volgistics
Guide to Converting from VolunteerWorks

Volgistics is the new service that offers people who lead volunteer programs wonderful new capabilities: access to their volunteer information from any internet connected computer, freedom from software, and the ability to recruit and coordinate volunteers using the power of the Internet.

This *Guide* explains how organizations that currently use the VolunteerWorks program can copy their existing volunteer database from VolunteerWorks into Volgistics. Organizations can copy their volunteer database from VolunteerWorks to Volgistics if they simply want to see how their data will work in Volgistics, or if they're ready to make the switch from VolunteerWorks to Volgistics permanently.

If you simply want to see your VolunteerWorks data in Volgistics as part of free Volgistics Trial, read the section 'Before you convert' and then follow the instructions in Part 4 How to Run the Conversion

Use the entire Guide if you want a comprehensive picture of how the conversion process works and what information can be converted.

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Part 1
An Overview of the Conversion Process

VolunteerWorks (version 3) includes a built-in tool organizations can use to automatically convert their volunteer database from VolunteerWorks to Volgistics. It is provided as part of VolunteerWorks for organizations that want to convert from VolunteerWorks to Volgistics, or that want to try Volgistics with some of their existing VolunteerWorks data.

The Volgistics service is different than VolunteerWorks in a number of ways. While Volgistics is an excellent tool for most volunteer programs, there are some database tracking capabilities that exist in VolunteerWorks but not in Volgistics, and some that exist in Volgistics but in VolunteerWorks. In addition, the Volgistics system has an interface designed for web browsers, and to make it easier to understand and get around. This means that some information is organized and displayed differently in Volgistics than in VolunteerWorks.

Consequently, not every kind of information that can exist in VolunteerWorks can be automatically converted into Volgistics. This Guide includes a detailed description of how the conversion utility works, and what kinds of data cannot be converted automatically. **You should review this Guide before using the conversion utility to learn what can and cannot be converted automatically.**

The conversion utility does not remove or change any information in VolunteerWorks. It simply copies data from VolunteerWorks to Volgistics. If you want to try Volgistics with your VolunteerWorks data, you can use the conversion utility to copy your records to Volgistics and then continue using VolunteerWorks while you try Volgistics.

There is not a conversion process for moving information from Volgistics into VolunteerWorks.

How the conversion utility works

You must have a Volgistics account to use the conversion utility. Your Volgistics account can be a free trial account, or a paid account. If you do not have a Volgistics account yet, visit www.volgistics.com and click the 'Free trial' link to sign-up for a free trial account.

The conversion utility is integrated into the VolunteerWorks program. When you start the conversion, the utility contacts the Volgistics system via the Internet, and then begins to send the data you choose to convert over the Internet into your Volgistics account. When the conversion is finished you can login to Volgistics to *receive* and start working with the converted data.

Although it is not required, it's best if you 'clear' your Volgistics account before you convert your VolunteerWorks data. Clearing your Volgistics account removes all of the volunteer and assignment information that you may have previously entered in Volgistics, and gives the conversion utility a 'clean' database to convert your VolunteerWorks data into.

If you choose not to clear your Volgistics account before converting your VolunteerWorks data - and if you've already started to customize Volgistics 'Setup' options - you can still run the conversion, however there is a chance that converted data may be placed in Volgistics fields you've already designated for other purposes.

You may run the conversion more than once. Organizations may like to run the conversion once or twice to see how the conversion works, and then again when they are ready to make the transition to Volgistics. VolunteerWorks and Volgistics *are not* intended for use together. The conversion utility is for transferring data from VolunteerWorks into Volgistics when an organization chooses to switch from VolunteerWorks to Volgistics.

The conversion utility will not create duplicate volunteer records if a volunteer record already exists in Volgistics with the same name and PIN number as in the VolunteerWorks data.

The conversion utility allows organizations that have multiple VolunteerWorks systems to consolidate their VolunteerWorks data into a single Volgistics account. Organizations can optionally use the Volgistics *site level access* features to segregate data from multiple VolunteerWorks systems in a single Volgistics account.

If the data you convert into Volgistics contains more volunteer records than you currently have room for in your Volgistics account, you will be only be able to *receive* as many records as you have space for. You can increase your account service level to make more space available, and then *receive* the remaining records, or – for trial purposes – only *receive* as many records as you have space for.

Security & Privacy

While transferring data between VolunteerWorks and Volgistics, the Volgistics Conversion Utility uses 128-bit secured-socket layer (SSL) data encryption—the same level of encryption used in online banking. With SSL, all of your information is encrypted – or scrambled – as it travels back and forth between your computer and the Volgistics data center.

Once your data reaches the Volgistics system it is protected by the same security and privacy policies that apply to all data stored in the system (visit www.volgistics.com for details).

Reports and Filters

Both VolunteerWorks and Volgistics include features for producing printed *reports*, and for extracting specific sets of volunteers based on criteria you specify (the tool used to do this in VolunteerWorks is known as a *filter*). However, the way these features work in each system is different. Volgistics has a different internal mechanism for providing reports and for extracting sets of volunteers than VolunteerWorks.

For this reason it is not possible for the conversion utility to convert *reports* or *filters* you've created in VolunteerWorks to Volgistics.

While Volgistics offers many printed report capabilities that are similar to those found in VolunteerWorks, there is not necessarily a one-to-one relationship between a particular VolunteerWorks report and a Volgistics report. Part of your organization's migration to Volgistics may therefore need to include some adjustment to new printed report formats.

System Operators

The conversion utility also does not convert *system operator* records from VolunteerWorks into Volgistics. You can establish Volgistics system operators before or after you convert your information from VolunteerWorks. The number of system operators you can create in Volgistics relates to the service level you choose for your Volgistics account.

How long will the conversion take?

How long it takes to run the conversion will depend on several factors, primarily the number of volunteer records you're converting from VolunteerWorks and the *upload* speed of your Internet connection. A large VolunteerWorks database converted over an Internet connection with a slower *upload* speed (such as dial-up and some cable modem connections) could take several hours to complete. For this reason you should start the conversion at a time when it will be convenient for you to let the process run while not using VolunteerWorks.

Part 2
Prerequisites

Before you can convert your VolunteerWorks data into Volgistics, the Volgistics Conversion Utility checks your existing data to be sure it conforms to several requirements for conversion. There are four prerequisites:

- Number of department levels are two or fewer, "model" is 1 or 2
- Number of reminder steps are 54 or fewer
- Number of award definitions are 120 or fewer
- Your Volgistics account is ready

If the Volgistics Conversion Utility finds that any of these prerequisites are not met, it alerts you as shown below. If a prerequisite is not met you must make the necessary adjustments before you can proceed with the conversion.

Number of department levels

VolunteerWorks lets you organize volunteer job records under an organizational structure that can have many different levels.

While this VolunteerWorks capability is useful to a few organizations that have more complex organizational structures, it introduces un-necessary complexity for a majority of users. While it is possible to track volunteer jobs in organizations with complex organizational structures in Volgistics, Volgistics does it in a simpler way, which is easier for everyone.

To achieve this ease of use, you may have to do some re-organizing of your VolunteerWorks *departments* before you can convert your data. The Volgistics import tool will check this for you automatically and tell you if any adjustments are required.

