

Vision Computer Programming Services, Inc. 801 2nd Street North, Suite A Safety Harbor, FL 34695 888-425-6964 <u>email@visioncps.com</u> <u>www.visioncps.com</u>

# **Activity Scheduling Basics**

Each day for the last 5 days of the month you will receive the following notification when you open the Member Tracking System.

If the message says there are 0 Activities scheduled at your Unit then you MUST schedule them per the blue text on the above screen.

Activities should be scheduled on the Activity Calendar on a Month to Month basis per the blue text on the above screen.

tivity S	Schedule Advisory					
	There are 3 days remaining until Next Month.					
	There are 0 activities scheduled at Unit 01 next month.					
	There are 0 scheduled activities for the entire Organization next month.					
	Would you like to Schedule Activities now?					
	NOTE: Activities MUST be scheduled in order to track members' attendance, programs and staff/volunteer hours.					
	It is recommended that all activities are scheduled on a month-to-month basis.					
	☐ Don't warn me about scheduling activities again until next month					
	☐ Don't warn me about scheduling activities again until next month					

Click Yes above to go directly to the Activity Calendar screen as seen below

Click No above to get to the Main Menu if you have already scheduled your activities for the month

If you click Yes and still need to schedule activities then:

From the Main Menu click on the Activities button You will see the following:

Sunday	Monday	Staff Tuesday	Wednesday	Activities Thursday	Friday	Saturday
Sunday	monuuj	Tuesday		1	2	3
					1	1
	-	-	-	-	-	
	5	6	ľ	8	9	10
I	12	13	14	15	16	17
3	19	20	21	22	23	24
5	26	27	28	29	30	31
	1	1		1	1	1

Click on the Schedule Activities button on the bottom left corner

### and you will see the following:

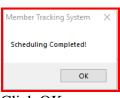
3 Schedule Activities Single Activity Scheduling Multiple Activity Scheduling	8
Unit Code: 01 - Downtown Unit	Please click on the blue question mark below to read the instructions on this feature. Session Times: Start End
Comment:	Record: H < 1 of 1 # H >> 1/4 No Filter Search
	Filter by Staff Unit Code: All> ✓     Filter by Staff Unit Code: All> ✓     Show Active Staff Only (Based on Employment End Date)     P Do not show volunteers
Schedule Activity	Clear Staff List Close

Fill in the form to look like the below:

NOTE: First Sched. Date is the first date of the month you want to track the activity NOTE: or Thru this end date: is the last date of the month you want to track the activity

ingle Activity Scheduling Multiple Activity Schedulin	ng	
Unit Code: 01 - Downtown Unit	~	Please click on the blue question mark below to read the
Activity: General Attendance	(this activity DOES require a Parent/Guardian for	instructions on this feature.
Location: Front Desk	v pickup)	Session Times:
Attendance method: In/Out		Start End
		► 2:30 p 7:30 p
Comment:		
First Sched. Date: 03/01/2018 ()		
Select ONE of the following 3 options:		Record: H
Select ONE of the following 3 options:	/2018	Record: H < 1 of 1 > H > K No Filter Search
		Staff Person(s)
C Schedule Activity to occur once on 03/01/ € Schedule Activity to occur once on 03/01/	Tue קד Wed קד Thu קד Fri קSat If this activity occurs on	Staff Person(s)
<ul> <li>C Schedule Activity to occur once on 03/01/</li> <li>C OR Repeat Activity Daily □ Sun ☑ Mon</li> </ul>	Tue ⊽Wed ⊽Thu ⊽Fri ⊤Sat If this activity occurs on more than 1 day per month, then choose	Staff Person(s)
C Schedule Activity to occur once on 03/01.     OR Repeat Activity Daily □ Sun ☞ Mon     This many more times: 1     or Thru this end date: 03/30/201	The FTue FWed FThu FFri ⊢Sat If this activity occurs on more than 1 day per month, then choose Repeat Activity Daily IOR	Staff Person(s)
C Schedule Activity to occur once on 03/01/     OR Repeat Activity Daily □ Sun □ Mon     C This many more times: 1	n F Tue F Wed F Thu F Fri F Sat If this activity occurs on more than 1 day per month, then choose Repeat Activity Daily Repeat Activity Monthly and fill in the	Staff Person(s) ★ Filter by Staff Unit Code: <ai> ✓ Show Active Staff Only (Based</ai>
C Schedule Activity to occur once on 03/01     OR Repeat Activity Daily 「Sun 戶 Mon     This many more times:     or Thru this end date:     O3/30/201     OR Repeat Activity Monthly Thru	The FTue FWed FThu FFi ⊢ Sat If this activity occurs on more than 1 day per month, then choose Repeat Activity Daily CR Repeat Activity Monthly	Staff Person(s)

