

Volunteers Guide

11/14/2014 Blackbaud CRM 4.0 Volunteers US

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Volunteers-2014

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Volunteers Configuration

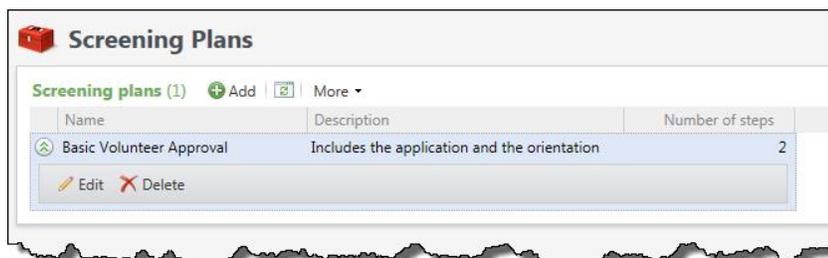
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Before you can manage volunteer information, we recommend you set up the configuration options. From *Volunteers*, you can access these options under **Configuration**. For example, you can create volunteer types to allow users to match your volunteers to volunteer opportunities.

Screening Plans

A screening plan is a list of steps a volunteer must complete in order to work a specific job. If your organization requires volunteers to complete a screening process, you can define multiple screening plans. You can associate screening plans with volunteer types. A screening plan may be very simple and contain only one required step, or it may be very detailed and contain multiple steps. For example, the screening process for a basic volunteer may include only two steps: one, that the volunteer completes an application, and two, that the volunteer attends a basic orientation session.

The Screening Plans page contains a list of all available screening plans. On this page, you can add new volunteer screening plans and define the steps to complete the screening plan. You can edit and delete existing screening plans as needed.



Add Volunteer Screening Plans

If your organization requires volunteers to complete a screening plan, you can define screening plans and associate them with specific volunteer types. A screening plan is a list of steps a volunteer is required to complete to be eligible for a specific job within your organization. You can define multiple screening plans for your various volunteer types.

Note: You can associate a screening plan with a volunteer type when you add or edit the volunteer type.

To add a screening plan, from *Volunteers*, click **Screening Plans** under **Configuration** and then click **Add**.

Note: You can set up screening plan steps on the Code Tables page in *Administration*.

Edit Volunteer Screening Plans

After you define a screening plan for a specific volunteer type, you can edit it as necessary. To add or remove screening plan steps or edit details about the steps, use the Edit Screening Plan screen. On the Screening Plans, select the plan and click **Edit**.

Note: You can set up screening plan steps on the Code Tables page in *Administration*.

Delete Volunteer Screening Plans

After you add screening plans, you can delete a screening plan as needed. On the Screening Plans page, you can select a screening plan to delete.

Note: When you delete a screening plan, a message indicates whether the selected screening plan is currently associated with an active volunteer type. You can still delete the plan, but it will be removed from the volunteer type. If any volunteers are assigned to the screening plan, it will be removed from their volunteer records.

Volunteer Skill Levels

The Volunteer Skill Levels page contains a list of all available volunteer skill levels. On this page, you can add new skill levels and assign a rank to each them.

Note: When you rank skills by levels, you should always rank the more basic skill levels lower. If "Basic Spanish Language Skills" is ranked as a 1, you can then have "Advanced Spanish Language Skills" as a 2 or higher. When volunteer matching occurs, it is assumed that if a volunteer matches a higher number (higher level) skill, the volunteer also matches the skill levels below that.

When you assign a trait with a type of "Skill" to a volunteer, you can use the skill levels you define to indicate the volunteer's level of ability for that skill. You can edit and delete existing skill levels if needed.



Description	Rank
Basic or Conversational Spanish	1
Advanced Spanish	2
Fluent Spanish	3

Edit and Rank Volunteer Skill Levels

When you add traits for a volunteer, you can define skill levels to indicate the amount of experience a volunteer has for a specific skill type. From *Volunteers*, click **Skill levels** under **Configuration**. The Volunteer Skill Levels page appears. To manage available skill levels, click **Edit and Rank**. The Edit and rank skill levels screen appears.

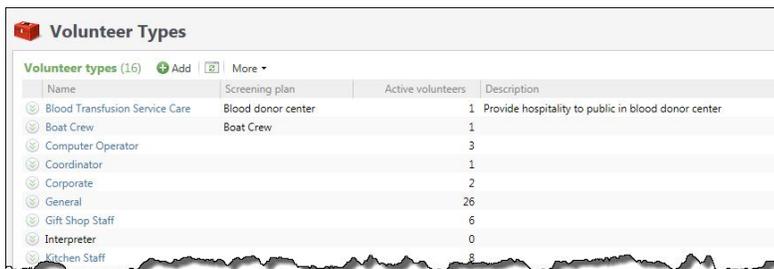
- To add a new skill level, scroll to the bottom of the screen. In the blank row, enter a name to describe the new skill level.
- To edit a skill level, select the row to edit and enter new text.
- To delete a skill level, select the row and clicked **DELETE**.
- To rank skill levels, select a skill level and use the arrow buttons to move the selected skill level up or down.

Note: When you rank skills by levels, you should always rank the more basic skill levels lower. If "Basic Spanish Language Skills" is ranked as a 1, you can then have "Advanced Spanish Language Skills" as a 2 or higher. When volunteer matching occurs, it is assumed that if a volunteer matches a higher number (higher level) skill, the volunteer also matches the skill levels below that.

Volunteer Types

A volunteer type denotes the capacity in which a volunteer can serve your organization. You can assign multiple volunteer types to a single volunteer. You use volunteer types to match volunteers to jobs.

The Volunteer Types page contains a list of all available volunteer types. On this page, you can add a new volunteer type and associate it with a screening plan. For example, a "Medical Staff" volunteer may be required to complete a screening plan which includes a CPR course. You can edit and delete existing volunteer types if needed.



Name	Screening plan	Active volunteers	Description
Blood Transfusion Service Care	Blood donor center	1	Provide hospitality to public in blood donor center
Boat Crew	Boat Crew	1	
Computer Operator		3	
Coordinator		1	
Corporate		2	
General		26	
Gift Shop Staff		6	
Interpreter		0	
Kitchen Staff		8	

Add Volunteer Types

If your organization uses volunteer types to manage which volunteers are suited for specific jobs, you can define multiple volunteer types. When you define a volunteer type, you can associate it with a screening plan. After you assign a screening plan, the volunteer type requires all assigned volunteers to complete its associated screening plan.

To add a volunteer type, from *Volunteers*, click **Volunteer types** under **Configuration** and then click **Add**. You can enter a name and description for the type. You can also associate it with a screening plan, which means any volunteers of this type will need to complete the screening plan you select. For more information about how to add screening plans, see [Add Volunteer Screening Plans](#) on page 1.