If the conversion utility shows you the following message it means there are currently too many department levels in your VolunteerWorks database, or you're using VolunteerWorks "model 3":

 Number of department levels: n

If your VolunteerWorks database is currently configured for "model 3," you must switch to model 1 or 2 before you can run the conversion. The VolunteerWorks documentation explains more about these different database models, and how to switch from one to another.

How to count the number of department levels in your VolunteerWorks database:

1. In VolunteerWorks, select the File menu and then choose "Volunteer Explorer." This opens the Volunteer Explorer window.

2. Volunteer Explorer has two window 'panes,' a right and a left. Right-click on the left pane, and then choose "Expand jobs" from the pop-up menu.

3. Volunteer Explorer expands the list of Departments and Jobs in your database so you can see how they are currently organized, as shown in the following illustration:

In the example illustrated above, VolunteerWorks "Departments" are the items with the 'table of organization' icon ( ), and VolunteerWorks "Jobs" are the items with the 'brief case' icon ( ). This example shows us that we have departments 'nested' three levels deep: the department "Direct Services" (level 1), has a sub-department called "Branch Offices" (level 2). "Branch Offices" in turn has two sub-departments "Northside Branch Office" and "Southside Branch Office" (level 3). In order to reduce the number of department levels in this sample we can *relocate* the "Northside Branch Office" and "Southside Branch Office" departments so they fall directly under "Direct Services," as shown on the next page.
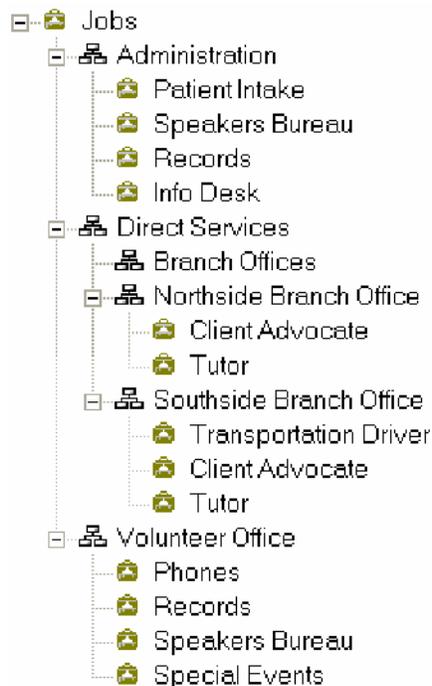
How to relocate a Department using Volunteer Explorer in VolunteerWorks:

1. Right click on the name of the department you want to relocate, and then choose "Cut" from the pop-up menu.

2. Right click on the name of the department you want to relocate the selected department to, and then choose "Paste" from the pop-up menu. If you want to relocate the selected department to the root level (that is, make it a level 1 department), right click on the top level Jobs icon at the top of the list of jobs (   ) and then choose "Paste" from the pop-up menu.

Using the VolunteerWorks Volunteer Explorer as explained above, re-organize your table of departments by relocating "nested" departments to the root level (   ), or to a 1st level department.

Number of reminders steps

While VolunteerWorks can have an unlimited number of "Reminder steps," Volgistics can track a maximum of 54 (these are called "Checklist items" in Volgistics). Why does Volgistics have this limitation but not VolunteerWorks? By setting a maximum number of checklist items Volgistics performs certain database operations – such as reporting – much faster than VolunteerWorks. In addition, having a fixed number of reminder steps makes the Volgistics database more robust. A majority of volunteer programs track fewer than 54 checklist items.

Before converting your data, the conversion utility counts any Checklist items already setup in your Volgistics account, plus the number of reminder items in your VolunteerWorks database to be sure there is enough room in Volgistics for the Reminder steps you currently have in VolunteerWorks.

If the conversion utility shows you this message it means there is not currently enough room in Volgistics for all of the Reminder steps in your VolunteerWorks database. In this case you must reduce the total number of different Reminder steps to 54 or fewer before you can proceed with the conversion.

✖ Space for reminder steps (n too many)

These are some ways you may be able to make room:

1. Check the Volgistics account you are converting your data into. If there are any Checklist items established in your Volgistics account that you don't need, delete them. To see the list of checklist items you have established in Volgistics, login to Volgistics, choose Setup from the menu, and then click on Checklist.

2. Review your list of Reminders in VolunteerWorks (click on the File menu and choose Reminder). Delete any that were entered as practice, or which you no longer use.

3. Where possible, combine Reminders steps together.

4. If you have any Reminder steps that apply only to a small number of volunteers, consider tracking these with simple date records instead of Reminder Steps.

If you must have more than 54 Reminder steps you may not be able to use Volgistics, or you may need more than one Volgistics account.

Number of award definitions

While VolunteerWorks can contain an unlimited number of award levels, Volgistics can track a maximum of 120. Why does Volgistics have this limitation but not VolunteerWorks? By setting a maximum number of award levels Volgistics performs certain database operations – such as reporting – much faster than VolunteerWorks. In addition, having a fixed number of award levels makes the Volgistics database more robust. A majority of volunteer programs track fewer than 120 award levels.

Before converting your data, the conversion utility counts any Award levels already setup in your Volgistics account, plus the number of Award levels in your VolunteerWorks database to be sure there is enough room in Volgistics for the Award levels you currently have in VolunteerWorks.

If the conversion utility shows you this message it means there is not currently enough room in Volgistics for all of the Award levels in your VolunteerWorks database. In this case you must reduce the total number of different Award levels to 120 or fewer before you can proceed with the conversion.

✖ Space for award items (n too many)

These are some ways you may be able to make room:

1. Check the Volgistics account you are converting your data into. If there are any awards established in your Volgistics account that you don't need, delete them first. To see the list of Awards you have established in Volgistics, login to Volgistics, choose Setup from the menu, and then click 'Awards.'

2.   Review your list of Awards in VolunteerWorks (click on the File menu and choose Awards). Start by deleting any you entered as practice, or which you no longer use.

3.   Where possible, combine any two or more Award levels into a single award.

4.   If you have any awards that are given infrequently – or that are not based on a service measure you track in the database – consider tracking these with simple date records on the VolunteerWorks Dates tab.

If you must have more than 120 award levels you may not be able to use Volgistics, or you may need more than one Volgistics account.

Your Volgistics account is ready

Before you can convert data from VolunteerWorks into Volgistics you must obtain a Volgistics account, and you must initially login to your account to complete the Volgistics *Getting Started Interview* before you can import data into it.

If the conversion utility shows you this message, it means that the *Getting Started Interview* must first be completed in Volgistics:

❌ Volgistics account ready

To complete the Getting Started Interview, login to your Volgistics account and follow the instructions on the screen.

Note: You must also complete the Getting Started Interview if you cleared your Volgistics account before converting your VolunteerWorks data (as is recommended).

Part 3
Converting Volunteer Data

This section includes a tab-by-tab description of how each field of VolunteerWorks data converts to Volgistics.

The field names used in this section are the default VolunteerWorks and Volgistics field names. It's possible that some of the field names you see in your VolunteerWorks and Volgistics databases have been customized by your organization. The same conversion rules apply no matter what the field is currently named in either database.

