Volunteer Scheduling System

System Description

The FSFB Volunteer Scheduling System is designed to easily handle the complex task of managing jobs and associating them with volunteers. Volunteers sign up for jobs using a website or text messages, which are described in another document. This document describes the administrative portion of the website that handles:

- Creating a list of jobs and assigning them to groups
- Replicating a job for future dates
- Assigning volunteers to specific jobs
- Sending messages
- Replicating jobs

Note: This document describes the use of sub-jobs, which was a fine way to break up a large job into departments when all of the jobs started at the same time. That is no longer the case on Saturdays, as we have Donations starting at 8:30, Transport starting at 9:00, and Clients starting at 9:30. The major issue is that a volunteer is only allowed to sign up for 1 shift per job, and we often have volunteers signing up for both Donations and Clients. As a result, we have 3 primary-jobs with no sub-jobs. This manual has not been re-written to remove sub-jobs, but all of the concepts are the same.

Accessing the System

To access the administrator Volunteer Scheduling web page:

- Log into the FSFB web site
- Click on the **Schedule Details** app

Alternately:

- Log into the FSFB website
- Click on the **Volunteer Scheduling** app
- Click on one of the date fields in the list of available job dates

- You now see the primary-jobs and sub-jobs that were assigned to that date. You can expand/contract the information for any day by clicking on the +/- symbol next to the job title (which is “Saturday” in this example).



02/07 Tuesday			
02/09 Thursday			
02/11 Saturday			
	02/11 Store		
		02/11 Front Desk/Co-Team Leader (1/1)	Jennifer Pincus
		02/11 In-Store Mover (1/3)	David Evans-Brown
		02/11 In-Store mover (teen) (0/2)	
		02/11 Sorter and Help Clients Pack Items (1/2)	Ursula D'Angelo
		02/11 Store Assistant (1/6)	Tina Lurz-Osterhaudt
		02/11 Store Assistant (teen) (0/4)	
		02/11 Team Leader (1/1)	Sue Waudby
	02/11 Transport		
		02/11 Transport Assistant (0/2)	
		02/11 Transport Driver (1/1)	Mike Dameri

  In this case, “Saturday” has 2 sub-jobs named “Store” and “Transport,” and each of them has a series of jobs that volunteers can sign up for. The “Transport” job has 2 volunteer-jobs which are “Transport Assistant” for which has 0 out of 2 job slots filled and “Transport Driver”, which has Mike Dameri signed up for the single job slot.

  If you click on any of the job titles (i.e. “Saturday”, “Store”, “Transport”, “Transport Assistant”, etc), the system shows you information about that job.

  There are 3 types of jobs: primary-jobs, sub-jobs, and volunteer-jobs.
  - Primary jobs are the top-level job, and volunteers can only sign up for 1 volunteer-job within them.
  - Sub-jobs are things like “Store” and “Transport” which are used to group jobs together.
  - Volunteer-jobs are jobs that volunteers can sign up for.

Sending e-mail or text messages to volunteers

One of the most common tasks is to message volunteers to see if they are available to work on a specific day. Unfortunately, it feels like we’re always asking people to sign up, so we’ve made it as easy as possible to communicate our needs and for them to sign up.

If you click on a job title, you will be taken to a screen that shows all of the jobs associated with it. I.E. If you click on Saturday, it shows Store and Transport sub-jobs and the volunteer jobs

associated with those 2 sub-jobs. If you click on Store, it only shows jobs associated with the Store.



Ignoring the top 1/3 of the page, it shows you job names, (the number of volunteers requested), and the volunteers who have signed up for the job. At the bottom of the page, it shows you volunteers who are available but haven’t signed up and then a list of volunteers who are not available.

To send a message to volunteers, click on the **Send Message** button at the bottom of the screen. You will then see a screen like this:



The first set of checkboxes allows you to select who you want the message to go out to. Volunteers can have 4 different statuses:

- Available - they have marked themselves available for that primary-job, but haven't selected a job.
- Not Available - they have marked themselves as unavailable.
- Unknown - they haven't marked themselves as available, not available, or signed up for a job.
- Signed up - They've signed up for a job within that primary job.

By default, the **Available** and **Unknown** boxes are checked. If you want the message to only go to people who have already signed up, clear the other boxes and check the **Signed up** box.

