Planning Center Online

How-To Instructions

Introduction

As a member of The House Church Ministry Team, you will be receiving and coordinating your schedule via Planning Center Online® (referred to as PCO). This document will assist you in setting up your account and becoming familiar with the software. No download or installation is required, because PCO is completely browser-based, and runs in most modern internet browsers (Internet Explorer, Mozilla Firefox, Google Chrome, Apple Safari). If you have any technical issues, please make sure your browser is updated to the latest available version.

Welcome and Password Setup

The House Church Ministry Team Admin will add you to PCO, and you will receive a Welcome email. You will see your username, which is your email address, and a link to set your password. There is also a link to a tutorial video.
When you click the link to set your password, you will be taken to this screen. Type your new password, type it again to confirm, and click “SET YOUR PASSWORD.” You will be taken to your main dashboard.
Responding to Scheduling Emails

When you are scheduled for a service, you will receive an email notifying you of the service and role for which you have been scheduled, with big buttons to “Accept,” “Decline” and “View This Service.”
Click “Accept” to be taken to the plan for the service (not all can see plan), or click “View This Service” to be taken to the plan; you can accept or decline from this screen as well. If you click “Decline,” you will be taken to a screen that asks you to leave a reason:

In this box please indicate the name of the substitute you have arranged. If you cannot find a sub, please indicate that instead. *Even if you do not provide a reason, you still need to click “Decline & Send Reason.”*
If your Volunteer Coordinator has scheduled you for several services, the email you receive will look like this:

Hi Bob,

You have been placed on the schedule for the following dates. To respond or simply view this schedule, click the appropriate button below.

I appreciate you.

Blessings and peace,

Joanna Neitzell
The House
(507)481-3277

**August 23, 2015**
House Weekend Services [view plan]

<table>
<thead>
<tr>
<th>Connector (Hospitality Team)</th>
<th>Services</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday Service: 08/23 at 10:30A</td>
<td>Pre-Service Prayer: 08/23 at 9:15A</td>
<td></td>
</tr>
</tbody>
</table>

**August 29, 2015**
House Weekend Services [view plan]

<table>
<thead>
<tr>
<th>Connector (Hospitality Team)</th>
<th>Services</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saturday Service: 08/29 at 6:45P</td>
<td>Pre-Service Prayer: 08/29 at 6:00P</td>
<td></td>
</tr>
</tbody>
</table>

**August 30, 2015**
House Weekend Services [view plan]

<table>
<thead>
<tr>
<th>Connector (Hospitality Team)</th>
<th>Services</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday Service: 08/30 at 10:30A</td>
<td>Pre-Service Prayer: 08/30 at 9:15A</td>
<td></td>
</tr>
</tbody>
</table>

[Respond To Requests]
Click “Respond to Requests” and you will be taken to a screen where you will have the option to accept or decline per service:

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Accept</th>
<th>Decline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 22</td>
<td>House Weekend Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sanctuary Set-Up (Hospitality Team)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug 23</td>
<td>House Weekend Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Connector (Hospitality Team)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug 29</td>
<td>House Weekend Services</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Connector (Hospitality Team)</td>
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<tr>
<td>Aug 30</td>
<td>House Weekend Services</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Connector (Hospitality Team)</td>
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</tr>
</tbody>
</table>
Overview of Dashboard

When you login to PCO, the Dashboard is the first screen you will see. At the top left is the Planning Center Online logo. If you ever get lost, click the logo to return to this screen.

At the top is the name of our church. Below that is the “My Schedule” section. Here you will see all the services for which you are scheduled. If there are any pending requests, you can accept or decline right from here. Click on a service to see the plan for that service (not everyone can see service plans).

At the left is your calendar. The highlighted date is the current date. The green triangles are any services you have been scheduled for and that you have confirmed. Services you have declined, or any dates you have blocked out, will show a red circle. Hover your mouse over a date to see a short description with a link to that service.

Below the calendar are buttons for the Master Calendar, Block-out dates and Calendar Integrations. Below that are the most recent blog posts about PCO.
At the top right of the screen you will see your profile picture (if you’ve uploaded one), as well as the link to logout. There is also a link to PCOs extensive help resources.

Manage Your Profile

You can manage all the details and information of your PCO profile by clicking your name at the top right of the screen when you login.

Here you can change your password, add your home or work address, add phone numbers, email addresses, and add your birthday and anniversary.

*Any email addresses you add will function as a username when you login.* You will also receive notifications at each of the email addresses you’ve added. This is useful if you wish to receive emails at work, or if you want someone else to receive a copy of your notifications.

If you add a mobile phone number, you have the option to enable text (SMS) notifications. Make sure to select your carrier, and which notifications you’d like to receive via SMS.
You can also indicate your scheduling preferences by clicking the “Assignments” tab. Any positions you have been assigned will display here, and you can click the drop-down box to the right to indicate a preference for each role. You can also choose a global preference by clicking the drop-down box at the top. Your Servant Coordinator will see these preferences when they attempt to schedule you.
Master Calendar

This is the Master Calendar, which you can access by clicking on the “Master Calendar” button on the left side of the screen after you login to PCO.

Here you will see all your service times and rehearsal times, as well as any days you have blocked out. The controls at the top allow you to filter what appears in the calendar view. You can click on the service times to be taken to the plan of that service (if you have this site permission).
**Block Out Dates**

One of the best features of PCO is the ability to block out any dates for which you are unavailable. When your Servant Coordinator attempts to schedule you for a date you have blocked out, they will receive a warning. *Please keep this updated.*

To block out future dates, login to PCO and click the “Block Out dates” button on the left side of the screen. You will then see this pop-up dialog:

Choose the date or range of dates for which you are unavailable, the time if applicable, and indicate a reason (optional). You can also set a repeat. For instance, if you are never available on the third Sunday of the month, you would block out the third Sunday and set the repeat to “Every Month.” Any dates you have blocked out will show up on your calendar as red circles.
Calendar Sync

You can sync your service schedule with several popular calendaring apps: iCal, Outlook (must be 2007 or later) and Google Calendar. To do so, login to PCO and click the “Calendar Integration” button on the left side of the screen. Click the button for your calendar app and follow the on-screen instructions.

The button for iCal or Outlook will launch your calendar app, and the button for Google will open a browser tab for Google Calendar, with a pop-up box asking if you want to allow Google Calendar to always display this calendar (click “Yes”).

Note: it may take several hours before you see your schedule in Google Calendar. That is because the Google Calendar servers check other calendar apps very infrequently (like once a day!).

Facebook App

Due to recent architectural chances to Facebook, the app no longer has much functionality (according to the PCO website). If you want to use Facebook with PCO, the best way is to apply for a ‘@facebook’ email address (you can do this on Facebook). You will receive a custom email address in this format: ‘username@facebook.com.’

Login into PCO and add this email to your profile. You will then receive all scheduling notifications, emails and reminders via Facebook.
**Viewing Service Plans**

In order to see who else is scheduled for a given service, you will need to view the service plan. This will be useful in the event you need to find a sub, and would like to switch with someone else. To do so, login to PCO and click on any of the services you would like to view. *You will only be able to view services for which you are regularly scheduled*, for instance if you are a Saturday night Greeter, you will not be able to view the Sunday Morning service plans.

At the top will be the service date and your scheduled positions. Below that will be a run sheet of the service.

At the right side of the screen is an option for choosing which notes are visible. Hover your mouse over the drop-down arrow to see the options. The left column of numbers down the right side of the screen indicates any item attachments, and the right column indicates any notes. Hover your mouse over the number to get more info, or download attachments.