Master Tab

How fields on the Master tab convert to Volgistics:

VolunteerWorks Field	Volgistics Tab	Box	Field
Last name	Core	Name	Last name
First name	Core	Name	First name
Middle	Core	Name	Middle name
Title	Core	Name	Title
Greeting	Core	Name	Nickname
Group Name	Core	Group	Group Name
Group Members	Core	Group	Members
Group	Core	Name	Kind
Number	Core	Name	Number
Address (line 1)	Core	Address	Street 1
Address (line 2)	Core	Address	Street 2
City	Core	Address	City
State/Province	Core	Address	State/Province
Zip/Postal code	Core	Address	Zip/Postal Code
Location	Core	Flags	Flag
Status	Core	Name	Status
Type	Core	Name	Type

Phone numbers
See "How VolunteerWorks Telephone Numbers Convert" later in this section.

Categories

What are known as 'Categories' in VolunteerWorks are called 'Flags' in Volgistics. These appear in the Flags box on the Core tab in Volgistics.

Plus button

The "Do not send mail" field converts to the "No mail" checkbox on the Core tab in Volgistics.

The "Household link" section is not converted to Volgistics. This feature was primarily used in VolunteerWorks as a method of reducing postage costs by eliminating redundant mail when two or more

volunteers lived at the same address. Since there has been a significant transition from postal mail communication to email communication, there is a declining need for this feature.

Any names and addresses you tracked in the "Relatives or additional addresses" section area appear on the Contacts tab in Volgistics as "relatives."

Jobs Tab

How fields on the Jobs tab convert to Volgistics:

VolunteerWorks Field	Volgistics Tab	Box	Field
Department	Service	Assignment	Assignment
Job	Service	Assignment	Assignment
Standing	Service	Assignment	Role
From date	Service	Assignment	From
To date	Service	Assignment	To
Custom date 1	Service	Assignment	Spare date
Custom date 2	*		
Custom 1	Service	Assignment	Spare drop down
Custom 2	*		
Custom 3	*		

Supervisor

This field's usefulness in VolunteerWorks is limited because it is not dynamically associated with the name of the supervisor in the corresponding VolunteerWorks job record. This means that when a supervisor is changed for a particular assignment, the Supervisor field in any of the volunteer job records is not automatically updated.

Volgistics provides a better way of managing data about assignment supervisors in its *Coordinator* tracking features. For this reason the information from the VolunteerWorks 'Supervisor' field does not convert to Volgistics.

Standing

Volgistics uses the term 'Role' instead of the term 'Standing' to describe a volunteer's role in a particular assignment. If a volunteer's "Standing" for a particular job in VolunteerWorks is 'Active,' their 'Role' for the same job in Volgistics is changed to 'Assigned' (meaning that they are currently 'assigned' to that job). This change is not arbitrary. It eliminates confusion that often exists with VolunteerWorks when the term 'Active' is used to describe both a volunteer's overall status *and* their standing in an individual assignment. Volgistics uses the term 'Active' only to describe a volunteer's overall status, and the term 'Assigned' only to describe their standing in an individual assignment.

* These fields are not converted to Volgistics

Schedule Tab

Schedule entries

Volunteer schedule entries are converted to the Schedule tab in Volgistics with these provisions:

- To simplify schedule entries, Volgistics gives you the ability to schedule on 15, 30 or 60 minute intervals. Volgistics schedule entries must therefore start and stop on a quarter hour. For example, a schedule entry could start at 10:00 or 10:15, but not at 10:06. If you have any schedule entries in VolunteerWorks that have a starting or ending time that does fall on a quarter hour, the conversion process changes them to the nearest quarter hour.

- Volgistics schedules do not have a shift name field as VolunteerWorks does. VolunteerWorks shift names therefore do not convert.

Volgistics offers several volunteer scheduling features which were not available in VolunteerWorks. These include the ability to post substitutes on the schedule, and append text notes to individual schedule entries.

Best times
Not available

"Best times" and "Not available" entries from the volunteer Schedule tab in VolunteerWorks are not converted. Volgistics provides a simple method for tracking volunteer availability in the Availability box on the Personal tab. However, this feature is organized differently in Volgistics and there is not a way to convert these fields directly.

Hours Tab

How fields on the Hours tab convert to Volgistics:

VolunteerWorks Field	Volgistics Tab	Box	Field
From date	Service	Service	From date
From time	Service	Service	From time
To date	Service	Service	To date
To time	Service	Service	To time
Department	Service	Service	Assignment
Job	Service	Service	Assignment
Hours	Service	Service	Hours
Merit hours	Service	Service	Merit hours
Meals (or Visits)	Service	Service	Meals (or Visits)
Mileage	Service	Service	Mileage
Custom 1	*		

* This field is not converted to Volgistics

The volunteer service statistics that appear in the left margin on the Hours tab in VolunteerWorks now optionally appear in the Statistics box on the Core tab in Volgistics.

In Volgistics you can choose which hour record fields you want to see on the screen, and when you make manual hour entries. For example, you can choose if hour records should have a single date, or a 'from date' and a 'to date.'

To customize this and other hour record characteristics in Volgistics:

1. Choose Setup from the menu

2. Click 'Service tracking.'

3. Click 'General.'

<u>Service Measures</u>

VolunteerWorks offers three fields in addition to 'volunteer hours' for tracking other measures of volunteer activity. These are often used for tracking things such as the number of miles driven, visits made, or meals delivered. Volgistics offers even greater capability in this regard. In Volgistics you can track up to fourteen different measures of volunteer services. Every Volgistics service report has the capability of including all of these service measures. You can also assign monetary values to each measure.

To configure Service Measures in Volgistics:

1. Choose Setup from the menu.

2. Click 'Service tracking.'

3. Click 'Service measures.'

<u>Merit hours</u>

If you use 'Merit hour' tracking in VolunteerWorks your existing merit hour values will convert into Volgistics. However, the rules that govern when merit hours should be given, and at what rate, do not convert automatically. Once the conversion is complete you must setup Merit rules in Volgistics before you begin posting hours (see "What to do after the conversion") . You should also note that Merit Hour tracking in Volgistics includes some features which are not available in VolunteerWorks, such as the ability to add or deduct service under certain conditions, such as drive time and lunch breaks.

Volgistics does not currently provide a feature comparable to VolunteerWorks "Merit hour withdrawals." If this ability is important to your organization you may not be able to migrate to the Volgistics service at this time.

<u>Pre 1990 hours</u>

Due to changes in the way detailed volunteer service entries are store in the Volgistics database, Volgistics does not store detailed hour records with dates earlier than January 1, 1990. Hour records with earlier dates *are* converted into Volgistics; however the year on these entries is adjusted to 1990. A volunteer's total hours in Volgistics will match their 'Life hours' in Volgistics following the conversion.

Organizations that have detailed hour records for earlier dates may consider printing these records from VolunteerWorks for archival storage before they convert to Volgistics.

<u>Future hours</u>

If your VolunteerWorks database includes any hour entries with a From date that is in a future year (later than the current year) the conversion utility will change these to be for the current year.

<u>Archived hours</u>

Archived hour records *are* converted from VolunteerWorks to Volgistics. If your VolunteerWorks database contains archived hours it *is not* necessary for you to restore them before you convert your data. The conversion process moves directly from the VolunteerWorks archive area into Volgistics.

Volgistics handles old hours differently than VolunteerWorks. Rather than providing an archive area for storing past hour records, Volgistics automatically displays a volunteer's hour entries for previous months and years in this consolidated manner:

- Detailed hour records for previous months initially appear in single consolidated entry for that month. You can see the detailed entries for any previous month simply by clicking on the consolidated month entry.