Click on the Schedule Activity button and you will see the following:



## Click OK

Repeat the process for any other activities that you would like to track

Click Close button on the bottom right of the Schedule Activities screen and you will see the following:

	aff   <all></all>	Staff		Active Location	,	🗸 Mar 2018 🗸 🖣
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 2:30 p GenAtten 3:00 p Snack PM	2 2:30 p GenAtten 3:00 p Snack PM	3
	5 2:30 p GenAtten 3:00 p Snack PM	6 2:30 p GenAtten 3:00 p Snack PM	7 2:30 p GenAtten 3:00 p Snack PM	8 2:30 p GenAtten 3:00 p Snack PM	9 2:30 p GenAtten 3:00 p Snack PM	10
1	12 2:30 p GenAtten 3:00 p Snack PM	13 2:30 p GenAtten 3:00 p Snack PM	14 2:30 p GenAtten 3:00 p Snack PM	15 2:30 p GenAtten 3:00 p Snack PM	16 2:30 p GenAtten 3:00 p Snack PM	17
8	19 2:30 p GenAtten 3:00 p Snack PM	20 2:30 p GenAtten 3:00 p Snack PM	21 2:30 p GenAtten 3:00 p Snack PM	22 2:30 p GenAtten 3:00 p Snack PM	23 2:30 p GenAtten 3:00 p Snack PM	24
25	26 2:30 p GenAtten 3:00 p Snack PM	27 2:30 p GenAtten 3:00 p Snack PM	28 2:30 p GenAtten 3:00 p Snack PM	29 2:30 p GenAtten 3:00 p Snack PM	30 2:30 p GenAtten 3:00 p Snack PM	31

And then you will be able to scan your Members for the General Attendance activity for the time frame that has been scheduled.

This procedure MUST be performed by ALL Units in an Organization EVERY month.

User Names are attached to a default Unit so each time you open the program you are opening to that unit and don't have to change the unit on each screen.

Users						
□ Show users from all sites Find Login Name: Nicole	Find Last Name: Dommer, Nicole					
General Unit Permissions Security User Events User Messages User Message Configuration	Custom Field Permissions					
Login Name: Nicole Last Name: Dommer	HELP? See the Help button below!					
	ally log-in into MTS. Not allowed for System user.)					
NOT RECOMMENDE	D for use on shared computers!					
Default Unit Code:01 - Downtown Unit	The Default Unit code is the Unit that will show on the screens when you first open them					
Open Directly to Quick Entry On Sign-In (provided the User has permission for Quick Entry!) User Security Group (optional):     Groups						
Sending Email via SMTP						
Server: Authenticate: No 🗸						
Use SSL: No 🗸	Send Test Email					
Password: Port#. 20						
NOTE: It is highly recommended that every user of the Member Tracking System have their own User Name and Password and that each person use their own User Name. Each item that is added, deleted, changed or any event that occurs is tracked by User Names.						
Add User Delete User Change User Name Change Password U	Jndelete a User Close Close					

If your unit does not have activities scheduled for the upcoming month then you will need to schedule activities in order to track attendance for any activity.

### NOTE:

Some people opt to schedule the activity for a year or more and then at the end of that year there is nobody around that knows how to schedule the activities and we will answer the how and why at that time.

### TIPS FOR SUCCESS:

- 1. Schedule Activities for only 1 month at a time
  - a. Performing this action monthly will reinforce your product knowledge
  - b. Always involve 2 Member Tracking System users during this quick monthly task
- 2. Immediately act upon notification messages
  - a. Adding activity schedules takes about 2 minutes to perform
  - b. Adding activities when notified ensures trouble free operation each and every month