Jobs and Scheduling Webinar
May 2014

Job Associations vs. Job assignments

Job Associations - "connected to a job"

Job Assignments - Specific time, and place to do a specific task.

Job association:

Pros: No need to keep a detailed schedule

Cons: Can't see an overview of when/where volunteers are or where you have holes in your schedule.

To create: From the *Person's profile*, *Job associations* on the left navigation bar and then the *Add* link.

Bulk Create from *User tools*, then *Bulk update/create tool* and *Bulk job associations creator*.

Recurring Job Assignments:

Pros: You know who is in the building and when to expect people and you can print calendars and reports.

Cons: You can't see where you have holes in your schedule.

To create: From the *Assignment* panel in a person's profile, select the *Add* link and *Recurring*.

Right-click on a person on a list then Edit/Schedule Assignments then select the *Add* link and *Recurring*.

From the *Job slots calendar* tool by right-clicking and selecting *Create a job assignment* and then *Recurring assignment*.

Slot Assignments:

Pros: You know who is here when, you can print calendars and you can report on where there are holes in your scheduling.

Cons: More upfront time to enter and build the master schedule

To create: From the *Assignment* panel in a *person's profile*, select the *Add* link and *Into a specific slot.*

Right-click on a person on a list then Edit/Schedule Assignments then select the *Add* link and *Slot*.

From the *Job slots calendar* tool by searching for the person and dragging them into the slot.

Non- slot Assignments:

Pros: You know who is in the building and when to expect people and you can print calendars and reports.

Cons: Only good for one shift at a time.

To create: From the *Assignment* panel in a *person's profile*, select the *Add* link and *Non-slot assignment.*

Right-click on a person on a list then Edit/Schedule Assignments then select the *Add* link and *Non-slot assignment..*

Building a schedule in the Job slots calendar tool

Right-click - to Add or Edit slots and assignments

Hover over assignments - to see entrants

Colors indicate how full: Grey - empty

Yellow - partially filled

Green - full or over-filled

Calendar reporting:

Assignment calendar report - shows where you have people

Slot calendar report - shows where you have holes

Cancelling assignments:

From the Job Slots Calendar tool: Right click on the assignment, then *Edit this assignment*. Change the Status field to desired reason.

From a list of people: Right-click on a person on a list then *Edit/Schedule Assignments*. From the listing of assignments, click open the recurring assignment to see the specific assignments, then click one the one you want to change and edit the *Status*.

From a person's profile: Go into the *Jobs* panel. From the listing of assignments, click open the recurring assignment to see the specific assignments, then click one the one you want to change and edit the *Status*.

Walkup checkin Jobs:

Pros: Shows on the kiosk

Cons: No way to see who to expect or when.

To create: *Setup menu -> Jobs -> Walkup checkin jobs.*