

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 an 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.

Recurring assignment

Job

KIDS Read

Location

First date

02/28/2022

End date

02/18/2024

Start time

12am

Duration each day

Months

January

February

March

April

May

June

July

August

September

October

November

December

Days of week

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Weeks

Every

Status

Normal

Supervisor

☐ Prevent bulk/automatic extension

Apply rules

Comments

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.

View/lookup schedules

Start date: 01/01/2022 End date: 02/28/2022 Start time: End time: Jobs: Central Region Visits (Route #3)

Locations: Assignments: (no filter) Assignment statuses: Normal Slot statuses: Don't show job slots

Volunteer or supervisor name:

Search Cancel

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1	2	3	4	5
12p Friendly Visits to Seniors :) 02/27/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Essie H	12p Friendly Visits to Seniors :) 02/28/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, John A	12p Friendly Visits to Seniors :) 03/01/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Carol C	12p Friendly Visits to Seniors :) 03/02/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, April S	12p Friendly Visits to Seniors :) 03/03/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Janice C	12p Friendly Visits to Seniors :) 03/04/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Collin N	9a Central Region Visits (Route #3)
12p Friendly Visits to Seniors :) 02/27/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Lucy P		+2 more	12p Friendly Visits to Seniors :) 03/02/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Leah S	+2 more	12p Friendly Visits to Seniors :) 03/04/2022 Noon-3pm (3.00) Location: Olathe Healthcare Group Wanted: 3, Krystal S	+3 more

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1	2	3	4	5
		12p Job: Friendly Visits to Seniors :) Details: Job details Start date: 03/01/2022 Start time: 12:00 PM Location: Olathe Healthcare Group Location details: Location details Carol C, Crystal E, Milton C	12p Job: Friendly Visits to Seniors :) Details: Job details Start date: 03/02/2022 Start time: 12:00 PM Location: Olathe Healthcare Group Location details: Location details April S, Leah S	12p Job: Friendly Visits to Seniors :) Details: Job details Start date: 03/03/2022 Start time: 12:00 PM Location: Olathe Healthcare Group Location details: Location details Janice C, Mary O, Ruth Z	12p Job: Friendly Visits to Seniors :) Details: Job details Start date: 03/04/2022 Start time: 12:00 PM Location: Olathe Healthcare Group Location details: Location details Collin N, Krystal S	9a Central Region Visits (Route #3) 12p Job: Friendly Visits to Seniors :) Details: Job details Start date: 03/05/2022 Start time: 12:00 PM Location: Olathe Healthcare Group Location details: Location details Heleen F, Margarita S, Mary L

How to read it: (this may vary based on colors your organization has chosen)

- Blue - filled or overfilled
- Green - partially filled
- Red – empty
- 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.

Create job slots

Job

Central Region Visits (Route #3)

Job description override

Location

First date

02/28/2022

Last date

Start time

Duration

(hours)

Count needed

1

Days of week

☒Sunday

☒Monday

☒Tuesday

☒Wednesday

☒Thursday

☒Friday

☒Saturday

☒Every

Weeks

☒

☒

Months

Max waitlist

Supervisor

Visible on VSys Live how many days before

(days)

Hide how many days before

(days)

Available for signup on VSys Live how many days before

(days)

Unavailable for signup how many days before

(days)

Required groups (any)

Required people types (any)

Required lists (any)

Comments

☐ Do not show for lookup on VSys Live

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

☐ High priority opening

☐ No automatic extension

Test

Cancel

Recurring slot
✕

Job

Central Region Visits (Route #3)

Location

Central Route 3

Date	Start time	Duration
03/05/2022	12pm	3 (hours)

Assign volunteer

☐ Delete this (03/05/2022) and future slots

Job description override

Friendly Visits to Seniors :)

Future dates: Saturday 12:00 PM-03:00 PM (3:00).
03/05/2022 (3); full, 03/12 (3); full, 03/19 (3); full, 03/26 (3); full, 04/02 (3); full, 04/09 (3); full, 04/16 (3); full, 04/23 (3); full, 04/30 (3); full, 05/07 (3); full, 05/14 (3); full, 05/21 (3); full, 05/28 (3); full, 06/04 (3); full, 06/11 (3); full, 06/18 (3); full, 06/25 (3); full, 07/02 (3); full, 07/09 (3); full, 07/16 (3); full, 07/23 (3); full, 07/30 (3); full, 08/06 (3); full, 08/13 (3); full, 08/20 (3); full, 08/27 (3); full, 09/03 (3); full, 09/10 (3); full, 09/17 (3); full, 09/24 (3); full, 10/01 (3); full, 10/08 (3); full, 10/15 (3); full, 10/22 (3); full, 10/29 (3); full, 11/05 (3); full, 11/12 (3); full, 11/19 (3); full, 11/26 (3); full, 12/03 (3); full, 12/10 (3); full, 12/17 (3); full, 12/24 (3); full, 12/31 (3); full, 01/07/2023 (3); full, 01/14 (3); full, 01/21 (3); full, 01/28 (3); full, 02/04 (3); full, 02/11 (3); full, 02/18 (3); full, 02/25 (3); full, 03/04 (3); full, 03/11 (3); full, 03/18 (3); full, 03/25 (3); full, 04/01 (3); full, 04/08 (3); full, 04/15 (3); full, 04/22 (3); full, 04/29 (3); full, 05/06 (3); full, 05/13 (3); full, 05/20 (3); full, 05/27 (3); full, 06/03 (3); full, 06/10 (3); full, 06/17 (3); full, 06/24 (3); full, 07/01 (3); full, 07/08 (3); full, 07/15 (3); full, 07/22 (3); full, 07/29 (3); full, 08/05 (3); full, 08/12 (3); full, 08/19 (3); full, 08/26 (3); full, 09/02 (3); full, 09/09 (3); full, 09/16 (3); full, 09/23 (3); full, 09/30 (3); full

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