Edit Volunteer Types

After you create a volunteer type, you can later edit details about that type. On the Volunteer Types page, you can select a volunteer type to edit. When you edit a volunteer type, you can change the screening plan. If a volunteer is already associated with a screening plan, you can still change the screening plan; however, the volunteer will retain the old screening plan and steps.

Delete Volunteer Types

After you add volunteer types, you can delete a volunteer type if needed. When you delete a volunteer type that is already associated with constituents, it is removed from their volunteer records.

Edit Screening Plan

You can view and edit the screening plan assigned to a volunteer type. In the grid, select a volunteer type and click **Edit screening plan**. For more information about how to edit screening plans, see [Edit Volunteer Screening Plans](#) on page 2.

Volunteer Awards

You can create volunteer awards to give to your organization's most dedicated volunteers. For example, you might have certificates to honor volunteers when they complete over 100 hours of service. You can create and manage the awards from the Volunteer Awards page. To access volunteer awards, from *Volunteers*, click **Volunteer awards** under **Configuration**.

Add Volunteers Awards

From *Volunteers*, click **Volunteer awards** under **Configuration**. The Volunteer Awards page appears and you can add new awards. Awards have a name and type, but can also have a description.

Note: You can set up volunteer award types on the Code Tables page in *Administration*.

Edit Volunteers Awards

After you add volunteer awards, you can edit them as needed. Editing an award that has already been assigned to a constituent does not change the award for that constituent. New awards assigned to constituents will have the change.

Note: If needed, you can set up volunteer award types on the Code Tables page in *Administration*.

Delete Volunteers Awards

After you add volunteer awards, you can delete them as needed. Deleting an award that has already been assigned to a constituent does not remove the award from that constituent. The deleted award is no longer available to assign to other constituents. From the Volunteer Awards page, select an award and click **Delete**.

Note: You can also mark a volunteer award as inactive if you no longer need it, but want to retain it. You can reactivate it later, if necessary.

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A volunteer is a person who voluntarily undertakes a task or specialized piece of work for an organization and expects no pay in return. With *Volunteers*, you can create volunteer types, define qualifications a volunteer needs to complete certain jobs, manage your volunteers' medical information and special needs, determine when a volunteer can work, and match a volunteer's special interests with a specific job. You can also create volunteer screening plans, which are checklists of tasks a volunteer must complete before he starts a job. After you have added a volunteer and created the job and job occurrence, you then match the two, and assign the volunteer to the job occurrence.

Add Volunteers

You can use the **Add a volunteer** task to add volunteers to your database. If a volunteer is a constituent in your system, you can select the volunteer from a list. This saves time because you do not have to enter all the volunteer's personal information. If the volunteer is not a constituent in your database, you must first add the volunteer as a constituent.

For more information about how to add constituents, see the *Constituents Guide*.

► Add a volunteer

1. From *Volunteers*, click **Add a volunteer**. The Add a volunteer screen appears.
When you click **Add a volunteer** and search for a specific constituent, the Non-Volunteer Search screen returns only those constituents not already categorized as volunteers.
2. In the **Record** field, click the binoculars to open the Non-Volunteer Search screen. If the constituent record already exists, search for and select the constituent. If the constituent you select is actually a household, you will be prompted to select the member of the household to add as a volunteer, as households cannot be volunteers.

If the volunteer is not a constituent in your database, on the Non-Volunteer Search screen, click **Add** to add the new constituent.
3. Enter information about the volunteer in the fields. For more information about the items on this screen, see Add a Volunteer Screen on page 6.
4. To save the volunteer information, click **Save**.

Add a Volunteer Screen

Screen Item	Description
Record	To open the Non-Volunteer Search screen and select a constituent, click the binoculars. If the volunteer is not already a constituent in your database, you can add the new constituent from the Search screen.
Name	Enter the full name of the volunteer's emergency contact. The emergency contact is not associated with an existing constituent record.
Phone	Enter the phone number of the volunteer's emergency contact.
Sponsor	If the volunteer is sponsored by an organization, you can search for the organization's record.

Search for Volunteers

After you add volunteers, you can search for a specific volunteer with the Volunteer Search screen. When you add a volunteer, you select the constituent to add as a volunteer. The search screen you use to pick the constituent is the Non-Volunteer Search screen. This screen searches for constituents who are not already volunteers. The search options on the Volunteer Search screen and the Non-Volunteer Search screens are essentially the same.

On the search screen, enter the criteria on which to base your volunteer search. For example, entering an "S" in the **Last/Org name** field will limit search results to volunteers whose last names begin with "S".

For more information about how to add a volunteer, see [Add Volunteers](#) on page 5.

Volunteer Tab

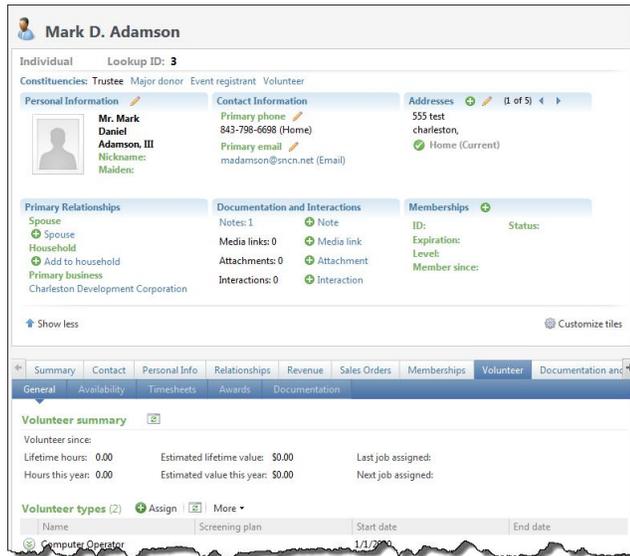
The Volunteer tab on the constituent record displays several second-tier tabs that contain information about traits, availability, volunteer types, and notes for the selected volunteer. You can add, edit, and delete information from these tabs. Access the Volunteer tab from the constituent record or by searching for a volunteer. After you have recorded all of the information for the selected volunteer, you can match and assign the volunteer to a job.

To open the volunteer schedule, click **View volunteer schedule**, under **Tasks**. On the Schedule screen, you can view current job assignments. You can assign the volunteer to jobs for which he has the necessary traits, skills, or qualifications.

General Tab

The General tab contains general information about the volunteer, such as a summary of volunteer activity, any associated volunteer types, and emergency contact details.

Under **Volunteer summary**, you can view information about the volunteer's activity with your organization for the current year and over the lifetime. The program automatically calculates these values based on the timesheets entered for the volunteer and the estimated values of the jobs as entered when you add jobs.