- Detailed hour records from previous years initially appear in a single consolidated entry for that year. You can click on any previous year to see the monthly service for that year, and you can click on any month entry to see the detailed entries for the month.

It is no longer necessary for you to periodically 'archive' old records. Every service report in Volgistics includes all of the hours for time periods you specify for the report regardless of the month or year of the entry, or if they were previously 'archived' in VolunteerWorks.

This design makes it easier to see a summary of a volunteer's service from their earliest date without having to view every single service entry posted over the years, without ever having to archive or restore any hours.

Traits tab

Traits from VolunteerWorks convert to the Profile tab in Volgistics.

VolunteerWorks traits that do not include the 'preference' field appear in Volgistics as 'Characteristics' on the Profile tab. VolunteerWorks traits that do include the 'preference' field appear in Volgistics as 'Preferences' on the Profile tab.

The two possible custom fields on VolunteerWorks Trait records are rarely used, and not converted to Volgistics.

Data from the Comments box on the Traits tab converts to the volunteer's Notes tab in Volgistics.

Personal Tab

How fields on the Personal tab convert to Volgistics:

VolunteerWorks Field	Volgistics Tab	Box	Field
SSN	Profile	Personal	Spare field 2
Personal custom 1	Profile	Personal	Spare field 3
Personal custom 3	Profile	Personal	Spare field 4
Date of birth	Profile	Personal	Date of birth
Age	Profile	Personal	Age
Gender	Profile	Personal	Spare lookup 1
Marital status	Profile	Personal	Spare lookup 3
Ethnicity	Profile	Personal	Spare lookup 4
Education	Profile	Personal	Spare lookup 2
Personal Custom 3	Profile	Personal	Spare lookup 5
Personal Custom 4	Profile	Personal	Spare lookup 6

Survey button

The results of VIC surveys do not convert to Volgistics. If you currently have a survey in progress consider completing it and recording its results before you convert to Volgistics.

Emergency button

Emergency contacts appear on the Contacts tab in Volgistics.

Medical button

VolunteerWorks Field	Volgistics Tab	Box	Field
Physician's name	Profile	Personal	Spare field 5
Physician's phone	Profile	Personal	Spare field 6
Medical custom 1	*		
Medical custom 2	*		
Medical notes	Notes	Notes	Notes

* These fields are not converted.

Photo button

Volunteer photos cannot be converted to Volgistics automatically because VolunteerWorks did not have any standards for photo dimensions or sizes, as Volgistics does; however you can upload stored volunteer photos individually if you would like.

With VolunteerWorks, photos are not actually stored within the VolunteerWorks database. Instead, photos are stored in a folder on your own computer or network. VolunteerWorks simply displays the photo you have stored on your computer when you view a volunteer record. If you see volunteer photos in VolunteerWorks it means there are individual volunteer photo files stored on your computer, and you can optionally upload these photos to Volgistics individually.

To upload volunteer photos from your computer to your Volgistics database:

1. Complete the VolunteerWorks data conversion so you see your volunteer records in Volgistics.
2. Login to Volgistics; choose Volunteers from the menu; and then open any volunteer record.
3. Click on the Profile tab for the selected volunteer.
4. Click the Upload link and then follow the instructions on the screen to upload that volunteer's photo from your computer.

Reminder tab

The VolunteerWorks 'Reminder' records are called 'Checklist' entries in Volgistics. Data from the Reminder tab in VolunteerWorks converts to the History tab in Volgistics.

VolunteerWorks Field	Volgistics Tab	Box	Field
Action	History	Dates	Event
Standing	History	Dates	Notation

Date performed	History	Dates	Date
Expiration date	History	Dates	Expires
Result	History	Dates	Result (spare drop-down)
Never expires	*		

* A simplification in the way Volgistics manages Checklist items makes it unnecessary for these fields to be converted.

Pending Reminder Actions from VolunteerWorks appear in the 'Checklist' box on the Volgistics History tab.

Volgistics offers more capability than VolunteerWorks when it comes to setting-up the rules for Checklist (Reminder) items. For example, in Volgistics you can create Checklist items that 'kick-in' a certain number of days after another Checklist item has been fulfilled. Plus, Checklist items can apply to volunteers only if they *have a certain kind* of Assignment (useful for health screenings that only apply to volunteers who serve in certain jobs).

After converting to Volgistics you should examine the rules for Checklist items. You may be able to improve or simplify the conditions under which Checklist items apply to volunteers.

Volgistics supports a maximum of 54 Checklist items per account, so if you currently have more than 54 Reminder steps in VolunteerWorks you must consolidate or delete some before you can run the conversion (the conversion checks this, and will alert you if there are more than 54).

<u>References</u>

Any volunteer references you have recorded on the Reminder tab appear on the volunteer's Contacts tab in Volgistics as 'References.'

Dates Tab

VolunteerWorks Field	Volgistics Tab	Box	Field
Occasion	History	Dates	Event
Date	History	Dates	Date
Reason	History	Dates	Notation

The date statistics (first date active, years of service, etc.) that appear in the left column on the Dates tab in VolunteerWorks, optionally appear in the Statistics box on the Core tab in Volgistics. You can control which Statistics appear in this area in Volgistics Setup (in Setup choose "Other options," and then "Statistics").

Evaluation Tab

In Volgistics you can track volunteer evaluation histories using a 'Checklist item.' There is not a separate 'Evaluation' tab in Volgistics.

If you tracked Evaluations in VolunteerWorks the conversion utility creates a Volgistics "checklist" item called 'Evaluation,' and a corresponding entry on the volunteer's History tab showing when past evaluations were completed. Individual Evaluation entries from the Evaluation tab in VolunteerWorks convert like this:

VolunteerWorks Field	Volgistics Tab	Box	Field
Evaluation type	History Dates		Notation
Date performed	History Dates		Date
Next evaluation	History Dates		Expires

The remaining fields on the VolunteerWorks Evaluation tab do not convert to Volgistics.

Custom Tab

Since the VolunteerWorks 'Custom' tab has no prescribed use, there is not any standard method for converting it to the Volgistics program. Therefore, the conversion utility cannot convert most of the data on the Custom tab. The following fields are converted as shown:

VolunteerWorks Field	Volgistics Tab	Box	Field
Custom 5	Profile	Personal	Spare checkbox 1
Custom 6	Profile	Personal	Spare checkbox 2
Custom 7	Profile	Personal	Spare checkbox 3
Custom 8	Profile	Personal	Spare checkbox 4

Organizations that used other fields on the Custom tab for a specific purpose in VolunteerWorks, and that want to move that information in Volgistics must convert those fields to a location they choose in Volgistics manually.

Notes Tab

Information on the VolunteerWorks Notes tab converts to the Notes tab in Volgistics.

Account Tab

If your VolunteerWorks database includes entries on the Account tab for 'Dues payments,' the conversion utility converts these to "Checklist items" in Volgistics.

Volgistics does not provide features comparable to VolunteerWorks for tracking ad-hoc volunteer expenses and reimbursements, nor for tracking cash or in-kind contributions. For this reason, expense types other than "Dues" do not convert to Volgistics.