The next set of checkboxes indicates the groups to whom you want to send the message. There are checked boxes next to every group who can sign up for a job. Feel free to clear any check boxes to narrow down to whom your messages are going. When you're ready, click on the "Find Volunteers" button. You will then see a screen that allows you to select specific volunteers and enter your message text.



In this case, I cleared all of the groups other than Transport Assistant. All of the volunteers who are part of the Transport Assistant group and were available or had an unknown availability are shown. Clear individual check boxes if you know that someone isn't available, or click on **Clear All** to clear them all.

Enter the subject of the e-mail message and then the body of the e-mail message below that. Do not include a salutation, as "Hello [first_name] will be added to your text". Under the "Email Message" box, you will find 3 check boxes:

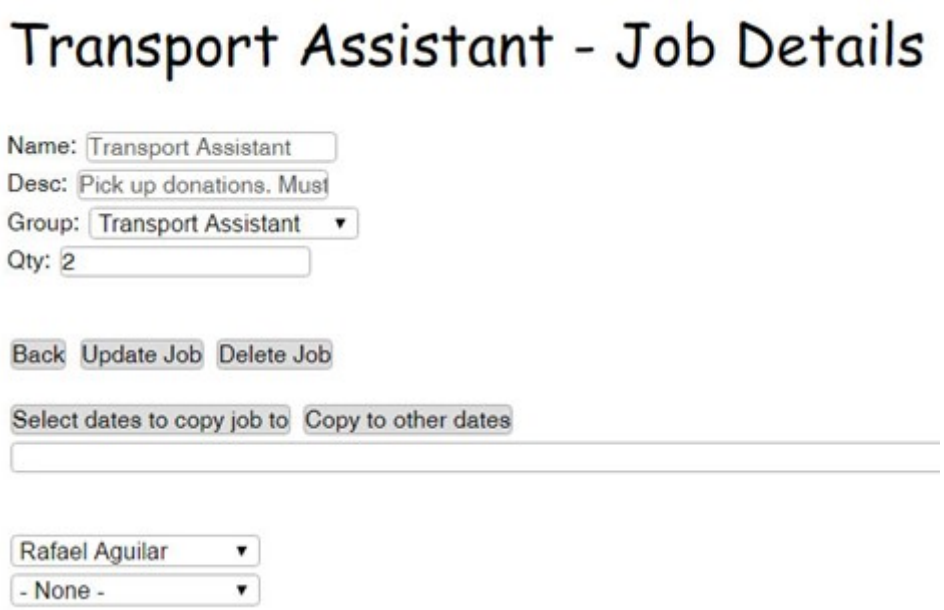
- **Include link to mark as available** includes the following at the bottom of the email.
  - I am available or I am NOT available to volunteer on [Date/time].
- **Include link to view schedule** includes the following at the bottom of the email:
  - View my schedule
- **Message contains HTML** (which is not shown above) is used if you're embedding HTML into your message. Pro use only.

When you're done, click on the **Send Email** button.

Similarly, enter the text that you want to send as an SMS text message in the "Text Message" box and click on **Send Text Message** to send the message.

Signing-up or cancelling volunteers

If you want to directly sign-up or cancel volunteers for a specific job, click on that job's name. In the following example, I clicked on "Transport Assistant".



In this case, we want 2 volunteers (as shown in the Qty field) for this job and as a result, there are 2 pull-down boxes shown directly above this text. Rafael is signed up for 1 slot, and the other is unassigned.

- To cancel a volunteer, select "- None –" from the list of available volunteers.
- To sign someone up, select their name from the list.

Note that signing-up or canceling occurs immediately upon making a selection, and the volunteer will receive a message notifying them of the change.

Creating a Primary Job

A Primary Job is the top-level job that you see on the scheduling system. Typically these are the Tuesday/Thursday/Saturday jobs, but we may create them for special events. To create a primary job, go into the scheduling system, and at the bottom of the page you'll see a button labeled "Add a new job". Click on that and a job titled "New job" will appear at the top of the list of jobs. It will have today's date. Click on that job and a page will display titled "New job – Job Details". Follow the procedure below to update it.

