

Associations, Assignments, Slots - VSys Webinar (VSys Anywhere) Fall 2025

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.

The screenshot shows a web form for configuring an assignment for a user named "Bergin, Melissa Test". The form includes the following fields and options:

- Job:** Information desk
- Location:** Hospital B
- Allow start dates in the past
- First date:** 11/11/2025
- End date:** 11/11/2026
- Start time (12am):** 12am
- Duration each day:** (empty)
- Months:** *January, *February, *March, *April, *May, *June, *July, *August, *September, *October, *November, *December (all selected)
- Days of week:** *Sunday, *Monday, *Tuesday, *Wednesday, *Thursday, *Friday, *Saturday (all selected)
- Weeks:** *Every (selected)
- Status:** Normal
- Supervisor:** *Smith, Beth K
- Prevent bulk/automatic extension
- Note:** Note that these rules are not applied and new detail assignments are not created until you click [Apply rules]
- Apply rules** button with a magnifying glass icon
- Comments:** (empty text area)
- Save** and **Cancel** buttons at the bottom right.

*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 menu for **Schedules** or search in the tools box for **Schedule**.

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

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

The screenshot shows the 'View/lookup schedules' interface. It includes filters for Start date (11/11/2025 to 11/30/2025), End date, Start time, End time, Jobs (Information desk), Locations, Assignments (no filter), Assignment statuses (Normal), Slot statuses (Don't show job slots), and a search bar. There are also buttons for Search, Cancel, and Bookmark.

When we see this in Schedule Lookup, if you look at Thursday, you will see four assignments for the 2-5pm.

The screenshot shows the Schedule Lookup calendar for Nov 9 - 15, 2025. The calendar shows assignments for the Information desk job across the week. A red box highlights four assignments for Thursday, Nov 13, 2025, from 2pm to 5pm.

Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13	Fri 11/14	Sat 11/15
		11a Information desk 11am - 3pm (4:00) Medical Center North Hospital B : Melanie C	1p Information desk 1pm - 5pm (4:00) Medical Center North Hospital B : Elnieda R	7a Information desk 7am - 9am (2:00) Medical Center North Hospital B : Michelle S	1p Information desk 1pm - 5pm (4:00) Medical Center North Hospital B : Lynn L	9a Information desk 9am - Noon (3:00) Medical Center North Hospital B : Alissa F
		3p Information desk 3pm - 6pm (3:00) Medical Center North Hospital B : Margaret C	1p Information desk 1pm - 5pm (4:00) Medical Center North Hospital B : Lynn L	11a Information desk 11am - 3pm (4:00) Medical Center North Hospital B : Melanie C	3p Information desk 3pm - 6pm (3:00) Medical Center North Hospital B : Margaret C	10a Information desk 10am - Noon (2:00) Medical Center North Hospital B : Kelli A
		4p Information desk 4pm - 5pm (1:00) Medical Center North Hospital B : Carrie B	1p Information desk 1pm - 4pm (3:00) Medical Center North Hospital B : Diana W	2p Information desk 2pm - 5pm (3:00) Medical Center North Hospital B : Jessica B	3p Information desk 3pm - 7pm (4:00) Medical Center North Hospital B : Isabel R	3p Information desk 3pm - 7pm (4:00) Medical Center North Hospital B : Michael H
			4p Information desk 4pm - 7pm (3:00) Medical Center North Hospital B : Edward O	2p Information desk 2pm - 5pm (3:00) Medical Center North Hospital B : Josephine C	4p Information desk 4pm - 7pm (3:00) Medical Center North Hospital B : Shanta C	
				2p Information desk 2pm - 5pm (3:00) Medical Center North Hospital B : Loretta L		
				2p Information desk 2pm - 5pm (3:00) Medical Center North Hospital B : Paul S		
				4p Information desk 4pm - 7pm (3:00) Medical Center North Hospital B : Patricia H		
				4p Information desk 4pm - 5pm (1:00) Medical Center North Hospital B : Carrie B		

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

Today

Nov 9 – 15, 2025

[Agenda day](#)
[Agenda week](#)
[Day](#)
[Week](#)
[List](#)
[Month](#)