Under **Volunteer types**, you can view the capacity in which the volunteer can serve your organization. You use these volunteer types to match the volunteer to jobs. You can assign multiple volunteer types to the volunteer. If a volunteer type is associated with a screening plan, you can also access information about the screening plan, such as completed, failed, and pending steps; expected dates for completion; and any additional comments.

Note: For information about how to configure volunteer types for your organization, see [Volunteer Types](#) on page 3.

Under **General information**, the sponsor organization, if any, and emergency contact information for the volunteer appears. For information about how to edit this information, see [Edit General Information for a Volunteer](#) on page 9.

Under **Traits**, you see information about the different traits assigned to the volunteer or the traits associated with a specific job. Traits include skills, interests, special needs, and certifications. Here, you can add, edit, and delete trait information. You can add multiple traits for a single volunteer or job.

Using traits helps ensure volunteers are matched with and assigned to jobs for which they are capable or qualified. Volunteer traits may include special talents or certifications. Jobs requiring a particular certification or skill would also have those traits.

For a volunteer, the General tab displays the traits associated with that volunteer. On the screening plan page, the Traits tab also displays the traits associated with that volunteer. On a job page, you can manage traits needed to perform that job.

Assign Volunteer Types to Volunteers

After you configure different volunteer types, you can assign them to volunteers. You can assign multiple volunteer types to a single volunteer. For information about how to configure volunteer types, see [Volunteer Types](#) on page 3.

When you assign a volunteer type with an associated screening plan, the status of the volunteer type is automatically set to "Pending." The volunteer type becomes active when the volunteer completes all steps of the required screening plan. When you assign a volunteer type that is not associated with a screening plan, the status of the volunteer type is automatically set to "Active." For information about screening plans, see [Screening Plans](#) on page 1.

To assign a volunteer type to a volunteer, on the General tab, click **Assign** under **Volunteer types**. You can select the volunteer type, enter start and end dates, and view the name of the screening plan associated with the type.

Edit a Volunteer Type Assignment

After you assign volunteer types to a volunteer, you can edit information about the assignment such as its date range or status. You cannot edit the volunteer type selected for the assignment.

To edit a volunteer type for a volunteer, select the volunteer type and click **Edit**. You can modify the start and end dates, as well as the status of the volunteer for the type. When you assign a volunteer type with an associated screening plan, the status of the volunteer type is automatically set to "Pending." When you assign a volunteer type that is not associated with a screening plan, the status of the volunteer type is automatically set to "Active." However, you can manually update the status of a volunteer when needed. If a volunteer type is no longer valid for the volunteer, you can change the status to "Inactive."

Delete a Volunteer Type Assignment

When you delete a volunteer type assignment, you permanently remove it from the volunteer. To retain a history of the assignment when you no longer require it, you can edit the status of the assignment to "Inactive." To delete a volunteer type for a volunteer, select the volunteer type and click **Delete**. For information about how to edit the status of an assignment, see [Edit a Volunteer Type Assignment](#) on page 9.

Edit General Information for a Volunteer

After you add a volunteer, you can edit the basic sponsor and emergency contact information about the volunteer. On the General tab, click **Edit** under **General information**.

Add Traits

A trait is a characteristic a volunteer has that is needed to complete a specific job. Traits include interests, skills, courses, and certifications. You use traits to match volunteers with appropriate jobs. For example, if a data entry job requires a specific certification, you can assign a volunteer with the trait "Certificate" to that job. Traits can be required if the skill or certification is something the volunteer must have for the job.

Note: You can add traits for a volunteer from the General tab on the Volunteer tab of the constituent record. You can also add traits to each job in order to match volunteers and their qualifications with various jobs.

To add trait to a volunteer, click **Add** under Traits. For information about the fields on this screen, see [Add a Trait Screen](#) on page 1.

Edit Traits

Once you add a trait, you can edit that trait as needed. On the General tab on the Volunteer tab of a constituent record, you can select a trait to edit for a selected volunteer. On the Traits tab of a job page, you can select a trait to edit for the selected job. You can edit all fields for a trait. For more information, see [Add a Trait Screen](#).

Delete Traits

On the General tab in the Volunteer tab of a constituent record, you can select a trait to delete for the volunteer. On the Traits tab of a job page, you can select a trait to delete for the selected job. You can also edit a trait and enter an expiration date, which will not remove the trait from the volunteer or job.

Availability Tab

The Availability tab contains information about the days and times the volunteer is available. Availability is important when you match volunteers with jobs. From this tab, you can define recurrences the volunteer is available and specific instances the volunteer is unavailable.

Note: Volunteer availability information restricts which jobs a volunteer will be a match for. If a volunteer is available to work at various times and locations, we recommend you leave this information blank. This ensures the volunteer is included in searches for the maximum number of jobs.

Edit Volunteer Availability

On the Availability tab, you can maintain the times and dates a volunteer is available to work for your organization. Use this for volunteers who serve your organization on a recurring basis. You can enter start and end dates and times, along with the days of the week the volunteer is normally available to work. To enter volunteer availability, click **Add** or **Edit** under **Availability**.

Note: If a volunteer is generally available to work at any time, we recommend you do not include availability information. This ensures the volunteer is included in searches for the maximum number of jobs. Additionally, if you enter multiple start and end dates that overlap, for example 1/1/2015 to 6/1/2015 and 3/10/2015 to 4/1/2015, the performance of the volunteer assignment process could be affected.

Edit Location Availability

A volunteer may be available to work in some of your organization's locations, but not in others. You use the Availability tab on the Volunteer tab to edit location availability for the volunteer. You can set up volunteer locations on the Code Tables page in *Administration*.

To enter locations where a volunteer can work, click **Add** or **Edit** under **Location**.

Note: If a volunteer is available to work at all locations, we recommend you leave this information blank. This ensures the volunteer is included in searches for all locations.

Edit Additional Availability Information

Many volunteers in your database are available on a regular basis. If there is an exception, you can record that specific instance the volunteer is *not* available without changing the volunteer's overall schedule. To enter specific dates when a volunteer cannot work, click **Edit** under **Additional information**.

Timesheets Tab

The Timesheets tab contains a list of timesheets for the selected volunteer. Timesheets contain information about the dates and times the volunteer completed assigned jobs. You can add, edit, or delete timesheets from this tab.

You can enter multiple timesheets in a batch. For more information about creating a timesheet batch, see the *Batch Guide*.

Add Timesheets

On the Timesheets tab on the Volunteer tab, you can record the amount of time the volunteer works for a specific job or job occurrence. You can use this information to manage the total number of hours a specific

volunteer works for your organization, and at what jobs. To add a timesheet for a volunteer, click **Add**. You can select the job occurrence and enter the dates and hours worked.