- Change the name to whatever describes the job best.
- Typically we leave the Description field blank.
- Click on the Start Date field and change it to whatever date this job will occur on.
- Click on the Time field and change it to the starting time.
- Click on the duration field. Due to technical issues, this field displays as a time, starting at 12:00 AM, which means 0 hours. Ideally, this would display 00:00, but it doesn't. If you want a job to last for 3 hours, change it to 03:00 AM.
- If this job will have client appointments associated with it, set the maximum number of client appointment slots that you want per hour. You can disable individual appointment slots later.
- Change the Job Owner field (not shown) to whoever should get signup/cancel notices.
- Press **Update Job**

Client Appointment Slots

If you created a primary job with client appointment slots, you will see a display similar to the following:

Client Appointments:

Time	Client Name	Notes	Action
09:15	Rodriguez, Carlos (ES)		Cancel Appt
09:15	Rivera, Pedro (EN)	Scheduled by client	Cancel Appt
09:15	*** Disabled ***		Enable Slot
09:15	*** Disabled ***		Enable Slot
10:15	Feliciano, Jennifer (EN)	Scheduled by client	Cancel Appt
10:15	Beliard, Valentina (EN)	Scheduled by client	Cancel Appt
10:15	*** Disabled ***		Enable Slot
10:15	*** Disabled ***		Enable Slot
11:15	*** Disabled ***		Enable Slot

The buttons in the Action column allow you to:

- Cancel Appt - Cancels the client's appointment
- Disable Slot - Makes the slot unavailable
- Enable Slot - Makes the slot available

Creating a Sub-job

Sub-jobs are jobs underneath of a Primary-Job which break functionality into groups. For example, within the Tuesday master job, you'll see Store and Transport sub-jobs. By clicking on those sub-jobs, you can send messages to just people within that sub-job. To create a sub-job:

- Click on the primary-job (i.e. Tuesday)
- Click on the **Add Sub-job** button
- You will see a display of all of the jobs, and you'll see "New sub-job" underneath that.
- Change the Name of the sub-job to something descriptive.
- Typically the description is left blank.
- Typically the State Date, Time, and Duration fields are left alone.
- Press **Update Job**
- Your updated sub-job should appear under the Primary Job.

Creating a Volunteer-Job

A Volunteer-job is a job that a volunteer can sign up for. This is under a Primary-job or a Sub-job. To create a Volunteer-job:

- Select the Primary or Sub job that you want the Volunteer-job created under
- Click the **Add volunteer job** button
- You'll see "New volunteer-job" appear under the job that you selected above.
- Click the New volunteer-job
- A page titled "New volunteer-job – Job Details" will appear
- Update the Name to something descriptive
- Put in a Description that describes what the volunteer will be doing. This description will be displayed when the volunteer receives an e-mail/text-message telling them about their job and will be preceded by the text "...where you'll [description]". As a result, the description should not start with a capital letter.
- On the Group pull-down, select the group who may sign up for this job. If you want everyone to be able to sign up for it, select Any Group.
- Update the Qty field to reflect the number of people who can sign up for the job.
- Press **Update Job**.

Deleting a Job

To delete a Primary/Sub/Volunteer-job:

- Select the job that you want to delete from the list of jobs. You may have to click on the +/- symbol to see the sub/volunteer-jobs.
- If you are selecting a Primary or Sub-job, all of the jobs underneath of it will be deleted. Be sure that you are on the correct level.
- Click on the **Delete Job** button.

- A dialog box will pop up asking you if you're sure that you want to delete job X. If you're positive that you want to do this, click Yes, otherwise, click **Cancel**.
- If you clicked **Yes**, the job and any sub-jobs will be deleted.
- If this was a Primary job, all of the volunteer availability information associated with it will be deleted.

Replicating a Job

On a monthly basis, we typically replicate the jobs from the previous month. This involves selecting a single Tuesday, Thursday, and Saturday job and copying it to the following month. For example, if I want to copy a Saturday job, I would select one of the Saturday primary-jobs and then press **Select dates to copy job to** button.

A calendar then appears as shown to the right. Click on the dates that you want to copy the job to. The dates selected are listed above the calendar. Press the **Copy to other dates** button to copy the job.

***** Note that something strange happens after you click on 2 dates in the next month. The Calendar changes back to the current month. I don't know why, but you do need to be careful with what dates you pick ***.**

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