

These instructions are for use by Work Assignment Coordinators and describe how to use the programs developed to assist in the work assignment process for each Quarterly Meeting.

Work assignments are typically done on the Tuesday or Wednesday preceding Quarterly Meeting, so that the pool of registrants is as large as possible.

1. Start by logging into the system at <https://pnqm.org/registration/specialReports.html>. Login using your Work Coordinator email address and password.

Special Reports

Email Address:

Password:

forgot password

Once logged into the system in the role of Work Assignment Coordinator you will see the following display.

Special Reports Administration			
Report Name	Option		When To Run
Initialize work requirements	force reset <input type="checkbox"/>	<input type="button" value="Run"/>	Run prior to making work assignments. Check "force reset" to re-run.
Make/edit work assignments		<input type="button" value="Run"/>	Run to edit work assignments. May be run before <i>and</i> after "Auto-assign work".
Auto-assign work		<input type="button" value="Run"/>	Run to automatically assign unfilled work positions, based on registration selections.
View work auto-assignment log		<input type="button" value="Run"/>	Run to display the log created by the last auto-assignment run.
Display notes	note type: all ▼	<input type="button" value="Run"/>	Run as needed to review registrant notes.

2. Click Display notes with "all" selected.
3. In a new browser window login again to the special reports list and click Initialize work to set the system for a fresh start of assignments. [You can test the system before actually using it for the final assignments, and then start fresh in the manner described.]
4. Update all of the rows of the work assignment sheet that have "pre" or "host" in the "Preset" column with the names of individuals assigned to those tasks. Many of those rows will still contain assignments from the previous Quarterly. Assuming that the "roles" table is up to date, you should open that report in another window and assign the current role holders in the work assignments sheet. Next obtain worship group leader names from the WG Coordinator and fill those names into the work assignments page in the job marked WGL in the "pre" rows. [The best way to properly assign a registered person to a work position/slot is to click on the drop-down arrow at the right end of the "Assignee" column and select the person from the list of registered individuals.] Clear any "pre" or "host" row assignments that do not pertain to the current Quarter.

5. Review the notes displayed in the other browser window and manually assign work if there are specific requests that might not be handled automatically. [See step 7, below, for explanation of how to use that display form.]

6. Click the "Auto-assign work" Run button to automatically attempt filling any open spots. That will result in a listing of information about the assignments that have been made, job positions that could not be filled, and people who are still unassigned. This "assignment log" may be viewed independently by clicking the "View work auto-assignment log" Run button. Here is an example of the log:

done
109 jobs assigned

Unassigned adults:

Name	Age	Job Choices	Time Choices	Notes
Anne Laird	60	AA AA	AA AA	Job Note: I will be helping with registration but I am open to help at other times too.
Beverly Mendheim	60	UN UN	U U	
Carolyn Laskowski	70	AA AA	AA AA	
Deric Young	60	AA AA	AA AA	
Jerry Evergreen	60	UN UN		Mobility Note: I use a wheel chair and we will park the car behind the dining hall during the day and near lodging for the night. I can use the paths as they exist.

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Assignments:

Registration email & Ind ID	RegName	First Name	When	JobID	TimeID	Job Choices	Time Choices	Notes
judylackey@gmail.com 2	Sorrelgreen	Ethan	Saturday AM 08:30 - 10:25	CPCN	PS	CPCN SU	Bus PS	
initiative650@gmail.com 3	Smith	Rick (Coate)	Saturday AM 08:30 - 10:25	CPCY	PS	CPCY AW	AT Bus	
jedroach@uw.edu 1	Hopkins	Jared	Saturday AM 08:30 - 10:25	CPE	PS	CPE CPP	WG PS	
jedroach@uw.edu 2	Hopkins	Colleen	Saturday AM 08:30 - 10:25	CPE	PS	CPE CPP	WG PS	prefer late morning
laurel070@gmail.com 1	Boyajian	Laurel	Saturday AM 08:30 - 10:25	CPE	PS	CPE CPP	Bus PS	

7. Next "sanity check" the automatic job assignments. Scan through the assignments log looking for cases where a person has been assigned a role that (based on their job/time choices and note) seems inappropriate, and take note of those cases.

