Upgrading from VolunteerWorks to Volgistics

Step-by-step instructions for organizations that use VolunteerWorks.

Learn how to open a free trial account at Volgistics, convert your volunteer data from VolunteerWorks, and try Volgistics without any cost or obligation.

Step 1: Get a free trial account

Sign up for a free Volgistics trial account. You can convert data from VolunteerWorks into your trial account without any cost or obligation. Then if you decide you want to switch to Volgistics, you simply upgrade your trial account to a paid account, keeping the same account number. To get a free trial account:

1. Visit http://www.volgistics.com/free-trial.htm.

2. Complete and submit the free trial account sign-up form.

3. Once you sign-up, you'll receive your Volgistics account number by email. Record it here for future reference.

   My Volgistics account number: ☐☐☐ - ☐☐☐ - ☐☐☐

4. Visit https://www.volgistics.com and then click **Login**.

5. On the Login page, enter your Volgistics account number, the email address and password you entered when you signed-up for your trial account, and then click the Login button.

6. The very first time you log in you'll be asked to complete a *Getting Started Interview*. This Interview gives you a head start customizing Volgistics. If you're not sure about any of the Getting Started questions just choose the default answers - you can easily make changes to the way Volgistics is set up later.

Step 2: Copy Your Data From VolunteerWorks

Once you have a Volgistics account, you can copy your volunteer records from VolunteerWorks into Volgistics. Copying your volunteer data into Volgistics will not change the information in your VolunteerWorks database. If you're just testing to see how your data will appear in Volgistics, you can continue using VolunteerWorks as usual and then convert your data from VolunteerWorks to Volgistics again later when you're ready to switch.

If you have VolunteerWorks version 3, you can either use VolunteerWorks to copy your data to Volgistics yourself whenever you choose, or if you'd prefer, the Volgistics team can copy it into your account for you at no cost.

Whichever way you choose to copy your VolunteerWorks data into Volgistics, you should review *The Guide for Converting from VolunteerWorks to Volgistics*. It explains how your data is converted and answers many questions organizations have about the conversion process. The *Guide* is available as a PDF download at https://www.volgistics.com/assets/GuideToConverting.pdf

Copy It Yourself

1. Start VolunteerWorks.
2. Make an online backup:
   A. Open the **File** menu and then choose **Backup**.
   B. Check **online backup only**.
   C. Click **Start**.
3. Run VolunteerWorks System Maintenance:
   A. Open the **File** menu and choose **System Maintenance**.
   B. Check **Include archives**.
   C. Click **Start**.
4. When System Maintenance is finished, open the **Internet** menu and then choose **Volgistics Conversion Utility**.
5. Follow the instructions on the screen

Need an update?
If you don't see an option for the **Volgistics Conversion Utility** on the **Internet** menu in VolunteerWorks, or if you receive a message telling you that a VolunteerWorks update is required, download the free VolunteerWorks update like this:

1. Start VolunteerWorks.
2. Open the **Internet** menu and then choose **Update VolunteerWorks**.
3. Follow the instructions on the screen to get the latest VolunteerWorks update for free.

Need help?
If you experience any difficulty copying your data to Volgistics, you can always ask Volgistics to copy it for you. There's no cost—just follow the instructions on the right side of this page.

Ask Volgistics to Copy It For You

Enter this web address in your browser and then follow the instructions on the screen:

https://www.volgistics.com/VolunteerWorks-request.htm

You'll get instructions on how to upload your current VolunteerWorks data files to Volgistics.

You'll need your Volgistics account number and your Volgistics login name and password to request this service.

The Volgistics team can usually copy your VolunteerWorks data into your Volgistics account by the end of the next business day, however additional time may be required to complete your request in some circumstances.

There's no cost for this conversion service for VolunteerWorks users.

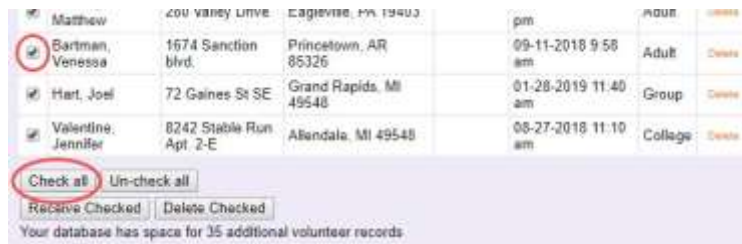# Step 3: Receive Your VolunteerWorks Data in Volgistics

The data you copy from VolunteerWorks goes into your Volgistics Mailbox. Complete this step to *receive* it into your Volgistics database. You must complete this step before you can begin using your VolunteerWorks data in Volgistics.

1. Login to your Volgistics account.

2. Choose **Mailbox** from the Volgistics menu.

3. Select the **Applications** tab.

4. The **Applications** tab is where newly imported volunteer records or new applications you receive from your online volunteer application forms are held until you receive them into your database. You'll see a list of all of the volunteer records you copied from VolunteerWorks here.