Edit Timesheets

If a volunteer worked two more hours than he was scheduled to work, you can update his timesheet to reflect the additional hours. On the Timesheets tab on the Volunteer tab of a constituent record, select a timesheet and click **Edit**. You can edit the job occurrence, as well as the dates and hours worked.

Awards Tab

You can add awards for your volunteers, such as a service award when a volunteer spends more than 100 hours with your organization. The Awards tab displays all the awards the volunteer has earned. Award types are set up in a configuration task. For more information, see [Volunteer Awards on page 4](#).

Add Awards

On the Awards tab, you can tack awards or special recognition a volunteer has earned. To add an award to a volunteer, click **Add**. You select the award type and can enter the date it was awarded.

Note: Award types are set up in a configuration task. For more information, see [Volunteer Awards on page 4](#).

Edit Awards

On the Awards tab, you can tack awards or special recognition a volunteer has earned. To edit an award you have given to a volunteer, select it and click **Edit**. You can edit the award type and can enter the date it was awarded.

Note: Award types are set up in a configuration task. For more information, see [Volunteer Awards on page 4](#).

Delete Awards

If you assign an award to a volunteer by mistake, you can delete it. On the Awards tab, select the award and click **Delete**.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Screenings and Expirations Page

On the Screenings and Expirations page, you can manage individual steps and overall screening plans for all available screenings in progress. To access this page, from *Volunteers*, click **Screenings and Expirations**.



Screenings in Progress Tab

The Screenings in Progress tab contains information about all screening plans currently in progress. The Screenings in Progress tab displays information for all volunteers undergoing a screening plan. As the screenings in progress list grows over time, it may be difficult to find a particular screening plan. You can filter by plan, step, or when each step is due.



Mark Screening Plan Steps Complete

After a volunteer successfully completes a step of the screening plan process, you can indicate the completion on the volunteer's screening plan. To access the screening plan, you can use the volunteer page or the Screenings in Progress tab on the Screenings and Expirations page.

You can mark a screening plan step complete directly on the Screenings in Progress tab on the Screenings and Expirations page. To do so, select the step and click **Mark complete**. Or, from the General tab of a volunteer record, select the volunteer type and click the screening plan name. Then, on the Screening Plan tab, select the step and click **Mark complete**. After you mark a step complete, you enter the date it was completed.

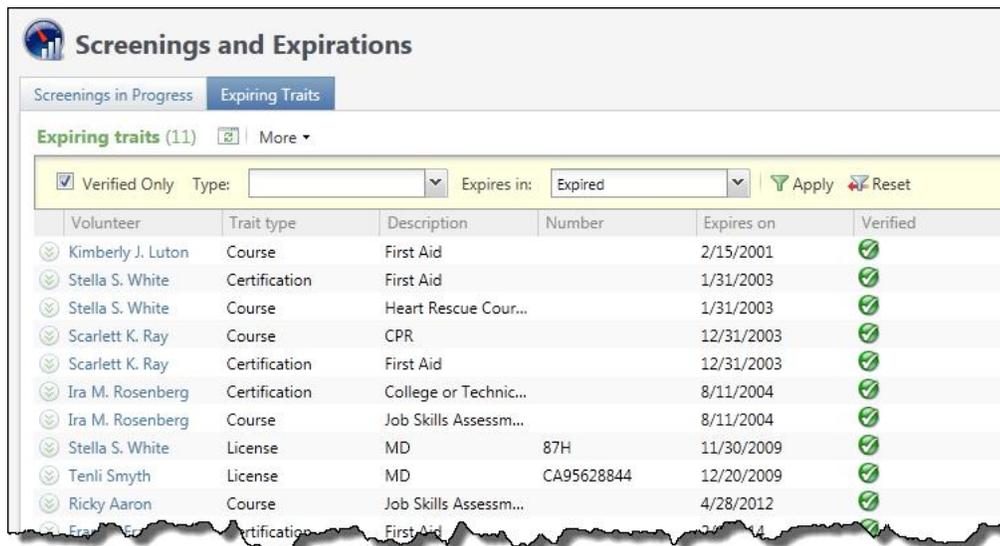
Mark Screening Plan Steps Failed

If a volunteer does not complete a required certification, you can mark that step of the screening plan as failed. To access the screening plan, you can use the volunteer page or the Screenings in Progress tab on the Screenings and Expirations page.

You can mark a screening plan step as failed on the Screenings in Progress tab on the Screenings and Expirations page. To do so, select the step and click **Mark failed**. Or, from the General tab of a volunteer record, select the volunteer type and click the screening plan name. Then, on the Screening Plan tab, select the step and click **Mark failed**. After you mark a step as failed, you enter a comment about what happened.

Expiring Traits Tab

The Expiring Traits tab on the Screenings and Expirations page displays information for all volunteers with expired traits. From this tab, you can go to a volunteer record to view more information or you can edit the trait directly to change the expiration date.



Volunteer	Trait type	Description	Number	Expires on	Verified
Kimberly J. Luton	Course	First Aid		2/15/2001	✓
Stella S. White	Certification	First Aid		1/31/2003	✓
Stella S. White	Course	Heart Rescue Cour...		1/31/2003	✓
Scarlett K. Ray	Course	CPR		12/31/2003	✓
Scarlett K. Ray	Certification	First Aid		12/31/2003	✓
Ira M. Rosenberg	Certification	College or Technic...		8/11/2004	✓
Ira M. Rosenberg	Course	Job Skills Assessm...		8/11/2004	✓
Stella S. White	License	MD	87H	11/30/2009	✓
Tenli Smyth	License	MD	CA95628844	12/20/2009	✓
Ricky Aaron	Course	Job Skills Assessm...		4/28/2012	✓
Era...	Certification	First Aid		...	✓

Screening Plan Page

The screening plan page for a volunteer contains a list of steps required to complete the screening plan. It also has a tab for the traits of the volunteer. A volunteer has a screening plan page for each screening plan he must complete. On this page, you can mark screening plan steps complete or failed and add, edit, or delete traits and notes.

To access the screening plan, from the volunteer's list of volunteer types, click on the screening plan name.

Add Screening Plan Steps for a Volunteer

After you create a screening plan for a specific volunteer type, you can add individual steps to that screening plan for a selected volunteer. For example, if you need additional references or require a second interview for a specific volunteer, you can add additional steps for these tasks.

To add an additional step to the screening plan of a specific volunteer, go to the General tab of the constituent volunteer and click the screening plan name for a volunteer type. On the Screening plan page, you can add additional steps for this volunteer's screening plan as needed.

