

VSys Webinar – Schedules Winter 2022

Vocabulary review:

Job Association – this is the loosest connection to what people do. This allows them to show up on rosters and clock hours. If your data did not have explicit time/place information this is how it came over.

Job Assignment - tells the system when, where, what to expect for these volunteers and can show them on calendars and schedules.

Recurring assignments – these are your “every week at the information desk indefinitely” volunteers.

Slots – the reverse of an assignment a slot is your needs, a schedule space you need a volunteer’s assignment to fill.

Slots = Needs

It’s the opposite of an assignment but needs the same information – *I need 3 Wayfinders, Monday-Friday, 8am to noon.* And you can make a year’s worth at once if they are all the same.

1) Job slots and assignments into them tool (Grid format)

How to read it:

- Required - How many people you want doing the task
- Assigned - How many people are scheduled
- Remaining - How many people you still need.

Job	Day	Start	Duration	Required	Assigned	Remaining	Supervisor	Location
Coffee Shop/CS Money Counter	Fri	03/11/2016 08:00 AM (B)	4:00	1	0	1		General
Coffee Shop/CS Money Counter	Mon	03/14/2016 08:00 AM (A)	4:00	1	0	1		General
Coffee Shop/CS Money Counter	Wed	03/16/2016 08:00 AM (A)	4:00	1	0	1		General
Info/Reg/Flower Delivery/New Lobby Info Desk	Thu	03/10/2016 12:00 PM (B)	4:00	2	1	1	Turner, Barbara R	General
							Female	
Info/Reg/Flower Delivery/New Lobby Info Desk	Tue	03/15/2016 12:00 PM (A)	4:00	2	0	2		General

Creating slots:

Use the **Add job slot** link on the top left or right-click in the grid for similar options.

You'll note the box to create a job slot looks a lot like the recurring assignment rules.

Add job slot

Job: Coffee Shop/Coffee Geeks ☐ Do not show for lookup on VSys Live

First slot date: 03/12/2016 Last slot date: 03/12/2016 People needed: 1

Start time each day: 12:00 AM End time each day: 12:00 AM Duration of each: 00:00 Weeks: (all)

☐ All day

Days of the week: ☒ Sat

Locations: General Supervisor: Required people types: (no requirement)

Required groups: (no requirement)

Comments:

☐ Show on main calendar in VSys Live while volunteers still needed

☒ Use job VSys Live settings

☐ Limit VSys Live dates

No duration provided

Test Create Cancel

2) Job slots calendar tool (advanced) - calendar tool to visually see the schedules.

How to read it:

- Green - filled or overfilled
- Yellow - partially filled
- Red - empty

VSys One (Melissa's test data)

VSys One > Jobs/slots calendar advanced

Bookmarks (add bookmark)

Add

Click to add slots

Filters

Jobs: (no filter)

Locations: (no filter)

Slot statuses: (no filter)

Supervisors: (no filter)

Show

Date: 03/01/2016

Display: Monthly

Name format: Doe, John A

Show: Job names, Location names

Apply

Tools

Print

March, 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	1 Noon-4pm (4hr) New Lobby Info Desk General (0/2)	2 8am-Noon (4hr) CS Money Counter General (0/1)	3 Noon-4pm (4hr) New Lobby Info Desk General (0/2)	4 8am-Noon (4hr) CS Money Counter General (0/1)	5
6	7 8am-Noon (4hr) CS Money Counter General (0/1)	8 Noon-4pm (4hr) New Lobby Info Desk General (1/2) Morton Elizabeth A	9 8am-Noon (4hr) CS Money Counter General (0/1)	10 Noon-4pm (4hr) New Lobby Info Desk General (1/2) Turner Barbara R	11 8am-Noon (4hr) CS Money Counter General (0/1)	12
13	14 8am-Noon (4hr) CS Money Counter General (0/1)	15 Noon-4pm (4hr) New Lobby Info Desk General (0/2)	16 8am-Noon (4hr) CS Money Counter General (0/1)	17 Noon-4pm (4hr) New Lobby Info Desk General (0/2)	18 8am-Noon (4hr) CS Money Counter General (0/1)	19
20	21 8am-Noon (4hr) CS Money Counter General (0/1)	22 Noon-4pm (4hr) New Lobby Info Desk General (2/2) Lewis Andrea, Morton Elizabeth A	23 8am-Noon (4hr) CS Money Counter General (0/1)	24 Noon-4pm (4hr) New Lobby Info Desk General (1/2) Turner Barbara R	25 8am-Noon (4hr) CS Money Counter General (1/1) Lewis keeley	26
27	28 8am-Noon (4hr) CS Money Counter General (0/1)	29 Noon-4pm (4hr) New Lobby Info Desk General (0/2)	30 8am-Noon (4hr) CS Money Counter General (0/1)	31 Noon-4pm (4hr) New Lobby Info Desk General (0/2)	1	2