5. If you're using a free trial account at this point, you'll only be able to receive up to 50 of your existing volunteer records. If you've activated your Volgistics account, you'll be able to receive all of your existing records (as long as you selected a service level that provides space for all of your records).

   Place a checkmark next to the records you want to move into your Volgistics account. If you're using a trial account, you may check up to 50 volunteer records. If you have a paid account, you can click the **Check all** button at the bottom of the list to select all of your records.
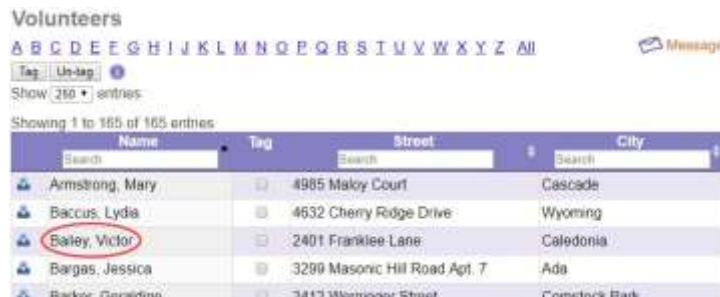

6. Click the **Receive Checked** button.
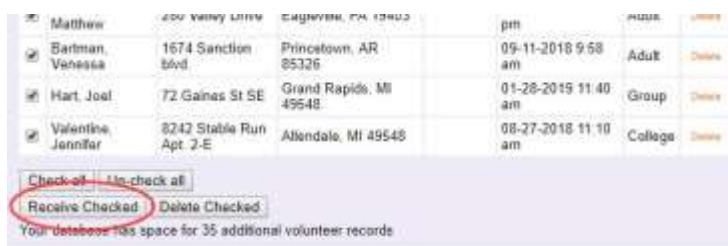
   The records you checked are now in your Volgistics database. Continue to Step 4 for a quick tour of basic Volgistics navigation and a look at the volunteer data you copied from VolunteerWorks.

Step 4: Check It Out!

Once you've converted some or all of your volunteer records into Volgistics, you're ready to go. From here, you can start using Volgistics, or just log in to see what your data looks like. This step shows how to view volunteer records and print a volunteer list report.

View Volunteer Records

1. If you're not already there, login to your Volgistics account.

2. Choose **Volunteers** from the menu.

3. Click the **All** link near the top of the page. All of your volunteer records are listed alphabetically.

4. Click on any volunteer's name to see their record.

5. Click on any tab to access the selected volunteer's information.

Print a volunteer list

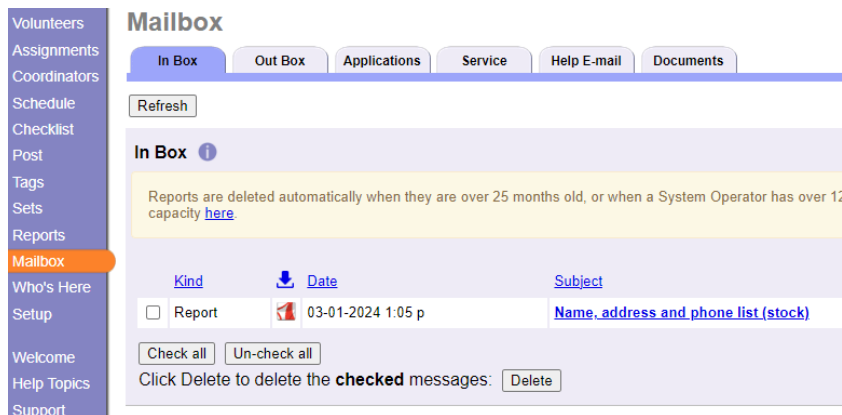1. Select **Reports** from the Volgistics menu.

2. Expand **Volunteer List**, then click **Name, address and phone list (stock)**.
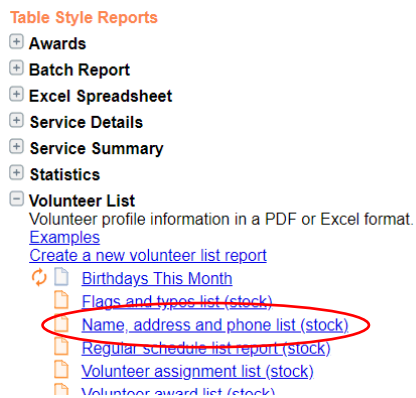
3. Click the **Run It** button, and then click **Run Now**.

4. Your report will be delivered to your Volgistics **Mailbox** in a few moments as a PDF file. Simply click the link in your Mailbox to open or save the report.

See VicTouch in action

VicTouch is the optional module you can use to provide on-site touch screen stations for volunteer interaction and time-clock functions. If you would like to see how the optional VicTouch module will look with your volunteer data just follow these steps:

1. Make a note of an active volunteer's Number (Choose **Volunteers** from the menu, click the **All** link to see the list of all volunteers, and then click on the name of an active volunteer. The volunteer's Number appears to the right of the Last Name field.).