Note: Steps you add to a specific volunteer's screening plan are not added to the screening plan itself and will not appear for other volunteers who have the same screening plan.

Edit Screening Plan Steps

On a volunteer's screening plan page, you can easily edit an individual screening plan step for a specific volunteer. For example, for a specific volunteer, you can change the due date for a single step.

To edit a step on the screening plan of a specific volunteer, go to the General tab of the constituent volunteer and click the screening plan name for a volunteer type. On the Screening plan page, you can edit individual steps, such as to update the status or change the due date.

Mark All Complete

If a volunteer has completed all the steps of his screening plan, and you have not yet marked them complete, you can mark all steps complete at once instead of marking them one at a time.

To mark screening plan steps complete for a volunteer, go to the General tab of the constituent volunteer and click the screening plan name for a volunteer type. On the Screening plan page, you can click **Mark all complete**.

Volunteer Schedule

The volunteer schedule is a calendar which displays all job occurrences assigned to the selected volunteer. You can view the job occurrences in a calendar view or in a list view. To access the schedule, from the constituent volunteer, click **Schedule** under **Tasks**.

Stella S. White
Volunteer Schedule: Stella S. White
 Phone: 907-757-2221 Email: stellawhite@bellnorth.com

Jump to date: 11/1/2011

November 2011

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	01	02	03

Filters: Assigned jobs, Potential job matches

Reset filters, Apply filters

To view a schedule report for the selected volunteer, click **View schedule** under **Tasks** on the explorer bar. For more information about the Volunteer Schedule Report, see Volunteer Schedule Report on page 27.

Add Jobs

A job is a task, or miscellaneous piece of work, assigned to a volunteer for your organization. When you add a new job to your database, you enter a name and description for the job. You can select a volunteer type and enter an estimated hourly value to associate with the job. From *Volunteers*, click **Add a job**.

Add a Job Screen

Screen Item	Description
Name	Enter a unique name to help identify the job.
Volunteer type	Select the type of volunteer required to perform this job. To enable any volunteer, regardless of volunteer type, to fulfill this job, leave this field blank.
Estimated value	Enter the estimated hourly value of the job, such as the hourly wage an employee would receive to perform the job. The program uses this value to calculate the estimated value of the work the volunteer fulfills, per the time sheets for the volunteer. On the volunteer record, the General tab displays an estimated value of the volunteer over the lifetime with your organization and for the current year.
Site	Select a site for which this job applies. The job will be available only to the site selected.
Description	Enter a detailed description to identify the job throughout the program.

Search for Jobs

In the **Search Criteria** frame, enter the criteria on which to base your job search. The more information you enter, the narrower your search will be. For example, if you know the job is for a specific event, you can select that event so the search includes jobs for only that event.

The screenshot shows a 'Job Search' window with the following elements:

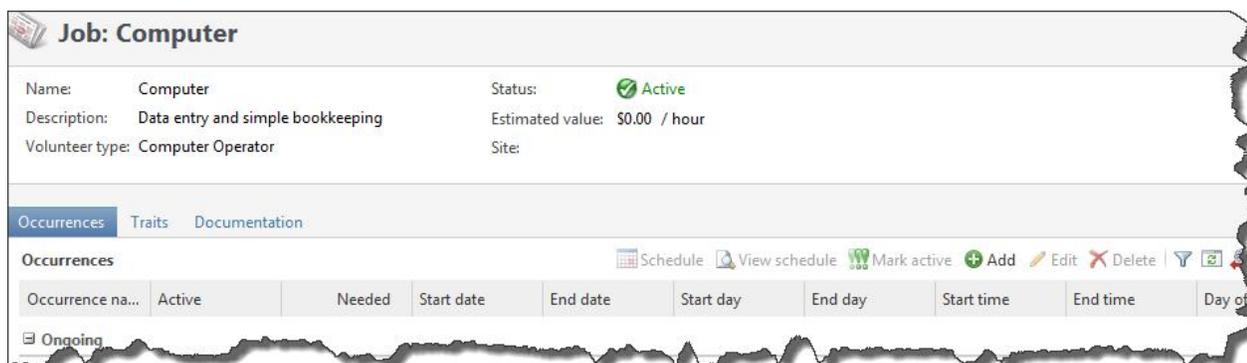
- Search Criteria:**
 - Job name: [Text Input]
 - Description: [Text Input]
 - Department: [Dropdown Menu]
 - Location: [Dropdown Menu]
 - Event: [Dropdown Menu with Search Icon]
- Buttons:** Search, Clear
- Include inactive:**
- Results:**
 - Header: Name | Description
 - Content: [Empty Table Grid]
 - Action: + Add
- Footer:** Help, Select, Cancel

To include inactive jobs in the search, mark **Include inactive**. To start the search, click **Find**. All records that satisfy your criteria appear in the search grid. Select the record you want, and click **Select**.

Job Page

The job page displays several tabs that contain information about occurrences, traits, and notes for the selected job. You can add, edit, and delete information from these tabs. The actions you can complete on the Traits tab and Documentation tab are identical to the actions on the Traits tab and Documentation tab of the volunteer page. However, when you add traits or documentation for a job, the traits and notes themselves are unique to the selected job.

For information about how to use the Traits tab, see Traits Tab on page 1.



Edit Jobs

After you add jobs, you can still edit the job's details. For example, if you need to change the job description, you can enter additional information in the **Description** field. To edit a job, from the Job page, click **Edit job** under **Tasks**.

Delete Jobs

Although you can simply mark a job inactive and save the job record for future use, you can also delete a job. When you delete a job, the program no longer recognizes that job as valid.

Warning: You cannot delete a job or job occurrence if a volunteer has been assigned to the job or when there are time sheets associated with the job.

To delete a job, from the Job page, click **Delete job** under **Tasks**.

Occurrences

The Occurrences tab contains information about the individual occurrences of a job. Job occurrences are the specific times and places a certain job needs to be completed. Some jobs may occur only one time, while others may happen regularly over an extended period of time.

Under **Occurrences**, the occurrences added for the job appear. For each occurrence, you can view information such as the number of volunteers needed for the job, the start and end times for the job, and whether the occurrence is active. To view additional information about a job occurrence, select it and click **Edit**.

You can access the job occurrence schedule to view all volunteers assigned to an occurrence. From the schedule, you can match and assign the job occurrence to volunteers. To access the schedule for a job occurrence, select the occurrence and click **Schedule**. For information about the job occurrence schedule, see Job Occurrence Schedule on page 19.

You can generate a Job Schedule report for a job occurrence. This report displays all dates and volunteers associated with an occurrence. To access the Job Schedule report for a job occurrence, select the occurrence and click **View schedule**. For information about the Job Schedule report, see Job Occurrence Schedule Report on page 25.