The job and time codes are "almost" self-explanatory. The recommended way to scan the Assignments log for problems is to look at the individual's job and time choices compared to the job and time assigned to determine if the assignment is consistent with the request. Here is a list of codes for reference:

Job Codes

- AW Anywhere I am needed
- CPP Childrens Program Preschool
- CPEN Early Elementary - No Hike
- CPEY Early Elementary - Hike OK
- CPUY Upper Elementary - Hike OK
- CPUN Upper Elementary - No Hike
- CPCY Central Friends - Hike OK
- AA Already Assigned
- CPCN Central Friends - No Hike
- JFOC Jr Friends Overnight Chaperone

- JFAP Jr Friends Friendly Adult Presence
- WGL Worship Group Leader
- MED MED: Doctor, Nurse, Paramedic, etc
- SAT Early Sat. a.m. Ridgeview clean up
- AC Assist at Friday Check-In
- SU Set up meeting room chairs and tables
- SC Sunday cleanup - stack tables/chairs
- Oth Other - Describe in note area
- QS Quarterly Meeting Staff
- UN Unable to contribute this time
- CPA Childrens Program Any Group
- CPI Childrens Program Infants and Toddlers

Job Time Codes

- AT Any Time I'm Needed
- PS During Plenary Session
- WG During Worship Groups
- Bus During Business Meeting
- IG During Interest Groups
- MW During Meeting for Worship
- F During Unscheduled Times
- NPS Not during Plenary Session
- NWG Not during Worship Groups
- NBus Not during Business Meeting
- NIG Not during Interest Groups
- NMW Not during Meeting for Worship
- AA Already Assigned
- U Unable
- CNote See Notes about job time

8. Next return to the "Make/edit Work Assignments" Run button. That will open a new window showing the list of job positions and who is currently assigned.

Edit Work Assignments

Day	Time	JID	#	Job Description	Preset	JTID	Avoid JTID	Assignee	FamCode in current registrations	ID		
Friday	PM 05:00 - 10:00	AC	1	Assist with Friday Check-in		F		Bee, Jessica	myclovershade@yahoo.com	1	Update	Clear
Saturday	AM 07:00	SAT	1	Ridgeview Cleanup		F		Milliron, Valerie	vmilliron@csuchico.edu	1	Update	Clear
Saturday	AM 07:00	SAT	2	Ridgeview Cleanup		F		CORNWELL, Dorene	dorenefc@gmail.com	1	Update	Clear
Saturday	AM 07:15	MSET		Job ID, e.g. SU, CPE, .. Sat Breakfast		F		Brown, Elisabeth	epbrown39@gmail.com	1	Update	Clear
Saturday	AM 07:15	MSET	2	Meal Set Up - Sat Breakfast		F		Davidow, Jenny	jjdavidow@gmail.com	1	Update	Clear
Saturday	AM 08:30	MCLN	1	Meal Clean Up - Sat Breakfast		F		Metcalf, Ron	Met_alf42@gmail.com	1	Update	Clear
Saturday	AM 08:30	MCLN	2	Meal Clean Up - Sat Breakfast		F		Bernstein, Peg	pegbernstein@gmail.com	1	Update	Clear
Saturday	AM 08:30 - 10:25	CPA	1	Children's Prog - Floater		PS		Murphy, Kathe	murph@netw.com	1	Update	Clear
Saturday	AM 08:30 - 10:25	CPCN	1	Children's Prog - CF no hike		PS		Sorrelgreen, Ethan	judylackey@gmail.com	2	Update	Clear
Saturday	AM 08:30 - 10:25	PCPY	1	Children's Prog - CF hike ok		PS		Coate, Rick (Smith)	initiative650@gmail.com	3	Update	Clear

a) Scan down the list to locate any unfilled job positions. If a position has not yet been filled the Assignee column will be blank. (Ignore rows where the "Preset" column has content.) If there are unfilled positions proceed as follows:

b) In each row where there is no assignee and no Preset click the drop-down selector to view a list of people not yet assigned. In the following example the yellow-highlighted Assignee drop-down was clicked.