Creating slots:

Start from the **Click to add slots** dropdown and select the job.
Drag it where you want it on the calendar.

Adding People: Use the **Add people** link

VSys One (Melissa's test data)

VSys One > Jobs/slots calendar advanced

Bookmarks (add bookmark)

Add

Click to add slots

Add people

Filters

Jobs: (no filter)

Locations: (no filter)

Slot statuses: (no filter)

Supervisors: (no filter)

Show

Date: 03/01/2016

Display: Monthly

Name format:

March, 2016

Look up method: Quick

Search: lee

Search Cancel

Matc...	Name	DOB	Age	Phone home	Gend...	Person ...
0	Lee, Jay M.	12/05/1963	52	(322) 555-5429	Male	Volunteer
0	Lee, Joanne G.	05/25/1976	39	(120) 555-5485	Female	Volunteer
0	Lee, John K.	02/06/1969	47	(251) 555-9419	Male	Volunteer
0	Lee, Lawrence B.	06/06/1968	47	(795) 555-8762	Male	Volunteer
0	Lee, Lynn J.	03/25/1985	30	(317) 555-8013	Female	Volunteer
0	Lee, Mary C.	08/14/1962	53	(860) 555-6541	Female	Volunteer
0	Lee, Melvin V.	05/01/1977	38	(331) 555-4298	Male	Volunteer
0	Lee, Sally M.	01/13/1943	73		Female	Volunteer
0	Lee, Stephanie C.	01/05/1977	39	(988) 555-4494	Female	Volunteer

19 people found

One time:

- Click on **Add people**
- Look up the person
- Drag someone into the slot

Recurring Assignments:

- Click on **Add people**
- Look up the person
- Drag them onto an empty part of the grid and select what type of assignment

Create recurring assignment

Method: (all)

Days: None selected

Months: (all)

Job:

Location:

Supervisor:

Start date: 03/12/2016

Start time: 12:00 AM

End time: 12:00 AM

Duration each day: 00:00

Extend assignments through: 03/07/2017

New assignment status: Normal

☒ Allow creation of assignments into the past [Edit comments](#)

Generate assignments

Method, days of the week, months, job, and location and duration must all be selected

Save Cancel

So when do I use slots?

- 1) When you want to see a “needs” calendar. Have someplace that staffing is critical? This will let you see and search for your holes.
- 2) When you want volunteers to be able to self-schedule. Slots are what drive the openings for a volunteer to see when they can schedule.

What if I don't want to do either of those things – do I need slots? No. All you really need to organize your volunteers are job associations – to connect them to what they are doing. Assignments are nice for calendars and schedules, but its up to you if schedules change quickly. And even if you use slots, you don't need to use them for all your positions.

Best practice: Ideally you should make each day's worth of slots for a position independently. Why? If there is a change it's cleaner to edit just one.

Reports

- Assignments - Focus on the people and their schedules
- Slots – Focus on the needs, some people information can be included
- Program statistics – Nothing about the schedules per se, but you can see statistics of what you needed vs what was covered.

First choice - Assignment calendar report

PDF – straight print

RTF – opens in Word