Add Job Occurrences

Job occurrences refer to the exact dates volunteers are needed to complete jobs. Some jobs may occur only once, while others may happen regularly over an extended period of time.

From the Occurrences tab of a job page, you can add multiple occurrences for a job and enter details about each occurrence. You can also use occurrences to manage jobs that occur at multiple locations.

From the Job Occurrences tab of an event record, you can also add multiple job occurrences for an event and enter details about each occurrence. When you add a job occurrence from an event record, you must select the job to which the occurrence applies.

► Add a job occurrence

1. Access the job for which to add an occurrence. For information about how to open a job record, see Search for Jobs on page 15.
2. Select the Occurrences tab.
3. Under **Occurrences**, click **Add** on the action bar. The Add an occurrence screen appears. For information about the items on this screen, see Add an Occurrence Screen on page 18.

4. In the **Occurrence name** field, enter a unique name to help identify the job occurrence.
5. In the **Estimated value** field, enter the estimated hourly value of the occurrence, such as the hourly wage an employee would receive to perform the job.
6. In the **Volunteers needed** field, enter the total number of volunteers the occurrence requires.

7. In the **Comment** field, enter any additional comments about the occurrence.
8. Under **When**, select the frequency for the occurrence and enter the schedule for the occurrence.
 - For a job that occurs only once, in the **Type** field, select One time, and enter the start and end dates and times of the occurrence.
 - For a job that occurs multiple times over a set period of time, in the **Type** field, select Recurring, and enter the start and end dates and time of the occurrence. In the **Day of week** field, select how frequently the job occurs each week during the time period.
 - For a job that recurs but has no fixed start or end date, select Ongoing, and enter the start and end times of the occurrence. In the **Day of week** field, select how frequently the job occurs each week.
9. Under **Where**, select the department at your organization that requires the occurrence and the location where the occurrence takes place.
10. If the occurrence supports an event at your organization, search for and select the event to associate with the occurrence.
11. Click **Save**. You return to the Occurrences tab.

Add an Occurrence Screen

Screen Item	Description
Job	When you add or edit the job occurrence from an event record, this field appears. Search for and select the job to which the occurrence applies.
Occurrence name	Enter a name for the occurrence. Be sure to enter a unique name to distinguish this occurrence from others in your database.
Estimated value	Enter the estimated hourly value of the occurrence, such as the hourly wage an employee would receive to perform the job. By default, the estimated value entered for the job appears. The program uses this value to calculate the estimated value of the work the volunteer fulfills, per the time sheets for the volunteer. On the volunteer record, the General tab displays an estimated value of the volunteer over the lifetime with your organization and for the current year.
Volunteers needed	Enter the total number of volunteers needed to fill this occurrence of the job.
Comment	Enter any additional information about a job occurrence.
Type	Select the frequency at which the job occurs. If this job occurrence is necessary only once, select One time. If this job occurrence must be completed multiple times, select Recurring. If the job occurrence recurs but has no fixed start or end date and times, select Ongoing. When you add a job occurrence for an event, you cannot select an Ongoing frequency.
Start date and End date	For a one time or recurring occurrence, these fields appears. Enter the dates volunteers begin and complete the job. For a recurring occurrence, enter the month, day, and year.
Start time and End time	Enter the times at which volunteers begin and complete the job.
Day of week	For a recurring occurrence or an ongoing occurrence, select how frequently the job occurs each week, such as every day or weekends.
Department	Select the department at your organization that requires the occurrence. Your system administration configures the selections available in this field.
Location	Select the location where the occurrence takes place. Your system administration configures the selections available.

Screen Item	Description
Event	When you add or edit the job occurrence from a job record, this field appears and is enabled when you select a frequency type of One time or Recurring. If the occurrence supports an event at your organization, search for and select the event to which the occurrence applies. On the record of the event, the occurrence appears on the Job Occurrences tab.
Site	If your organization uses site security, to restrict the occurrence to a specific site, select the site to access the occurrence.

Edit a Job Occurrence

After you add an occurrence for a specific job, you can edit details for that job occurrence as needed, such as to change the start time. On the Occurrences tab, you can select an occurrence to edit.

Delete a Job Occurrence

On the Occurrences tab, you can select an occurrence to delete. You cannot delete a job or an occurrence that has an assigned volunteer or an associated time sheet. To retain an occurrence but prevent its future use, you can mark it as inactive. For information about how to mark an occurrence as inactive, see Mark a Job Occurrence as Inactive on page 1.

Job Openings Page

The Job Openings page contains a list of all current jobs which still need volunteers. The Job Openings page contains the names of jobs and occurrences, the first date a volunteer is needed for each occurrence, start and end times for the occurrences, and the number of openings. From this page, you can view specific jobs, or view a calendar on which to assign volunteers to the open jobs.

To open the job occurrence schedule, select a job and click **Schedule**. On the Schedule page, you can view current volunteer assignments. You can assign the job occurrence to volunteers with the necessary traits, skills, or qualifications.

Job Occurrence Schedule

The job occurrence schedule is a calendar which displays all volunteers assigned to a selected job occurrence. You can view the calendar by day, week, or month. You can use the **Assign volunteers** task to view all volunteers qualified to work the selected job occurrence. You can use the **Assign** task to assign the job occurrence to a volunteer.

To go to the Job Openings page and view all available job occurrences, from *Volunteers*, click **Job openings**. To access the job occurrence calendar view, select a job with openings and click **Schedule**.

Computer
Schedule: Computer

Computer 9:00 AM - 5:00 PM

Calendar List Assign volunteers View schedule

Jump to date: 3/27/2014

Legend Customize style

Open

Booked

March 2014							Day	Week	Month
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday			
23 9:00 AM Com	24 9:00 AM Com	25 9:00 AM Com	26 9:00 AM Com	27 9:00 AM Com	28 9:00 AM Com	01 9:00 AM Com			
02 9:00 AM Com	03 9:00 AM Com	04 9:00 AM Com	05 9:00 AM Com	06 9:00 AM Com	07 9:00 AM Com	08 9:00 AM Com			
09 9:00 AM Com	10 9:00 AM Com	11 9:00 AM Com	12 9:00 AM Com	13 9:00 AM Com	14 9:00 AM Com	15 9:00 AM Com			

On the job occurrence schedule page, click **Assign volunteers** to view a list of all volunteers eligible to complete the selected job occurrence for the selected day or days. For more information about the match process, see Match Process on page 20.

Match Process

When you click **Assign volunteers** on the volunteer schedule or job schedule, the program compares the traits of a volunteer with the traits a job requires. The program also checks volunteer availability, including location availability.

The program uses several guidelines to match volunteers and jobs.

