VSys Webinar – Schedules (VSys Anywhere)
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.

Assignments = Expecting a volunteer

The first, and most common way, to add and assignment is in a person's profile. This can be done under **Assignments** (for one time) or **Assignments (recurring)** for something that is a long-term, regular assignment.

You are looking for the same information you would tell a volunteer – what, where, when, supervisor.

Tip: If you are adding a new assignment or changing an existing one, ALWAYS click **Apply Rules** to recalculate the individual detail assignments.
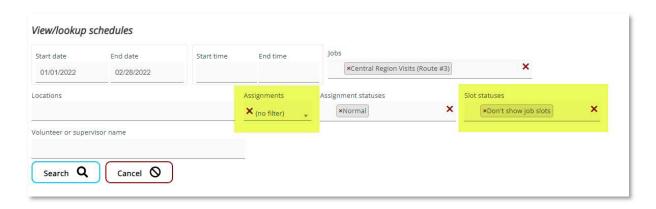

Shortcut: Use the Action Link at the end of their name in the results from People Search as a quick link.

Viewing Schedules

There are generally two ways to view schedules, and both allow you to see assignments and slots. How you set the filters for Assignments and Slots will control what you see. There should be an option on your top menu for **Schedules**.

1) **Schedule Lookup -** calendar tool to visually see the schedules.

The screenshot below shows filtering for all assignments (no filter) with a normal status and to not show slots.

When we see this in Schedule Lookup, if you look at Friday, you will see two assignments for the same position.
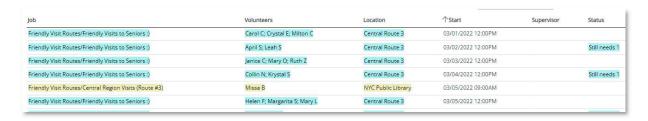

If we change that Slot statuses to show all slot statuses, then we see those wrapped in a single slot with both volunteers.

How to read it: (this may vary based on colors your organization has chosen)
- o Blue - filled or overfilled
- o Green - partially filled
- o Red – empty
- o Ivory – assignments not in slots

2) **Schedule Lookup (Grid format)** – table/grid format to see assignments and/or slots

This shows the same information, and filters the same way, but in a listing format. If you need a quick printout this allows to save to Excel or copy and paste to a word processor.
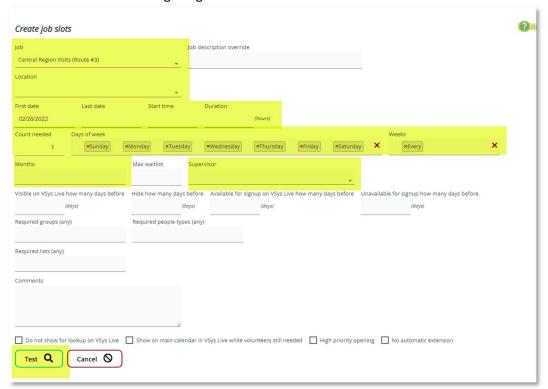
Job	Volunteers	Location	↑Start	Supervisor	Status
Friendly Visit Routes/Friendly Visits to Seniors :)	Carol C; Crystal E; Milton C	Central Route 3	03/01/2022 12:00PM		
Friendly Visit Routes/Friendly Visits to Seniors :)	April S; Leah S	Central Route 3	03/02/2022 12:00PM		Still needs 1
Friendly Visit Routes/Friendly Visits to Seniors :)	Janice C; Mary O; Ruth Z	Central Route 3	03/03/2022 12:00PM		
Friendly Visit Routes/Friendly Visits to Seniors :)	Collin N; Krystal S	Central Route 3	03/04/2022 12:00PM		Still needs 1
Friendly Visit Routes/Central Region Visits (Route #3)	Missa B	NYC Public Library	03/05/2022 09:00AM		
Friendly Visit Routes/Friendly Visits to Seniors :)	Helen F; Margarita S; Mary L	Central Route 3	03/05/2022 12:00PM		

Slots = Need a volunteer

It's the opposite of an assignment but needs the same information – I ***need*** *3 Wayfinders, Monday-Friday, 8am to noon.*

Creating slots:
Use the **Create Slots** option (probably on your menu under Slots). You'll note the box to create a job slot looks a lot like the recurring assignment rules.

Note: After clicking **Test**, don't forget to save them if they look right.

Edit slots/Edit slots (inline)
The **Edit slots** tool lets you modify a single slot. Closed for an event? Need extra help the day after a holiday, this allows you to make the middle adjustments.
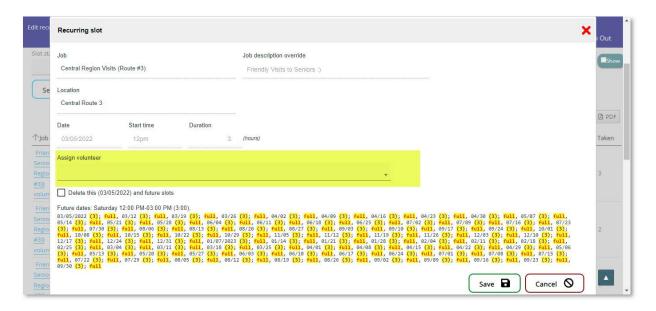

Edit Recurring
Need to make changes to the whole slot sequence? Maybe the shift is changing from 9am-11am to 10am-12pm, then you can edit the recurring slot.

You can also assign a volunteer here instead of making a recurring assignment. Use the **Edit/assign volunteer** link. This is a great shortcut if you are building a new schedule.

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