Sun 11/9	Mon 11/10	Tue 11/11	Wed 11/12	Thu 11/13	Fri 11/14	Sat 11/15
		11a Information desk 11am - 3pm -(4:00) Medical Center North Hospital B : Melanie C	1p Information desk 1pm - 5pm -(4:00) Medical Center North Hospital B : Elfrieda R	7a Information desk 7am - 9am -(2:00) Medical Center North Hospital B : Michelle S	1p Information desk 1pm - 5pm -(4:00) Medical Center North Hospital B : Lynn L	9a Information desk 9am - Noon -(3:00) Medical Center North Hospital B : Alissa F
		2p Information desk (2:00) @ Medical Center North Hospital B	1p Information desk 1pm - 5pm -(4:00) Medical Center North Hospital B : Lynn L	11a Information desk 11am - 3pm -(4:00) Medical Center North Hospital B : Melanie C	2p Information desk (2:00) @ Medical Center North Hospital B	10a Information desk (3:00) @ Medical Center North Hospital B (Supervisor: Barnes, Abby B)
		3p Information desk 3pm - 6pm -(3:00) Medical Center North Hospital B : Margaret C	1p Information desk 1pm - 4pm -(3:00) Medical Center North Hospital B : Diana W	2p Information desk (3:00) @ Medical Center North Hospital B: Jessica B; Josephine C; Loretta L; Paul S	3p Information desk 3pm - 6pm -(3:00) Medical Center North Hospital B : Margaret C	10a Information desk 10am - Noon -(2:00) Medical Center North Hospital B : Kelli A
		4p Information desk 4pm - 5pm -(1:00) Medical Center North Hospital B : Carrie B	2p Information desk (2:00) @ Medical Center North Hospital B	4p Information desk 4pm - 7pm -(3:00) Medical Center North Hospital B : Patricia H		3p Information desk 3pm - 7pm -(4:00) Medical Center North Hospital B : Isabel R
			4p Information desk 4pm - 7pm -(3:00) Medical Center North Hospital B : Edward O	4p Information desk 4pm - 5pm -(1:00) Medical Center North Hospital B : Carrie B		4p Information desk 4pm - 7pm -(3:00) Medical Center North Hospital B : Michael H

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.

✓ Hospital B/Information desk	Elfrieda R	Hospital B	11/12/2025 01:00PM	
✓ Hospital B/Information desk	Lynn L	Hospital B	11/12/2025 01:00PM	
✓ Hospital B/Information desk	Diana W	Hospital B	11/12/2025 01:00PM	
📅 Hospital B/Information desk		Hospital B	11/12/2025 02:00PM	Still needs 3
✓ Hospital B/Info Desk Volunteer Team	Edward O	Hospital B	11/12/2025 04:00PM	

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 ? Online

Job: Information desk (dropdown) Job description override: _____

Location: Hospital B (dropdown)

First date: 11/11/2025 Last date: 02/28/2026 Start time: 2pm (2pm) Duration: 3 (hours)

People needed: 5 (dropdown) Days of week: xThursday (dropdown) Weeks: xEvery (dropdown) Months: _____ Max waitlist: _____

Supervisor: _____ Job tags: _____

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 (magnifying glass icon) **Cancel** (stop icon)

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

Note: Yellow fields are required. Light blue fields only apply if these slots are being used for self-signup on VSys Live and should not be immediately available.

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.

Job	Location	Supervisor	↑ Date	Start	Duration	Delete/cancel	Status	Details	Client	Count	Taken	Needed	Waitlisted
Information desk View	Hospital B		11/13/2025	02:00 PM	3:00	(unchange)	Partially filled	Smith, Paul M View Bojorquez, Jessica E View Longwell, Loretta D View Corona, Josephine H View Get one-click link Test person		5	4	1	0

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.

Job	Location	Supervisor	Day	↑ Date	Start	Duration	Future dates	Count	Taken
Information desk Edit/assign volunteer	Hospital B		Tue	11/11/2025	02:00 PM	2:00	11/18, 11/25, 12/02, 12/09, 12/16	3	0

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.

Recurring slot

Job: Information desk, Location: Hospital B

Date: 11/11/2025, Start time: 2pm, Duration: 2 (hours)

Assign volunteer: Lee, Joanne G

Earliest assignment: 11/11/2025, Assign through: 12/16/2025

Recurring assignment: Tuesday 02:00 PM-04:00 PM (2:00), 11/11/2025, 11/18, 11/25, 12/02, 12/09, 12/16

Prevent bulk/automatic extension

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.

Extending slots and assignments

Best practice: Make your assignments out for a year, unless you know it's a shorter period. There are tools to extend them out automatically. Please talk to our support people if you need to verify those are in place. There are also manual tools for doing this. Even manually, you don't want to extend them a lot more than a year.

- **Extend recurring slots**
- **Extend recurring assignments**

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