- **Volunteer type** - If a volunteer type is assigned to the job, the volunteer must have the same volunteer type, and it must be active. If there is no volunteer type assigned to the job, all volunteers meet the volunteer type requirement to match.
- **Availability** - To match, a volunteer must be available on the date and time of the job occurrence. All availability on the volunteer's record is checked. If no availability is defined for the volunteer, the program assumes the volunteer is always available. If the volunteer is already scheduled to work during the selected time, he or she will not display as a match for the selected job.
- **Location** - The volunteer must be available at the location assigned to the job. If no location is assigned to a job, the program assumes any volunteer can complete the job. If no location is assigned to a volunteer, the program assumes the volunteer is available to work at any location.
- **Special needs traits** - If one of the volunteer's traits is a special need, that volunteer is matched only with jobs that accommodate that special need. If no special needs traits are defined for a job, the program assumes that job cannot accommodate volunteers with special needs.
- **Traits** - After volunteers are matched with jobs according to volunteer type, availability, location, and special needs traits, the remaining traits are used to create a percentage match. For traits to be considered in the matching process, they must be verified on the volunteer's record. If a trait is expired on the volunteer's record, the volunteer is excluded during the match process. If a trait is required for the job, only volunteers with the trait are matched.

When the match process is complete, a list of all eligible volunteers or jobs appears. Match results are based on a percentage. The match percentage is the number of matched traits divided by the number of traits on the job, rounded up to the nearest whole number.

Match and Assign Job Occurrences to Volunteers

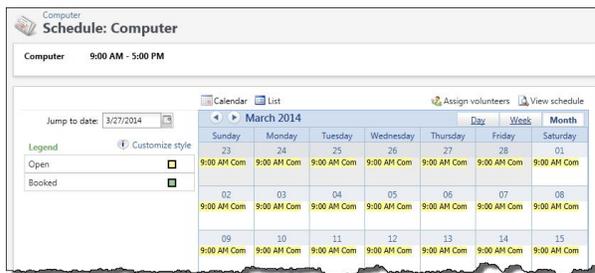
You can use volunteer types and traits to assign skilled volunteers to available job occurrences. You can access a schedule on which to assign volunteers from a volunteer page, a job page, or the Job Openings page.

► Match and assign a job occurrence to a volunteer

1. Access the job for which to assign a volunteer.

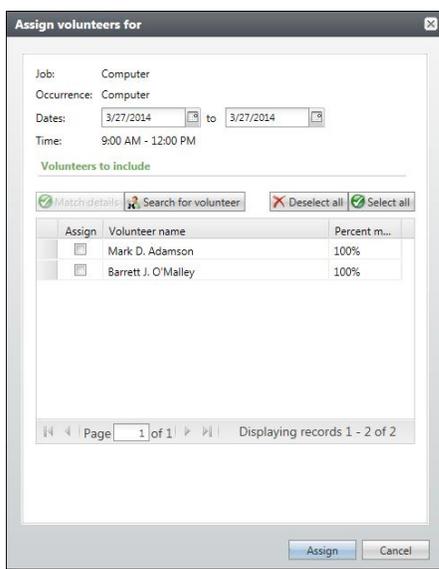
Note: You can also access a schedule from a volunteer page or from the Job Openings page.

2. Select the Occurrences tab.
3. Select a job occurrence and click **Schedule**. The job schedule screen appears.



Note: To view the names of volunteers already assigned to a specific job, hover over a calendar day.

4. On the calendar, select the day or days of the occurrences to which to assign volunteers.
5. To locate eligible volunteers, click **Assign volunteers**.



6. The names of all eligible volunteers for the selected day or days appear in a grid. The grid also displays the percentage at which each volunteer matches the job.

- To view job and volunteer details to verify they are a correct match, select a volunteer in the grid and click **Match Details**. The Match details screen appears.

Match Details

Volunteer type: Computer Operator
 Availability: 03-27-2014 All day
 Location: N/A

100% Trait Match (1 of 1)

Computer

Trait type	Description	Match	Verifi...	Required
Skill	Typing/Word Processing	True		False

All volunteer traits for Mark D. Adamson

Trait type	Description	Number/Certif...	Skill level	Expires.	Verifi...
Skill	Typing/Word Processing		Professional		
Medical	Tetanus shot				✓
Medical	TB Test				✓
Course	Health and Sanitation				✓

OK Cancel

- When you finish viewing match details, click **OK**. You return to the job schedule.
- To assign a volunteer, select the volunteer in the grid and click **Assign**. The program assigns the volunteer to the job and the number of openings for that job is updated.

Edit Volunteer Job Assignments

After volunteers are assigned to job occurrences, you can edit those assignments if needed. You can edit the assignments from the Job schedule screen, which you access from a volunteer page, a job page, or the Job Openings page.

If you select a job from the Job schedule screen, you can click **Edit assignments**. The options and fields when you edit volunteer assignments are the same as when you first assign volunteers. For more information, see Match and assign a job occurrence to a volunteer on page 21.

Remove Job Assignments from Volunteers

If there is an error in data entry or the volunteer cannot complete the job after it is assigned, you can easily remove the job assignment from the volunteer.

► Remove a job assignment from a volunteer

- Access the job for which to delete an assignment.
- From the job, click **Schedule**. The job schedule screen appears.
- On the calendar day, select the job occurrence and click **Edit assignments**. The Edit volunteer assignments screen appears. The options and fields when you edit volunteer assignments are the same as when you first assign volunteers. For more information, see Match and assign a job occurrence to a volunteer on page 21.

4. You can select the volunteer assigned to the occurrence and deselect the **Assign** checkbox. You can also click **Deselect all** if you want to remove the assignment from all assigned volunteers.
5. Click **Assign**. You return to the job schedule screen and only volunteers marked as assigned are still assigned to the job occurrence.