Dues level

Dues level does not convert to Volgistics, however you can establish multiple Dues checklist items in Volgistics (e.g. 'Life,' 'Sustaining,' 'Junior'), and also setup these Dues items so they apply to selected volunteers (e.g. you can setup the 'Life' Dues level so it applies to volunteers flagged 'Life members').

Dues since

This field does not convert to Volgistics, however historical records of past dues payments do appear on the Volgistics history tab, in date order. This makes it easy to see the earliest date dues were paid.

Employer tab

Employer data from VolunteerWorks convert to an Employer entry on the Volgistics Contacts tab like this:

VolunteerWorks Field	Volgistics Tab	Box	Field
Employment status	*		
Key employer	*		
Employer	Contact	Employer	Spare field
Department	Contact	Employer	Street 1
Title			
Street 1	Contact	Employer	Street 2
Street 2	Contact	Employer	Street 3
City	Contact	Employer	City
State/Province	Contact	Employer	State/Province
Zip/Post	Contact	Employer	Zip
Time off program	Profile	Personal	Employer time off
Donation matching program	Profile	Personal	Donation matching
Custom	*		

* These fields are not converted to Volgistics.

Phone numbers

See "How VolunteerWorks Telephone Numbers Convert" later in this section.

Training Tab

VolunteerWorks training records convert to the History tab in Volgistics like this:

VolunteerWorks Field	Volgistics Tab	Box	Field
Course	History	Dates	Event
Standing	History	Dates	Notation
From date	History	Dates	Date
To date	History	Dates	Spare date
Expires	History	Dates	Expires
CEU's given	*		
Custom 1	*		
Custom 2	*		
Cost	*		
Paid	*		
Balance	*		

* These fields are not converted to Volgistics

Recognition Tab

All volunteer recognition history and 'queued awards' convert from VolunteerWorks into Volgistics.
Awards already presented convert to Volgistics as shown here:

VolunteerWorks Field	Volgistics Tab	Box	Field
Award	History	Dates	Event
Standing	History	Dates	Notation
Date presented	History	Dates	Date
Custom	History	Dates	Result (spare drop-down)

See "What to do after the conversion" for more information about setting award rules once the conversion is complete.

Mandate tab

If any of the volunteer records you convert into Volgistics include an entry in the "Program" field on the Mandate tab, the data converts to Volgistics like this:

VolunteerWorks Field	Volgistics Tab	Box	Field
Program	Service	Mandate	Program
Start date	Service	Mandate	Starting date
Scheduled completion date	Service	Mandate	Due by
Actual completion date	Service	Mandate	Completed on
Hours required	Service	Mandate	Required
Hours since start date	Service	Mandate	Performed
Hours remaining	Service	Mandate	Remaining
Custom	*		
Supervisor	*		
Supervisors phone	*		

* These fields are not converted to Volgistics.

If you tracked Mandatory Service in VolunteerWorks you should note two important changes in this feature when you move to Volgistics.

First, you can enter multiple 'mandates' for the same volunteer. This change is useful in organizations that track summer student volunteers, when students serve during more than one summer. In Volgistics it's no longer necessary for you to clear the data from the volunteer's mandate fields from the previous year. You can simply enter a new mandate record for the new year.

Second, when you post volunteer hours for a volunteer who has mandated service, you can specify if the hour entry should be applied to their mandate or not, and – if they have more than one mandate – which one it should apply to.

How VolunteerWorks Telephone Numbers Convert

Fields for tracking telephone numbers are organized a bit differently in Volgistics.

In VolunteerWorks, you selected a 'phone location' and then entered a corresponding phone number for that location. This gave you flexibility of being able to enter different combinations of phone numbers for different people. For example, one volunteer might have had two home phone numbers listed, and another two work phone numbers. The disadvantage to this design was that you had to do more data entry because you had to choose a phone location before actually entering the phone number.

In addition, many VolunteerWorks customers preferred to see the same kind of phone number entered in the same field location for every volunteer. For example, the home phone number first, the work phone number second, and so forth.

For these reasons, in Volgistics you no longer need to choose a phone location: you simply enter the appropriate phone number in the appropriate phone number field. An 'Other' phone number field is available for those volunteers who have an unusual combination of phone numbers.

By default, the following phone number fields always appear in Volgistics, in this order:

Home
Work
Cell Fax
Pager
Other
Email
address

This is how the data conversion process converts your VolunteerWorks phone numbers:

If the VolunteerWorks **It becomes this**
Phone Location is... **Volgistics Phone number:**

Home ....Home

Work
Business
Office
Main ....Work

Cell
Mobile
Car ....Cell

Pager
Beeper.......................................Pager

Fax ....Fax

Alternate
and all other variations .... Other

E-Mail
Email ....Email

If a VolunteerWorks volunteer record contains more phone number locations than there is space for in Volgistics, the excess numbers are placed on the Notes tab in the volunteer's Volgistics record.

Converting multiple VolunteerWorks databases into one Volgistics account

If your organization has purchased VolunteerWorks for multiple volunteer databases at different locations, you may wish to consider consolidating these separate databases into a single Volgistics. You can then use the Volgistics *site level access* capabilities to give volunteer leaders at separate sites access to just 'their' volunteer records.

You can learn more about site level access in the Volgistics documentation (visit www.Volgistics.com and search for *site level access*).

These are the procedures for converting multiple VolunteerWorks databases into one Volgistics account:

1. Create each of your 'Sites' in Volgistics before you convert any of your VolunteerWorks databases.

2. Follow the procedures in this document to convert each of your separate VolunteerWorks databases individually.

3. In Step 2 of the conversion process, *Target Site*, choose the Site you want to convert each individual VolunteerWorks database "under"

The resulting Volgistics account will include all of the individual volunteer records you converted from each separate VolunteerWorks database, organized under the Sites you selected during their conversion.

If two or more of your individual VolunteerWorks databases contain volunteer records for the same volunteer, your Volgistics database will also contain these duplicate records. In this case you should use the Volgistics "Combine" feature to combine the duplicate records once the conversion is complete.

If volunteer PIN numbers are duplicated in two or more of your VolunteerWorks databases, the conversion utility will re-assign PIN numbers during the conversion such that there are no duplicate PIN numbers in the resulting Volgistics database.

Clearing your Volgistics account

Although it's not a requirement, it's best if you can convert your VolunteerWorks data into an 'empty' Volgistics account. Converting your VolunteerWorks data into an 'empty' Volgistics account will reduce the possibility of conflicts between existing data in Volgistics, and data you're converting from VolunteerWorks.

For example, suppose you entered some volunteer records into Volgistics before you converted your VolunteerWorks data, and you decided to use "Spare Field 2" on the Volgistics Profile tab for tracking "T-shirt size." When you run the VolunteerWorks data conversion, the conversion utility will use "Spare Field 2" for "social security number" (if you tracked social security number in VolunteerWorks). In this scenario the resulting Volgistics database would have two different kinds of data in "Spare field 2." Some volunteers would have their 'T-shirt size" recorded in this field, while others (those converted from VolunteerWorks) would have their social security number stored there instead.

You can avoid these kinds of conflicts by clearing your Volgistics account before you run the conversion.

To clear your Volgistics account:

1. In Volgistics, choose Setup from the menu.

2. Choose "Account management"

3. Click "Clear account." Be sure to read the instructions on what happens when you clear your account. You should *not* clear your account if you've already entered real volunteer data that you do not want to lose.

