

volgistics™

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 www.volgistics.com and then click **Free Trial**.



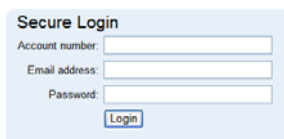
2. Complete and submit the free trial account sign-up form.
3. Once you sign-up, you'll receive your Volgistics account number. Record your Volgistics account number here for future reference:

My Volgistics account number: - -

4. Visit www.volgistics.com and then click the **Login** tab.



5. On the Secure 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.



Secure Login

Account number:

Email address:

Password:

6. The very first time you login 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 setup later.

Step 2

Copy your data from VolunteerWorks

Once you have a Volgistics account (see **Step 1**) 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 copy 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, Volgistics can copy it into your Volgistics 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 file at <http://www.redridge.com/downloads/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 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:

<http://www.volgistics.com/VolunteerWorks.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.

Volgistics 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 service to Red Ridge customers.

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.

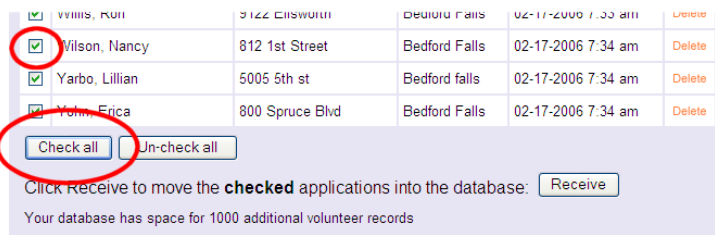
1. Login to your Volgistics account.
2. Choose 'Mailbox' from the Volgistics menu.
3. In your Volgistics mailbox, select the 'Applications' tab.



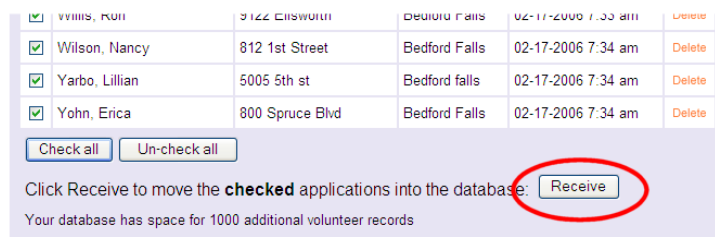
4. The Applications tab is where newly imported volunteer records or new applications you receive from your online volunteer application forms are held until you 'receive' them into your database. You'll see a list of all of the volunteer records you copied from VolunteerWorks here.

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.



5. Click the **Receive** button.



The records you checked are now in your Volgistics database. Continue to Step 4 for a quick tour of basic Volgistics navigation and at 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 login 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 Volunteers page. All of your volunteer records are listed alphabetically.

Volunteers

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

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

Volunteers

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

Name	Tag	Street	City	State
Applebe, Tom	<input type="checkbox"/>	6876 Howard Avenue	Bedford Falls	IN
Bailey, Henry	<input type="checkbox"/>	2454 Elm Street	Bedford Falls	IN
Bailey, Mary	<input type="checkbox"/>	320 Sycamore	Bedford Falls	IN
Ballard, Elizabeth	<input type="checkbox"/>	819 Elm Street	Pottersville	IN
Bannan, Koshia	<input type="checkbox"/>	812 1st Avenue	Bedford Falls	IN

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

Bailey, Mary

Core **Profile** **Service** **Schedule** **History** **Contacts** **Notes** **Vic**

Tagged

Name

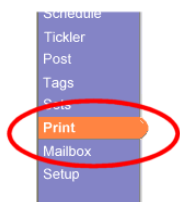
Last name: Number:
First name: Status:
Middle name: Title: Type:
Nickname:

Address

Street 1: Home: Ok to call
Street 2: Work: Ok to call

Print a volunteer list

1. Select 'Print' from the Volgistics menu.



2. On the Print page click “Volunteer list,” then click “Name address and phone list (stock).”

Print

Choose the kind of report you want to print:

- Address labels
- Batch report
- Excel spread sheet
- Labels
- Name tags
- Service details
- Service summary
- Volunteer list
 - [Examples](#)
 - [Create a new volunteer list report](#)
 - [Flags and types list \(stock\)](#)
 - [Name, address and phone list \(stock\)](#)
 - [Regular schedule report \(stock\)](#)
 - [Volunteer assignment list \(stock\)](#)
 - [Volunteer award list \(stock\)](#)

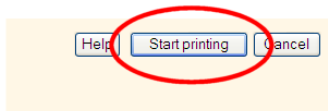
3. Click the **Print it** button, and then click **Start printing**.