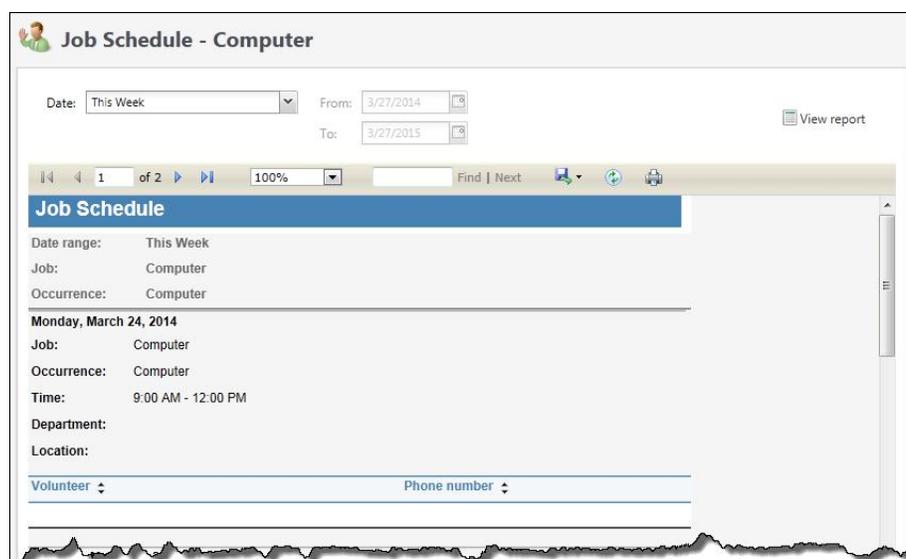
Volunteer Reports

Job Occurrence Schedule Report	25
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Volunteer Daily Schedule Report	26
Volunteer Performance Summary Report	27
Volunteer Schedule Report	27

With volunteer reports, you can track information for a specific volunteer or job. These reports help you maximize the efficiency of your volunteer program by matching assignment needs with volunteers who have the right skills, availability, and experience. With volunteer reports, you can generate and print schedules for all jobs, a specific job, or a specific volunteer. You can generate and print daily schedules and export to a variety of file types. With volunteer reports and schedules, you can maintain a well-organized volunteer program.

Job Occurrence Schedule Report

The Job occurrence schedule report displays all dates and assigned volunteers for a selected job. You can indicate a specific date range, such "This week," for a report.

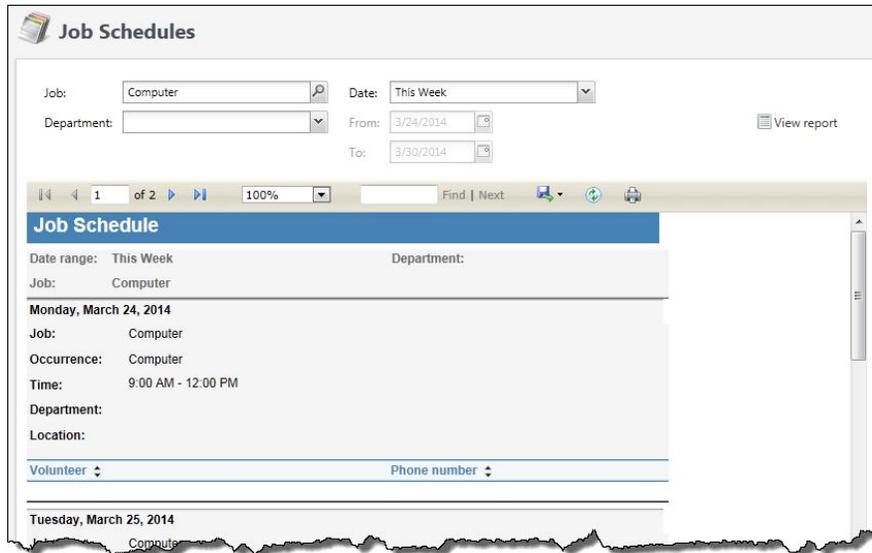


To run this report, from *Volunteers*, click **Job occurrence** under **Reports**. You can view the report from the job record or from the Job schedule page. If you access the report from Volunteers, you are prompted to select the

job to use. On the report, you can select a date range to filter the results. Click **View report** to generate the report.

Job Schedules Report

The Job schedules report displays all occurrences of all jobs in the date range and department you select. You can also select a specific job for the report. The report includes the name, date, and time of the job. It also includes the job occurrence, department, and location.

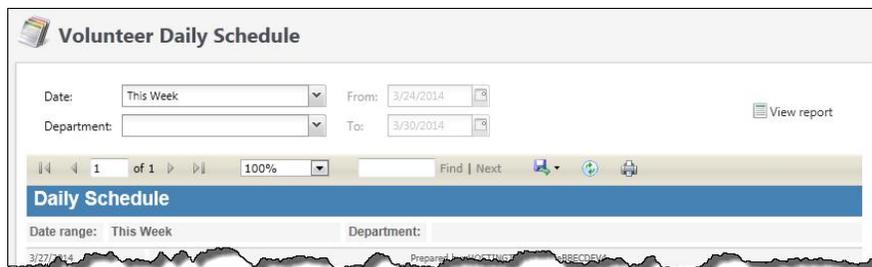


To run this report, from *Volunteers*, click **Job schedules** under **Reports**. You can select the job to view, as well as a date range to filter the results. If you do not select a specific job, the report includes all jobs for the date range and department specified.

Volunteer Daily Schedule Report

The Volunteer Daily Schedule report displays all assignments for the selected day or date range. It includes the name of each volunteer and the job assigned to each volunteer. It also includes the start time, end time, and department for the assignment.

Note: If a job is scheduled for the selected day, but no volunteer is assigned to the job, the report will not generate. The Daily Schedule Report displays assignments only.



To run this report, from *Volunteers*, click **Volunteer daily schedule** under **Reports**. You can select the date or date range to filter the results. You can also select a department to filter the results.

Volunteer Performance Summary Report

The Volunteer Performance Summary report displays information about a volunteer's activity with your organization for a selected time period and over the volunteer's lifetime with your organization. To access this report from *Volunteers*, click **Volunteer performance summary** under **Reports**.

Volunteer Performance Summary

Include... All volunteers

Date: This year From: 1/1/2014 To: 12/31/2014 View report

Site:

1 of 1 100% Find | Next

Volunteer Performance Summary

Filter selection: All volunteers

Date range: This year

Site:

Volunteer	This year		Lifetime	
	Hours	Estimated value	Hours	Estimated value
Total		0		0

Page 1 of 1

To run the report, select the volunteers and date range to include in the report and click **View report**. You can include all volunteers, a volunteer selection created in *Query*, or a specific volunteer.

The report displays the hours worked by each volunteer for the selected date range and over the lifetime with your organization. For each time period, you can also view the estimated value of the volunteer, based on the jobs the volunteer performed and the hours worked. The program automatically calculates these values based on the timesheets entered for the volunteer and the estimated values of the jobs.

Volunteer Schedule Report

The Volunteer Schedule report displays a schedule for a specific volunteer. You select the date range for which to generate a schedule. The schedule includes the date and time of each volunteer assignment and includes the occurrence and location for each job.

Volunteer Schedule

Date: This Week From: 3/24/2014 To: 3/30/2014 View report

1 of 1 100% Find | Next

Volunteer Schedule

Date range: This Week Volunteer: Mark D. Adamson

Page 1 of 1

To run this report, from *Volunteers*, click **Volunteer schedule** under **Reports**. You can select a date range to filter the results. You can also access the report from volunteer when you click **View schedule**.