4. Unless you have made extensive Volgistics customizations that you don't want to lose, remove the checkmark from the "Keep account setup" field in the Clear account window. This gives the conversion a clean Volgistics account to start the conversion with.

5. Follow the instructions on the Clear account window to start clearing the account.

6. When Volgistics reports that your account is being cleared, click 'Exit' from the menu to close your Volgistics session.

7. If you choose not to keep your account setup when you cleared your account, you must login to Volgistics and complete the *Getting Started Interview* before starting the VolunteerWorks conversion.

Some organizations may like to perform a test run of the conversion before they decide to migrate to Volgistics. This is okay. You can run the conversion once, then clear your account as described above, and then run the conversion again when you're ready to actually migrate to Volgistics. It is not necessary for you to setup a new Volgistics account each time you run the conversion.

Part 4
How to Run the Conversion

Before you convert

❙ The Volgistics Conversion utility is available for VolunteerWorks Version 3 only. Be sure you have updated your VolunteerWorks software to the current release. Older releases of VolunteerWorks Version 3 do not include the integrated *Volgistics Conversion Utility*. VolunteerWorks software updates are free, and your VolunteerWorks documentation includes instructions on how to obtain the current update.

❙ You must have obtained a Volgistics account before you can convert your data. You can convert your data into either a free trial account, or a paid account. Note: the number of converted records you can view in your Volgistics account is limited by your Volgistics account's service level. Trial accounts have a 50 volunteer record limit. If you just signed-up for a free trial Volgistics account, or if you've just *cleared* your Volgistics account, be sure you've logged-in once and completed the Volgistics *Getting Started Interview* before continuing.

❙ If you're converting into an existing Volgistics account, it's best if you clear your Volgistics account before you convert your VolunteerWorks data (see "Clearing your Volgistics account" in Part 3). Clearing your Volgistics account is not a requirement, however. If you already have a significant amount of data in Volgistics – or if you're converting multiple VolunteerWorks databases into one Volgistics account – you can run the conversion without clearing Volgistics.

❙ Be sure you have reviewed Parts 2 and 3 of this document and understand the database pre-requisites, and the kinds of data the conversion utility can transfer.

❙ If your VolunteerWorks database includes archived volunteer records you can convert them into Volgistics if you want to. If you want to convert all of the archived volunteer records you currently have in VolunteerWorks, it is not necessary for you to restore these from the VolunteerWorks archive before you run the conversion to Volgistics. When you run the conversion you will have a choice to include your archived volunteer records, or not to include them. If you convert your archived volunteer records from VolunteerWorks, they will transfer to the archive in Volgistics (they will still be archived in the Volgistics system).

❙ Choose the computer from which you will perform the conversion. You must perform the conversion from a computer where you can run VolunteerWorks, and that has an Internet connection.

❙ If you plan to convert multiple VolunteerWorks databases into a single Volgistics account, *and* you want the individual VolunteerWorks databases to fall under separate Volgistics Sites, establish your Site names in Volgistics first (see "Converting multiple VolunteerWorks databases into one Volgistics account" in Part 3).

❙ If you use VolunteerWorks on a PC network, no one else on the network can be using VolunteerWorks while you run the conversion.

Step 1 Connect

1. Start VolunteerWorks at a computer that has an Internet connection. If you normally establish your Internet connection manually (for example, by dialing an ISP), establish your connection before continuing.

2. In VolunteerWorks, open the Internet Menu and choose "Volgistics Conversion Utility." If your VolunteerWorks software does not include an option for the "Volgistics Conversion Utility," you must obtain the latest Version 3 update before continuing (see "Before you convert" above).

3. Click **Start** in the Volgistics Conversion Utility window.

4. On the "Connect" screen (shown below), enter the account number, login name, and password of the *Volgistics account* you want to convert your data into. Note: enter your Volgistics account credentials here, *not* your VolunteerWorks login name and password.

5. Click **Next**. If the conversion utility cannot locate an Internet connection, or if the Volgistics account credentials you entered are not correct, it will report an error. In this case, verify your Internet connection (you should be able to browse the Internet), and your Volgistics account credentials, and then try again.

Step 2 Target Site

If your Volgistics account already includes multiple Sites, the conversion utility asks you if you want to convert this VolunteerWorks database under a specific site. If the conversion utility does not ask you to choose a Target Site continue to Step 3.

If you're converting multiple VolunteerWorks databases into one Volgistics account, *and* you want the individual VolunteerWorks databases to fall under separate Volgistics Sites:

1. Choose "The records I'm importing all belong to this site."

2. Select the Site you want this VolunteerWorks database to 'fall under,'

3. Click **Next**.

If you're converting a single VolunteerWorks database, and you do not want its volunteer records to 'belong' to a single Site in Volgistics:

1. Choose "The records I'm importing do not belong to any single site."

2. Click **Next**.

Step 3 Prerequisites

The conversion utility examines your VolunteerWorks database to be sure it meets the prerequisites for conversion to Volgistics. If the conversion utility reports any un-met prerequisites (with a red "X"):

1. Click **Cancel** to close the conversion utility.

2. Refer to Part 2, *Prerequisites* and follow the instructions for meeting the pre-requisites.

If the conversion utility reports all the pre-requisites met with green arrows as shown below, click **Next** to continue.
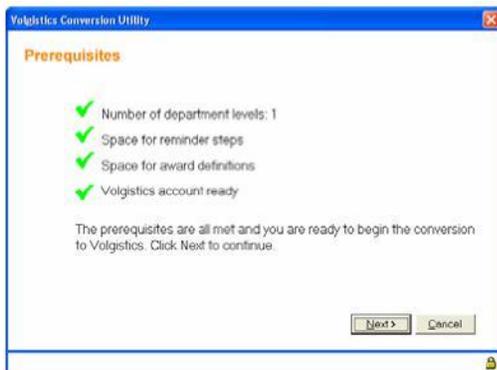
Step 4 What would you like to convert?

Next, the conversion utility asks you which records you want to convert, as shown here:

Choose which volunteer records you want to convert into Volgistics.

Choose "Convert the tagged volunteers only" if you want to convert a selected set of volunteer records, and you previously tagged these records in VolunteerWorks. Note: if you want to go back and tag records now you can click **Cancel** to close the conversion window, then start the conversion again after tagging the records you want to convert.

If you do not want to convert just the tagged records, choose "Convert all volunteers if their status is," and then choose the volunteer status categories you want to convert. If you want to convert all of the volunteer records from VolunteerWorks, choose all the of the status options. If you would like to convert only 'active' volunteers, choose just the 'Active' status.

If your VolunteerWorks database includes any archived records, and you want to convert them into Volgistics, check the 'Convert archived volunteer records' checkbox.

Click **Next** when you've made your selection.

Step 5 Convert

The conversion utility starts the conversion process. A progress bar in the lower right corner of the Volgistics Conversion Utility window shows you the overall progress of the conversion. The conversion utility reports the progress of the conversion as well as any errors or irregularities in the 'Conversion report" window.

Once the conversion is complete, the utility will report "Conversion complete. Click Next to finish." Click the **Next** button.

Step 6 Finished

Click Close to close the Volgistics Conversion Utility window.

Once the conversion is complete, follow the directions in "What to do after the conversion" below.

