code.

Note – Servepoint is purposefully lenient about scheduling. In other words, it won’t stop you from doing what you want. If a person is already scheduled for another team, servepoint will tell you about it and show you details about the other assignment, but if you decide its ok to schedule them anyway, it will let you do that. Both teams will be able to see the conflict, and you can decide if you need to make any changes or not..

Printing your schedule

To print a schedule, use the Scheduler to pull up the schedule, then hit the “Printer friendly version” button to get a version designed for printing.

Resources

ServePoint allows you to post various resources for your teams. These can be PDF’s, MP3’s, videos, links, etc... Resources can be specific to a schedule, such as MP3’s for a service, or ongoing resources like team guidelines, etc... Ongoing resource can appear at the bottom of a member’s “My Assignments” page for quick access. Scheduled resources appear in the details for a specific schedule on the “My Assignments” page.

To add a resource, click the “Resources” menu item on the left. Then click the “Create New Resource” button.

Create Resource

Team: Greeters

Category / Folder: Groups resources together. Add (folder) at the end to make a folder.

Upload a file: Browse...

Description:

Web link: (you can also drag in YouTube or Vimeo links)

Show under My Resources:

Assigned to schedules:

Save

Resources can be grouped into categories, so if you want to group all of your MP3's together into one group, and all of your lyrics into another group, simply specify a category name. Make sure you spell the category exactly the same for all of your resources.

If you are uploading a file, click the browse button, and choose the file.

If you are adding a video, like youtube or vimeo, paste that link into the web link field.

Now, if you want the resource to be an on-going resource and have it appear on the bottom of the "My Assignments" page, click the option for "Show under My Resources". If you want to assign this resource to a specific schedule, choose the schedule.

Quick tip – If you have a lot of similar resources, and you don't want them to take up the whole page, you can group them into folders. Just add (folder) after the category name. For example, say you have a lot of songs that you want users to get to, but they aren't really scheduled any time soon, you could group them all into an "archive" folder. When you upload the song, just assign it a category of: archive (folder) This will create a folder called archive, and store the resource inside it.

Announcements

You can post team-wide announcements on the "My Assignments" page for your members. To post an Announcement, click on "Announcements" in the menu on the left, then click "Create new message". Add your message, and hit save. The message will appear until you delete it.

Sending messages

The Send Message feature allows you to send text or email messages to your team. To send a message, click on "Send Message" in the menu on the left. This will bring up send message screen. Choose the message type, then use the remaining picklists to narrow down to the people you want to send to. You can send a message to your whole team, or a sub-team, or a specific position or schedule.

Remember, all messages will come from ServePoint, so your users won't be able to reply to them.

Support

Trouble with logging in

If a team member has trouble logging in, you can change their password by going to the Users link on the left, editing their record, and clicking "change password".

Please send any questions, comments or suggestions to support@servepoint.net