2. Choose **Setup** from the menu.

3. Select **VicTouch**.

4. Click **Launch at This Computer**. This opens the VicTouch module at your own computer.

5. Enter the volunteer Number you noted in Step 1, and then follow the instructions on the screen.

You can learn more about setting-up and using VicTouch in the Options to Launch VicTouch help topic.

See VicNet in action

VicNet is the optional module you can use to provide tools for online volunteer interaction. If you would like to see how the optional VicNet module will look with your volunteer data just follow these steps:

1. Choose **Volunteers** from the menu.

2. Click the **All** link to see the list of all volunteers.

3. Locate and click the name of an active volunteer who has an email address in the **Email** field on their Core tab.

4. Go to the **Vic** tab in this volunteer's record.

5. Click the **Log in as Volunteer** button. This opens a new browser window with the VicNet module displayed for the selected volunteer (this is what this volunteer would see at VicNet).

You can learn more in the Getting Started with VicNet help topic.

Step 5: Learning Volgistics

If you're familiar with VolunteerWorks then you'll already know the basic concepts of Volgistics. However, Volgistics does look and work differently than VolunteerWorks, so there's a bit of learning that you and your staff may need to do as you get started. Fortunately, Volgistics makes common volunteer tracking tasks easy, so it shouldn't take you long to get up to speed.

The Volgistics Help page includes tools that will help you learn how the s=ystem works.

1. If you're not already there, login to your Volgistics account.

2. Choose **Help Topics** from the menu.

Enter keywords about what you need here to search the help system for answers or information.
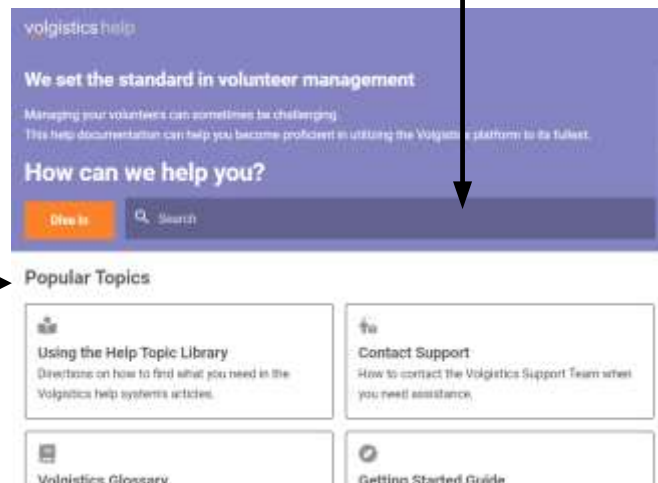
Use the links here to see answers to read popular help topics.

The **Getting Started Guide** includes a series of help topics for people new to Volgistics.

Step 6: Make the switch

Some organizations activate their Volgistics account and start using Volgistics as soon as they copy their VolunteerWorks data. Others continue to use VolunteerWorks while they explore Volgistics, and then copy their VolunteerWorks data into Volgistics again when they're ready to make the switch. Either approach will work, and you should choose the path which best suits your needs.

Activate your Volgistics account

When you're ready to make the switch, you'll need to activate your Volgistics account and set your initial service level. You do this at the secure Volgistics Store.

1. Visit www.volgistics.com, hover over **Try or Buy** and click **Store**.

2. Enter your Volgistics account number, login name, and password.

3. Follow the steps on the page to set your service level and payment options.

Re-copy your VolunteerWorks data

If you'd like, you can clear the data you previously imported into Volgistics and run the conversion from VolunteerWorks again. This is a good idea if you want to continue using VolunteerWorks until your conversion date, but experiment with your data in Volgistics until then. **Important:** Do not clear your account if you have already started using Volgistics.

To clear your account so you can re-run your VolunteerWorks conversion:

1. Login to your Volgistics account.

2. From the Volgistics menu, select **Setup**.

3. Expand **Account Management**.

4. Click the **Clear Account** link, and then follow the instructions for clearing your account.

    You can optionally keep your current account setup and reports when you clear your account.

    ☑ Keep account setup
    ☑ Keep reports
    ☑ Download all VicDoc Documents

    Check **Keep account setup** only if you've made some Volgistics customizations (such as setting up system operators) that you want to preserve. If you un-check **Keep account setup**, any customizations you've made will be reset: your setup options will all be refreshed to the way they were when you first created your account.

    Check **Keep reports** only if you've created custom reports that you want to preserve. If you uncheck **Keep reports**, you'll just have the stock reports that come with all new accounts.

5. Repeat **Step 2 Copy your data from VolunteerWorks** on page 2.

If you use the VolunteerWorks Volunteer Information Center

If you use the VolunteerWorks "Vic" (Volunteer Information Center) module at a touch screen computer, you'll need to load the VicTouch module at that computer as part of your transition to Volgistics. Instructions on how to load the VicTouch module are available at:
https://www.volgistics.com/help/victouch-time-clock/options-to-launch-victouch/