Configuring Internet connection settings

By default, the conversion utility will attempt to connect to the Volgistics system using the same settings your web browser uses for secure Internet connections. You should change the conversion utility's connection settings only if you cannot connect using the default settings.

To change the utility's Internet connection settings manually:

1. Choose Volgistics Conversion Utility from the Internet menu.

2. Click **Start**.

3. Click the **Connection settings** button. This opens the Internet connections settings window shown here:

Configure your connection as appropriate using these controls:

Use secure connections (SSL)

When checked, the conversion utility uses secure sockets layer (SSL) technology to encrypt the information you send to the Volgistics system during the conversion. This should normally be checked in order to provide the highest level of security possible during the transfer.

When this option is not checked, the conversion utility does not use SSL connections to transfer your data. This is a less secure approach, but it enables the conversion utility to connect in situations where the computer used to run VolunteerWorks does not support SSL connections.

Use Windows Internet connection settings

The conversion utility uses the same Internet connection settings defined for Microsoft Internet Explorer when you select this option. This option is selected by default. Selecting this option saves you from having to configure the Internet connection manually.

Uncheck this option only if you experienced a connection problem using the Windows Internet connection settings.

Auto detect proxy server settings

This option appears only if you choose not to use the Windows Internet connection settings. Select this option if your computer's Internet connection is through a proxy server on your network. When you choose this option, the conversion utility will gather information about your proxy server from the computer registry.

Use these proxy server settings

This option appears only if you choose not to use the Windows Internet connection settings. Select this option if you need to manually configure your proxy server settings (for example, if you could not connect by auto detecting the proxy settings), or if you do not use a proxy server to connect to the Internet from your computer.

Use a proxy server

Check this option when you are configuring your Internet connection manually and your computer's Internet connection is through a proxy server on your network.

Un-check this option when you are configuring your Internet connection manually and your computer's Internet connection does not use a proxy server.

Proxy address to use

This option appears only when you configure your Internet connection manually, and your Internet connection is through a proxy server. Enter the URL or IP address of your proxy server for standard HTTP and Secure (SSL) connections. If you do not know the URL or IP address contact the person who maintains the proxy server to obtain these.

When you enter a dotted IP address (e.g. 192.168.123.2), the conversion utility directs all Internet traffic to that address. When you enter a URL, the conversion utility resolves the domain name using the computer's DNS features.

Port

This option appears only when you configure your Internet connection manually, and your Internet connection is through a proxy server. Enter the Port number to use on the proxy server for HTTP and Secure (SSL) connections. If you do not know the port number(s) contact the person who maintains the proxy server to obtain these.

Proxy SSL

This option appears only when you configure your Internet connection manually, and your Internet connection is through a proxy server. It controls when to use SSL for the connection to the proxy server. Choose the value which is appropriate for your proxy server. If you do not know which value to use, contact the person who maintains the proxy server to obtain this.

Automatic   The connection to the proxy server is SSL-enabled for "https" connections but not for "http" connections

Always   The connection is always SSL-enabled.

Never   The connection is never SSL-enabled.

Tunnel   The connection is through a tunneling (HTTP) proxy.

Note: This setting does not affect the use of SSL between your proxy server and the Volgistics system. It controls only the connection between your computer and your internal proxy server.

4. Click **Save** to save your settings.

Part 5
What to do after the conversion

Receive your converted data

The volunteer records you convert into Volgistics initially appear on the 'Applications' tab in your Volgistics mailbox. From here you can choose to *receive* some or all of the converted volunteer records into your Volgistics database.

To receive your converted records:

1. Login to Volgistics.

2. From the menu choose 'Mailbox.'

3. Click on the Applications tab. The Applications tab is where your Volgistics account receives volunteer data submitted to the system electronically, such as converted data as well as newly submitted online volunteer application forms (this is why the tab is called the 'Applications' tab).

4. If you want to receive all of the converted volunteer records click the "Check all" button located near the bottom of the Applications tab. If want to receive only some of the converted records, place a check mark next to the name of each volunteer record you want to receive.

5. Click the 'Receive' button located near the bottom of the Applications tab to move the selected volunteer records into your database.

You are now ready to being working with your imported information.

Your Volgistics account *service level* limits the number of volunteer records you can enter into Volgistics. If there is not enough space in your account to receive all of the volunteer records you want to convert you can:

• Choose to convert only as many records as you currently have space for
• Increase your account service level to provide space for tracking more volunteers
• Delete any un-needed existing volunteer records from the account.

Awards

The conversion utility moves all of your volunteer award records into Volgistics, however it does not convert the rules you may have established in VolunteerWorks to define when awards are given, and to whom. You must setup these award rules manually in Volgistics once the conversion is complete.

To do this:

1. In Volgistics, choose Setup from the menu.

2. Click on "Awards." You'll see a list of Award names that includes the awards converted from VolunteerWorks, plus any awards you previously created in Volgistics. For each award listed:

a. Click on the name of the Award.

b. Under "Volunteers are eligible for this award if they meet **all** of these service conditions...," check to be sure the rules for the award are correct.

c. If you only give this award only to certain kinds of volunteers, use the "Volunteers receive this award only if..." section to choose the Flags or Type that indicate the kind of volunteers who should receive the award.

d. If the selected award is part of a sequence of awards, such as 100, 500 and 1,000 hours awards, and it is not the very first award in the sequence, scroll down to the bottom of the Award setup window and choose the award this one "comes after." For example, the 500 hour award might 'come after' the 100 hour award.

e. Click 'Save' to save any changes you make to each award.

Once you're finished, Volgistics will 'queue' volunteers for awards based on the rules you've tailored.

To see which awards a volunteer is ready to receive:

1. In Volgistics, choose Volunteers from the menu.

2. Locate the name of the volunteer whose awards you want to examine.

3. Click on the 'History' tab. Any awards that the selected volunteer is currently ready to receive appear in the Checklist box. For example, the Checklist box would look like the one shown in the following illustration for a volunteer ready to receive a '5 year award'

To see a list of all volunteers ready to receive a particular award:

1. In Volgistics, choose "Tickler" from the menu.

2. In the "Award" section, check the award(s) you want to see.

3. Click Go.

To see which awards a volunteer has previously received:

1. In Volgistics, choose Volunteers from the menu.

2. Locate the name of the volunteer whose awards you want to examine.

3. Click on the 'History' tab. The list of awards the volunteer has previously received appears in the Dates box. Note: In order to appear here, an award record must have either been converted from VolunteerWorks or posted in Volgistics by you. Unless prior awards were previously recorded Volgistics or VolunteerWorks, Volgistics has no way of knowing that a volunteer previously received a given award.

Reminder Steps

The conversion utility converts all of the records of Reminder Steps volunteers have completed (these appear on the Reminder tab in VolunteerWorks), however it does not convert the rules that specify which volunteers each reminder step applies to or when. You must setup these rules manually in Volgistics after the conversion is complete.

To do this:

1. In Volgistics, choose Setup from the menu.

2. Click on "Checklist." You'll see a list of checklist items that includes the "Reminder Steps" converted from VolunteerWorks, plus any checklist items you previously created in Volgistics. For each item listed:

3. Click on the name of the item.

4. In the "Checklist Item" box, choose the rules you want to apply to this item.

5. Click the Save button at the bottom of the "Checklist Item" box.

Once you're finished, Volgistics will show the checklist items each volunteer still needs to complete based on the rules you've set.