Print

Name, address and phone list (stock)

What would you like to do?

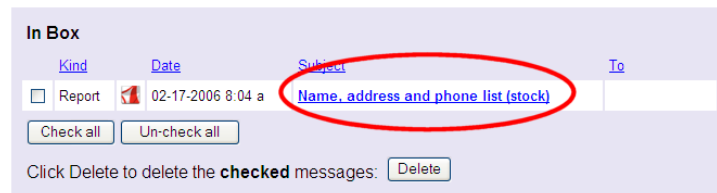
- Create this spread sheet now
- Show me an example of this report
- Make setup changes to this report



4. Your report will be delivered to your Volgistics mailbox in a few moments as a “PDF” file.

To view or print the report, select Mailbox from the menu.

From the “In Box” click the name of the report. If your report has not yet been delivered, wait a moment and then click the “Refresh” button. If you have Adobe Reader, your report will open for you to view. From Adobe Reader you can optionally print the report, or save it to your own computer.



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 Volunteer's 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. Click "VicTouch."
4. Click "Launch at this computer." This opens the VicTouch module at your own computer. While the VicTouch module is designed to be used with a touch screen monitor, you can preview VicTouch with a regular monitor: use your mouse to click the buttons rather than touching them.
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 Volgistics help topic 1184 (visit www.volgistics.com; click Help; search for "1184")

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 Volunteer's from the menu.
2. Click the "All" link to see the list of all volunteers.
3. Locate the record for an active volunteer who has an email address in the Email field on their Core tab.
4. Click the "Vic" tab in this volunteer's record.
5. Click the Preview 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 about setting-up and using VicNet in Volgistics help topic 1175 (visit www.volgistics.com; click Help; search for "1175")

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 system works.

1. If you're not already there, login to your Volgistics account.
2. Choose Help from the menu.

Enter a subject or question here and click Go to search the help system for answers or information.

The screenshot shows the Volgistics Help page. At the top, there is a search bar with the text "Search:" and a "Go" button. Below the search bar is an orange bar with the text "Close this window". The page is divided into several sections: "Documentation" with links for "Getting Started", "Table of Contents", "Sample Reports", and "Index"; "Lessons" with links for "Basics (10:25)" and "Tracking volunteers (7:28)"; "Ask a question" with a form for "Subject:" and "Question:"; and "Popular questions & answers" with links for "What should I do if my mailing labels do not align properly?", "How do I setup a VicTouch computer?", and "Why don't the 'Check your records' and the 'Volunteer opportunities' buttons work in VicTouch?".

volgistics™ Help Search: Go

Close this window

Documentation

- Getting Started
- Table of Contents
- Sample Reports
- Index

Lessons

Flash audio-video presentations that teach you how to use Volgistics

- Basics (10:25)
- Tracking volunteers (7:28)

You'll need Macromedia Flash Player to view these. If you don't already have it installed, you can click [here](#) to download it.

Get macromedia FLASH PLAYER

Ask a question

Can't find the answer to a customer service or technical support question? You can post an inquiry for the Volgistics Team here. Complete all three fields and then click the **Send** button to post your question.

Subject:

Enter a subject (up to 60 characters)

Question:

Enter your question

This is about:

Select an option

[Help](#)

Popular questions & answers

- [What should I do if my mailing labels do not align properly?](#)
- [How do I setup a VicTouch computer?](#)
- [Why don't the 'Check your records' and the 'Volunteer opportunities' buttons work in VicTouch?](#)

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.

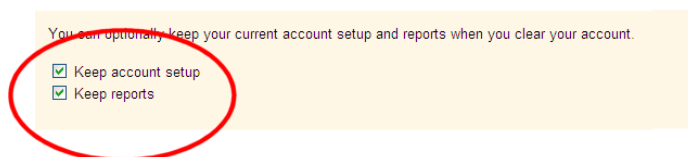
1. Visit www.volgistics.com and click the 'Store' tab.
2. Enter your Volgistics account number, login name, and password.
3. Choose the 'Activate account' option.

Re-copy your VolunteerWorks data

If you'd like to, 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. From the Setup page, select 'Account Management.'
4. Click the 'Clear account' link, and then follow the instructions for clearing your account.



Check "Keep 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 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 a large number of custom reports that you want to preserve. If you uncheck "Keep reports," you'll just have the stock reports that come with all new systems.

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 Volgistics “VicTouch” module at that computer as part of your transition to Volgistics.

Instructions on how to load the VicTouch module are available at:

<http://www.volgistics.com/ex/help.dll?ACT=21&TOPIC=8271>

(or visit www.volgistics.com; click Help; search for “8271”)