

## Associations, Assignments, Slots – VSys One March 2024

### 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 schedule information this is how it came over in conversion.

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

**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.

### What your volunteers are doing. From the person record

#### Job Associations

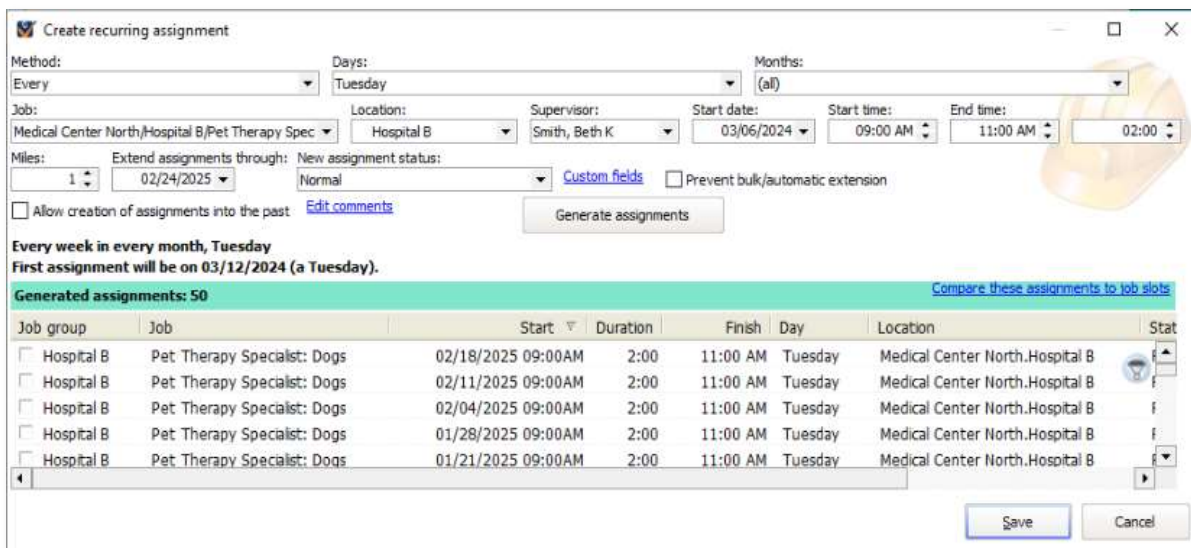


Job	Status	Start	End	Location
Hospice/Home Health/Hospice/Care visit	Active	05/13/2020		Suburban Hos
Hospice/Home Health/Friendly Visit Routes/South Region Visits (Route #2)	Pending	04/04/2017		Suburban Hos
Medical Centers East/[EVAL] Clinic 1/Gift shop	Active	07/15/2015		Medical Cente
Medical Centers East/Hospital A/Emergency Room Support Team	Inactive	07/15/2015	08/31/2016	Medical Cente

While job associations can be something a volunteer needs to be qualified to do, it can also be a variable for hours management breakout – committees, programs, anything that requires hours tracking. Then this can be a filter for communication – example, email everyone who has a Job Assignment of “Gift Shop”.

#### Recurring Assignments

Recurring Assignments require the same information you would tell a volunteer – Job, Location, Start date, times. It’s more specific than a Job Association.



Method: Every Days: Tuesday Months: (all)

Job: Medical Center North/Hospital B/Pet Therapy Spec Location: Hospital B Supervisor: Smith, Beth K Start date: 03/06/2024 Start time: 09:00 AM End time: 11:00 AM Duration: 02:00

Miles: 1 Extend assignments through: 02/24/2025 New assignment status: Normal Custom fields Prevent bulk/automatic extension

☐ Allow creation of assignments into the past Edit comments

Generate assignments

Every week in every month, Tuesday  
First assignment will be on 03/12/2024 (a Tuesday).