Edit Work Assignments

Day	Time	JID #	Job Description	Preset JTID	Avoid JTID	Assignee	FanCode in current registrations ID		
Friday	PM 05:30 - 06:00	RSC 1	Ridgeview Potluck Set-up/Cleanup	host				v	
Friday	PM 05:30 - 06:00	RSC 2	Ridgeview Potluck Set-up/Cleanup	host				v	
Friday	PM 05:30 - 10:00	AC 1	Assist with Friday Check-in	F	Bee, Jessica			v	
Saturday	AM 07:00	SAT 1	Ridgeview Cleanup	F	Millron, Valerie			v	
Saturday	AM 07:00	SAT 2	Ridgeview Cleanup	F	CORNWELL, Dorene			v	
Saturday	AM 07:15	MSET 1	Meal Set Up - Sat Breakfast	F	Brown, Elisabeth			v	
Saturday	AM 07:15	MSET 2	Meal Set Up - Sat Breakfast	F	Davidow, Jenny			v	
Saturday	AM 08:30	MCLN 1	Meal Clean Up - Sat Breakfast	F	Metcalf, Ron			v	
Saturday	AM 08:30	MCLN 2	Meal Clean Up - Sat Breakfast	F	Bernstein, Peg			v	

Unassigned Adults

Ayala, Shiloh	
Boysjan, Polly	
Burgevin, Linnee	
Ewell, Tom	
Farnsworth, Evan	
Gabriel, Sea	
Gotts, John	
Graves, Jeannie	
Hubert, Katherine (Dsterling)	
Keet, Kathryn	
Laird, Anne	
McFarland, Jill	
Mendheim, Beverly	

c) Locate the listed people in the auto-assignment window Unassigned list, and determine based on their registration choices (in the Unassigned Persons list in the auto-assignment log) if they are suitable for the position.

d) When a suitable candidate is found, select them from the Assignee drop-down selection list and click the "Update" button to record the assignment.

9. If you find inappropriate work assignments, when scanning the "Assignments" list, locate the row in question and click "Clear" to move the assignee into the "unassigned" pool. Then select an alternate from the drop-down selection list and click "Update".

10. If the auto-assign function made what you consider to be obvious mistakes, report the issue to John Gotts, or whoever is currently the web master for PNQM.

Q&A

Q: Should I ever click the Initialize Work Assignments "Run" button?

A: ONLY click that button (plus check the box to affirm click) if you want to RESET the work assignments to their original state – essentially to "start over". Note: new work coordinators might wish to initially "play" with the system to get a sense of it. In that case you might want to reset it after the playing is done in preparation for making actual assignments.

Q: When should the Auto-assign Work "Run" button be clicked?

A: You should do that at the start to make initial job assignments. You may also safely click that Run button after other edit activity has occurred to let the system attempt to fill any remaining unassigned slots from the still unassigned pool.

Q: If I use Make/Edit Work Assignments and click the Update or Clear button after each change, will those changes remain without any other "save" action?

A: Yes

Q: What if the base work assignment list needs to be modified?

A: The co-registrars, software manager and setup person all have access to two further options that permit modifying and saving the work schedule. Those modifications may be made after work assignment activity is already in progress without affecting the existing work assignments – as long as no “Run” is done to (re)Initialize Work Assignments.

Q: When is the right window of time in which to make work assignments?

A: Make assignments 5 to 8 days before the start of Quarterly Meeting. That makes a large pool of registrants available from which the auto-assignment can fill as many slots as possible. Do not make assignments after the Tuesday preceeding Quarterly because the registrar might be making family schedule print outs on Wednesday or Thursday of that week.

Q: What about making meal setup/cleanup assignments for worship groups?

A: That task is left up to the worship group coordinator.