To see which Checklist items a volunteer needs to complete:

1. In Volgistics, choose Volunteers from the menu.

2. Locate the name of the volunteer whose Checklist you want to examine.

3. Click on the 'History' tab. Any Checklist items that the selected volunteer currently needs to complete appear in the Checklist box with an un-checked checkbox. For example, the Checklist box would look like this for a volunteer who needs to complete a Health Screening and a Driver's License Check:

To see a list of all volunteers who need to complete a particular Checklist item:

1. In Volgistics, choose "Tickler" from the menu.

2. In the "Checklist" section, check the item(s) you want to see.

3. Click Go.

To see which Checklist items a volunteer has previously completed:

1. In Volgistics, choose Volunteers from the menu.

2. Locate the name of the volunteer whose Checklist you want to examine.

3. Click on the 'History' tab. The list of Checklist items the volunteer has previously completed appears in the Dates box.

Merit Hours

The conversion utility converts all of the hour records for the volunteers you choose to convert to Volgistics, including any Merit hour values, if you use Merit hours in VolunteerWorks. However the conversion utility does not convert the rules for Merit hours. If you use Merit Hour tracking in VolunteerWorks you must setup your Merit hour rules in Volgistics after you convert your data.

To do this:

1. In Volgistics, choose Setup from the menu.

2. Choose "Service tracking."

3. Choose "Merit hours."

4. As in VolunteerWorks, Volgistics provides space for as many as four different rules that define when Merit hours should be given, and the rate that should be used to calculate Merit hours. Click on "Rule 1" to define a first rule, "Rule 2" to define a second rule, and so forth.

System Operators

The conversion utility does not convert VolunteerWorks system operators into Volgistics. If there are other people who will use Volgistics in your office, and you have not already made them Volgistics System Operators you must do so manually.

To create System Operators in Volgistics:

1. Choose Setup from the menu.

2. Click on "System Operators."

3. Click on "Create a new system operator."

4. Use the "New System Operator" box to enter the information about the new operator, and then click the Save button.

Comparing volunteer hours

If you tracked volunteer hours in VolunteerWorks, the conversion utility transfers all of the volunteer hour records from VolunteerWorks for each volunteer you convert to Volgistics, including any hour records that may have been archived in VolunteerWorks.

After the conversion is complete, you can compare the total number of hours recorded for any selected Volunteer in VolunteerWorks to the number of hours recorded for the same volunteer in Volgistics. Compare volunteer hours by looking at a selected volunteer's *Total Hours* on their Hours tab in VolunteerWorks and comparing that number to their *Life Hours* on the Core tab in Volgistics. See the illustration below for an example.

"Year to date" hours will look the same in both programs only if your fiscal year is set the same in both VolunteerWorks and Volgistics.

There are two conditions which could cause a volunteer to have a different number of *Life Hours* in Volgistics than they have *Total Hours* in VolunteerWorks:

1. Duplicate hour entries

Since the conversion utility will not insert duplicate records in Volgistics, if a volunteer has two or more duplicate hour records in VolunteerWorks (for the exact same dates, times, assignment, and hours), the duplicate records are not converted into Volgistics.

For example, suppose a volunteer has two hour records in VolunteerWorks with these same values:

Date: March 1, 2000 From
Time: 8:00 am To Time:
10:00 am Assignment:
Information Desk
Hours: 3

Since the two records are exactly the same, the conversion utility inserts only one of the records into the Volgistics database. This means that, in this example, Volgistics will show 3 fewer *Life Hours* than VolunteerWorks shows *Total Hours* (VolunteerWorks includes both of the duplicate entries in *Total Hours*).

2. Changed data

The second scenario that could cause a volunteer to have different *Life Hours* in Volgistics than they have *Total Hours* in VolunteerWorks is if you have made any changes to a volunteer's service records in either VolunteerWorks or Volgistics after the conversion is initially run, before you compare their volunteer hours.

You can compare "Total Hours" from the Hours tab in VolunteerWorks to "Life" hours on the Core tab in Volgistics for a selected volunteer.

In Volgistics. the term "Life Hours" refers to all hours recorded for the volunteer. In Volunteerworks this is known as "Total Hours."

Troubleshooting

Conversion utility can not connect to the Volgistics system

If the Conversion Utility cannot connect to the Volgistics system, check your computer's Internet connection. You should be able to browse web sites that are outside of your organization's network, including www.volgistics.com from the computer where you run the conversion. If you can browse the Internet from the computer you are using to run the conversion utility but you still cannot connect to the Volgistics system, check these things:

1. Some organizations use 'firewalls' to control Internet access. If your organization uses a firewall, check with the person who maintains the firewall to be sure it does not prevent you from making SSL connections to https://www.volgistics.com.

2. Some organizations use Proxy Servers to manage Internet access. If your organization uses a proxy server, see *Configuring Internet connection settings* in Part 4.

VolunteerWorks conversion utility appears to start but never reports any progress

While the conversion is running from VolunteerWorks you should see a series of progress messages on the screen. If you don't see any progress messages there may have been an Internet connection issue.

Check to be sure you can visit www.volgistics.com from the computer where you're running the conversion. If you cannot connect to www.volgistics.com contact your ISP or network administrator.

If your organization uses a firewall, check with the person who maintains the firewall to be sure it does not prevent you from making SSL connections to https://www.volgistics.com.

These steps may also resolve connection issues:

1. Choose Volgistics Conversion Utility from the Internet menu in VolunteerWorks.

2. Click Start.

3. Click the Connection settings button. This opens the Internet connections settings window.

4. Change the state of the 'Use Windows Internet connection settings' checkbox (if it is currently checked, uncheck it; if it is not currently checked, check it).

5. Click Save to save your settings.

Try the conversion again.

If you continue to experience a connection issue there may be a firewall or proxy server that prevents an SSL connection from the conversion utility. Although it may be somewhat less secure than using an SSL connection, your can turn off SSL like this:

1. Choose Volgistics Conversion Utility from the Internet menu in VolunteerWorks.

2. Click Start.

3. Click the Connection settings button. This opens the Internet connections settings window.

4. Uncheck "Use secure connections (SSL)."

5. Click Save to save your settings.

Internet connection drops during the conversion

A dropped Internet connection will not damage any data, but it will leave the conversion incomplete, and you'll need to start the conversion over again. The conversion process will not insert duplicates into your Volgistics account when restarted.

Invalid account number, login name, or password

If you receive an error that you have entered an invalid account number, login name, or password when you try to connect with conversion utility, verify your entries by attempting to Login to your Volgistics account at www.volgistics.com using the same account number, login name, and password. **Note:** Be sure you are using your *Volgistics* account number, login name, and password in the conversion utility and *not* your VolunteerWorks credentials.

If you *cannot* Login to Volgistics using these credentials, the account number, login name, or password you are using are invalid. Contact your organization's Volgistics administrator, or obtain your forgotten password from www.volgistics.com.

If you *can* login to www.volgistics.com using the same credentials you're using to start the conversion utility, but the conversion utility continues to report an invalid account number, login name, or password; and you connect to the Internet through a proxy server, your computer may not be properly configured for secure Internet traffic. See *Configuring Internet connection settings* in Part 4.