Generated assignments: 50 Compare these assignments to job slots

Job group	Job	Start	Duration	Finish	Day	Location	Stat
<input type="checkbox"/> Hospital B	Pet Therapy Specialist: Dogs	02/18/2025 09:00AM	2:00	11:00 AM	Tuesday	Medical Center North.Hospital B	
<input type="checkbox"/> Hospital B	Pet Therapy Specialist: Dogs	02/11/2025 09:00AM	2:00	11:00 AM	Tuesday	Medical Center North.Hospital B	
<input type="checkbox"/> Hospital B	Pet Therapy Specialist: Dogs	02/04/2025 09:00AM	2:00	11:00 AM	Tuesday	Medical Center North.Hospital B	
<input type="checkbox"/> Hospital B	Pet Therapy Specialist: Dogs	01/28/2025 09:00AM	2:00	11:00 AM	Tuesday	Medical Center North.Hospital B	
<input type="checkbox"/> Hospital B	Pet Therapy Specialist: Dogs	01/21/2025 09:00AM	2:00	11:00 AM	Tuesday	Medical Center North.Hospital B	

Save Cancel

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Once you have entered the specifications click **Generate Assignments** to preview. Save what you have tested to add it to the volunteer's profile. Clicking it in the profile will bring up a list of the specific shifts.

Assignments: 24 plus 6 not shown				<a href="#">Add</a> <a href="#">Show other projects</a> <a href="#">Hide past</a> <a href="#">Cancel</a>	
Job	Start	Duration/finish	Location		
Hospital B / Pet Therapy Specialist: Dogs	03/12/2024	2:00			
09:00 AM-11:00 AM (2:00); Every Tue (all months)	Tue	Extended to 02/24/2025	Medical Center North.Hospital		

After you're done – remember to **Save** the profile as well.

## Schedules

**Job/slot calendar tool** or **Job/slot calendar tool (advanced)** show your schedule in a calendar format (use **View job slots and assignments** into them if you are a chart/table person)

**Tools**  
[View mode: 1 day](#)  
[Find people \(by name\)](#)  
[Find people \(by history\)](#)  
[Find people \(advanced\)](#)  
[Refresh](#)  
[Load/save criteria](#)  
**Help**  
 Add job slots:  
 Click to add slots  
 Filter jobs:  
 Pet Therapy Specialist: Dogs  
 Filter locations:  
 No filter)  
 Filter job slots statuses:  
 All)  
 Show non-slot assignments  
 Filter job tags:  
 No filter)  
 Filter supervisors:  
 No filter)  

March 2024  
 S M T W T F S  
 25 26 27 28 29 1 2  
 3 4 5 6 7 8 9

Slots/assignments in 22 jobs/job groups not shown [show them](#)  
 Date: 03/06/2024 Time interval: 60 Day starts: 05:00 AM Ends: 11:59 PM  
 03/06/2024 - 03/06/2024  
 Wed 03/06/2024  

5 00 AM	
6 00 AM	6am (0/1) Pet Therap... Hospital B Pet Therapy Specialist: Dogs Medical Center
7 00 AM	
8 00 AM	8am (1/1) Pet Therap... Hospital B Pet Therapy Specialist: Dogs Medical Center
9 00 AM	
10 00 AM	9am (0/2) Pet Therap... Hospital B Pet Therapy Specialist: Dogs Medical Center
11 00 AM	10am (3/5) Pet Thera... Hospital B Pet Therapy
12 00 PM	
1 00 PM	
2 00 PM	
3 00 PM	
4 00 PM	4pm-1:30am (+1) (recurring) McCutcheon, Alma W Hospital B Pet Therapy Specialist: Dogs Medical Center North.Hospital B
5 00 PM	
6 00 PM	
7 00 PM	

This shows the Pet Therapy schedule for this day. You see both non-slot Assignments (white with green bar) and Slots. Slots indicate how many of a position you might need, and bundles up the assignments that match.

### Color code:

- Beige – unconnected assignments
- Grey – slots that are empty
- Yellow – slots that are partially full
- Green – slot is fully staffed

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*Hint: Use the filters on the left to view a subset if there is too much on the screen.*

### Job/Slot Calendar tool (advanced)

This tool shows the same information just in a different layout. Red shows empty slots, green filled. Non-slot assignments show in bold. Filters on the left will allow filtering of the view.

The screenshot shows the 'VSys One (Jobs and scheduling) > Jobs/slots calendar advanced' interface. It features a sidebar with filters for Jobs (Pet Therapy Specialist: Dogs, KIDS), Locations (no filter), and Slot statuses (no filter). The main calendar displays slots for March 2024, with columns for Sunday through Saturday. Slots are color-coded: red for empty and green for filled. Non-slot assignments are shown in bold. The sidebar on the right lists assignments for each day, including '8am-11am (3hr) Pet Therapy Specialist: Dogs' and '5pm-8pm Pet Therapy Specialist: Dogs'.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
3	8am-11am (3hr) Pet Therapy Specialist: Dogs (0/1)	6am-9am (3hr) Pet Therapy Specialist: Dogs (0/1)	6am-9am (3hr) Pet Therapy Specialist: Dogs (0/1)	6am-9am (3hr) Pet Therapy Specialist: Dogs (0/1)	6am-9am (3hr) Pet Therapy Specialist: Dogs (0/1)	6am-9am (3hr) Pet Therapy Specialist: Dogs (0/1)	10am-Noon Pet Therapy Specialist: Dogs (0/1)
4	5pm-8pm Pet Therapy Specialist: Dogs (0/2)	7am-9am (2hr) KIDS Read Test (KIDS Read) (0/2)	8am-11am (3hr) Pet Therapy Specialist: Dogs (0/1)	7am-9am (2hr) KIDS Read Test (KIDS Read) (0/2)	8am-11am (3hr) Pet Therapy Specialist: Dogs (0/1)	7am-9am (2hr) KIDS Read Test (KIDS Read) (0/2)	11am-3:30pm Pet Therapy Specialist: Dogs (0/1)
5		8am-11am (3hr) Pet Therapy Specialist: Dogs (0/2)	9am-Noon Pet Therapy Specialist: Dogs (0/1)	8am-11am (3hr) Pet Therapy Specialist: Dogs (0/2)	9am-Noon Pet Therapy Specialist: Dogs (0/1)	8am-11am (3hr) Pet Therapy Specialist: Dogs (0/2)	3pm-7pm Pet Therapy Specialist: Dogs (0/1)

### Slots

*So when do I use slots?*

- 1) When you want to see a “needs” calendar. Do you 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 online in VSys Live.

*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 it's up to you. If schedules change quickly, it might not be an efficient use of your time to keep them updated. And even if you use slots, you don't need to use them for all your positions.

### Creating Slots

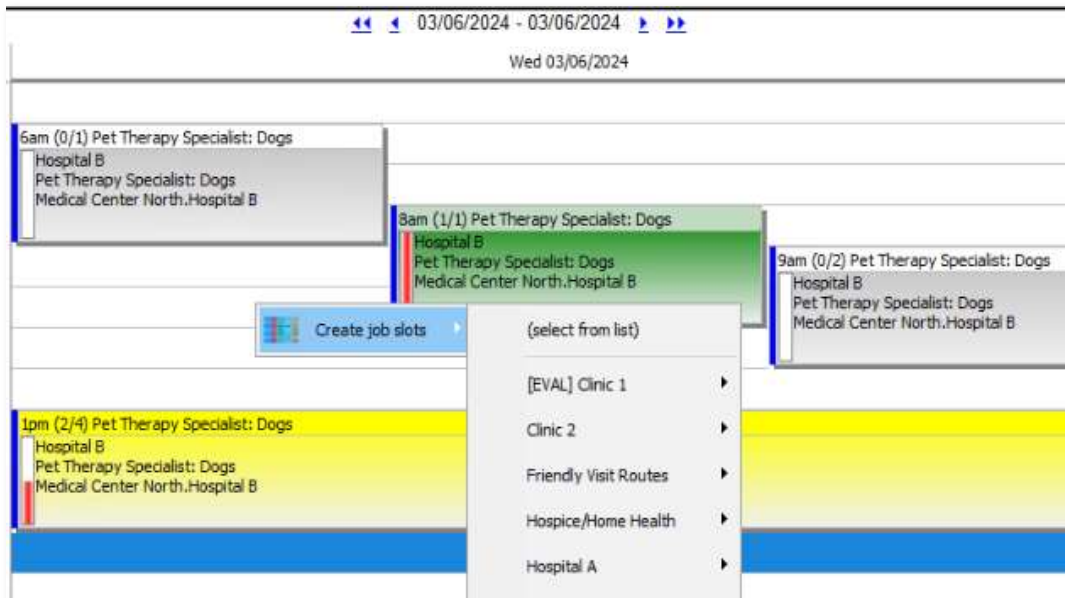
In the job section, you can create slots from three tools. Which is best for you depends on which works the best for you in viewing your data:

- Job/slots calendar tool
- Job/slots calendar tool (advanced)
- Job slots and assignments into them

A slot is 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.

#### How to add (Job/slot calendar tool):

Right click in the day grid -> **Create job slots -> select the job**



The important things are in yellow:

**Add job slot**

Job: Medical Center North/Hospital B/Pet Therapy Specialist: Dogs

Override description:

First slot date: 03/06/2024 Last slot date: 03/06/2024 People needed: 1 Max self-waitlist: 1

Start time each day: 10:00 AM End time each day: 11:00 AM Duration of each: 01:00

Miles: 1 Weeks: Every

Days of the week: ☒ Wed

Locations: Medical Center North Supervisor: Smith, Beth K Required people types: (no requirement) Required groups: (no requirement)

Required lists (any): (no requirement) Job tags: (none) ☐ No automatic extension ☐ Allow creation of slots that exactly duplicate existing ones

Comments:

☐ Do not show for lookup on VSys Live ☐ Show on main calendar in VSys Live while volunteers still needed ☐ High priority opening

☒ Use job VSys Live settings

**Job slots**

Job	Date	Start	Count	Duration	Location	Supervisor	Status	Day
Pet Therapy Specialist: Dogs	03/06/2024	10:00 AM	1	1:00	Medical Center North	Smith, Beth K	Created	Wednesday



Use the checkboxes on the bottom to hide or show on VSys Live or to indicate it is a short-term shift that should not be extended. Click **Test** before creating, and do a double-check that the times and the days of the week are right. Click **Save** when you are done.

*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.*

### Not getting what you expect?

Things need to match up. If the slot is 8am-12pm, but you know Dave comes in 8:30-12:30pm. They aren't going to line up. Hover over the assignment to see the details and compare them. After you look at a couple it will be easy to spot what the mistake is. Correct either and try again.

Note: You can build them in either order – assignments first or slots first. As long as they have the same elements they will line up in the end.

### **Adding a recurring assignment from the calendar**

Sometimes it's easier to add a recurring assignment where you can see the schedule.

Job/slot calendar tool: Use the **Find people** tools to get the person, then drag them over into the white space.

The screenshot displays the VSys One Jobs/slots calendar tool interface. The main calendar view shows slots for 03/06/2024. A red box highlights the 'Find people (by name)' and 'Find people (by history)' tools in the left sidebar. A red arrow points to the 'Recurring assignment' button at the bottom. The right panel shows the 'Assignment selector' with 'Source criteria' and 'Job association' details. The 'Job association' section shows 'One or more; Jobs: Hospital B (Pet Therapy Specialist: Dogs)'.

Job/slot calendar (advanced): Use the **Add people** link to get the person, then drag them over into the white space.

The screenshot displays the VSys One Job/slot calendar interface. On the left, there is a sidebar with filters and a 'Show' button. The main area shows a calendar for March 2024, with slots for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. A red box highlights the 'Add people' link in the 'Add' section. A red arrow points from the 'Add people' link to the 'Person lookup: Quick' window. The 'Person lookup: Quick' window shows a search for 'bergin' and a list of results. The results table is as follows:

Makc...	Name	DOB	Gender	Person type	All groups	Comp...
<input type="checkbox"/>	0 Bergin, Melissa Test	10/21/1963	Female	Supervisor	Medical Center East	
<input type="checkbox"/>	0 Burgin, Gayle	10/09/1953	Female	Vendor	Medical Center East	
<input type="checkbox"/>	0 Burgin, Gayle A	10/09/1953	Female	Community Service	Medical Center East	